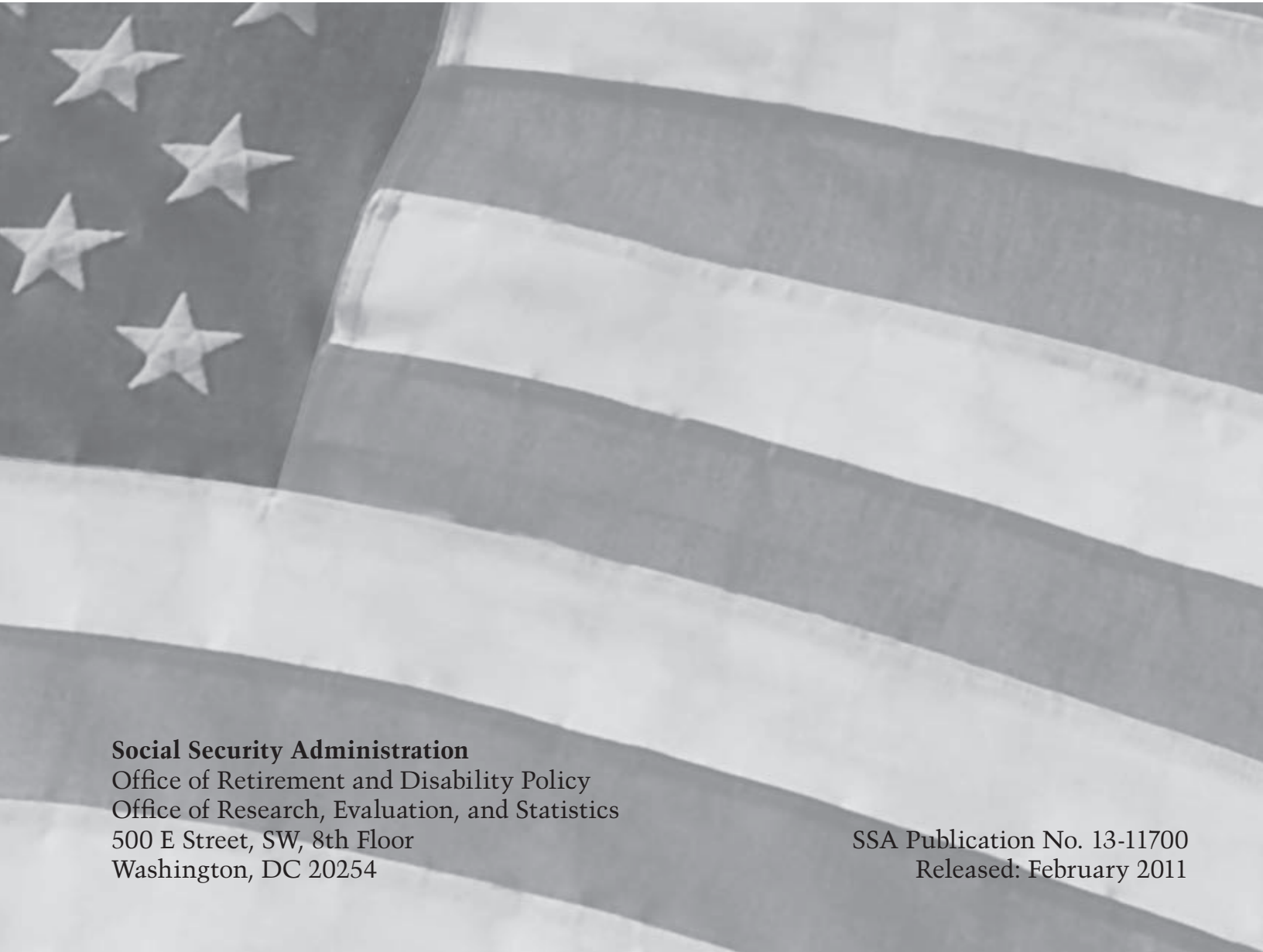


ANNUAL STATISTICAL SUPPLEMENT TO THE SOCIAL SECURITY BULLETIN, 2010



Social Security Administration
Office of Retirement and Disability Policy
Office of Research, Evaluation, and Statistics
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Preface

The *Supplement* is a major resource for data on our nation's social insurance and welfare programs. The majority of the statistical tables present information about programs administered by the Social Security Administration—the Old-Age, Survivors, and Disability Insurance program, known collectively as Social Security, and the Supplemental Security Income program. In addition, data are presented on the major health care programs—Medicare and Medicaid—and social insurance programs, including workers' compensation, unemployment insurance, temporary disability insurance, Black Lung benefits, and veterans' benefits. The *Supplement* also includes program summaries and legislative histories that help users of the data understand these programs. Please note that additional disability tables and statistics can be found in the *SSI Annual Statistical Report* and the *Annual Statistical Report on the Social Security Disability Insurance Program*.

The *Supplement* has been published annually since 1940. Decisions affecting the future of Social Security are facilitated by the availability of relevant data over a long period. The data provide a base for research, policy analysis, and proposals for changing the programs. In addition to meeting the Social Security Administration's information needs, the *Supplement* strengthens the agency's ability to respond to requests for program data from congressional committees, government agencies at all levels, and the research community.

The *Supplement* is prepared by Social Security Administration staff from various components throughout the agency and by many individuals from other federal agencies. I would like to express my thanks to them for their contributions. The inside cover includes a list of the persons and agencies contributing to this edition.

Your suggestions and comments on this report are welcome. Any suggestions, comments, or general questions about the report should be directed to Angela Y. Harper at 410-966-9541 or supplement@ssa.gov. For specific questions about the data, please call or e-mail the contact listed under each table or section. For additional copies of this report, please e-mail op.publications@ssa.gov. This report is available on our website at <http://www.socialsecurity.gov/policy>, as are the *SSI Annual Statistical Report*, the *Annual Statistical Report on the Social Security Disability Insurance Program*, and other reports.

Manuel de la Puente
Associate Commissioner
for Research, Evaluation, and Statistics

February 2011

Errata Policy

If there are any additions or corrections to the data published herein, they will be posted as errata on the Web at <http://www.socialsecurity.gov/policy/docs/statcomps/supplement/2010/index.html>.

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Social Security (OASDI)

Employment and Earnings

Workers in OASDI covered employment, 2009	157.6 million
Average earnings, 2009	\$39,223
Earnings required in 2010 for—	
1 quarter of coverage	\$1,120
Maximum of 4 quarters of coverage	\$4,480
Earnings test exempt amounts for 2010	
Under full retirement age for entire year	\$14,160
For months before reaching full retirement age in 2010	\$37,680
Beginning with month of reaching full retirement age in 2010	Test eliminated

Program Data

Cost-of-living adjustment for December 2009	0.0 percent
Average monthly benefit, December 2009	
Retired workers	\$1,164
Widows and widowers, nondisabled	\$1,124
Disabled workers	\$1,064
Number of beneficiaries, December 2009	
Old-Age, Survivors, and Disability Insurance	52.5 million
Old-Age Insurance	
Total	36.4 million
Retired workers	33.5 million
Survivors Insurance	
Total	6.4 million
Widows and widowers, nondisabled	4.1 million
Disability Insurance	
Total	9.7 million
Disabled workers	7.8 million
Benefit payments, 2009	
Old-Age, Survivors, and Disability Insurance	\$675.5 billion
Old-Age and Survivors Insurance	\$557.2 billion
Disability Insurance	\$118.3 billion
Administrative expenses, 2009	
Old-Age and Survivors Insurance	
Amount	\$3.4 billion
As a percentage of total benefits paid	0.6 percent
Disability Insurance	
Amount	\$2.7 billion
As a percentage of total benefits paid	2.3 percent

Program Trends

- About 52.5 million persons received Social Security benefits for December 2009, an increase of 1,624,575 (3.2 percent) since December 2008. Sixty-nine percent were retired workers and their spouses and children, 12 percent were survivors of deceased workers, and 19 percent were disabled workers and their spouses and children.
- Seventy-four percent of the 33.5 million retired workers received reduced benefits because of entitlement prior to full retirement age. Relatively more women (76.4 percent) than men (71.4 percent) received reduced benefits.
- The number of beneficiaries aged 65 or older rose from about 33.7 million in 2004 to more than 36.5 million in 2009 (8.3 percent). The number of beneficiaries aged 85 or older increased at a greater rate during the 5-year period (17.3 percent), from fewer than 4.4 million in 2004 to more than 5.1 million in 2009. In 2009, about 49,000 centenarians were receiving Social Security.
- About 20.7 million women aged 65 or older received benefits for December 2009. About 8.9 million (43.0 percent) were entitled solely to a retired-worker benefit. About 6.1 million (29.5 percent) were dually entitled to a retired-worker benefit and a wife's or widow's benefit, and about 5.7 million (27.5 percent) were receiving wife's or widow's benefits only.
- Nearly 3.2 million children under age 18 received benefits, including 1,258,817 children of deceased workers, 1,598,189 children of disabled workers, and 301,132 children of retired workers.
- About 8.9 million persons received benefits based on disability—7,788,013 disabled workers, 920,883 disabled adult children, and 236,480 disabled widows and widowers. In addition, 158,122 spouses and 1,657,713 minor and student children of disabled workers received benefits.
- Average monthly benefits for December 2009 were \$1,164 for retired workers, \$1,064 for disabled workers, and \$1,124 for nondisabled widows and widowers. Among retired workers, monthly benefits averaged \$1,312 for men and \$1,011 for women. For disabled workers, average monthly benefits were \$1,189 for men and \$925 for women. No cost-of-living adjustment for 2010 went into effect in December 2009.
- Average monthly family benefits for December 2009 were \$2,110 for a widowed mother or father and children; \$1,835 for a disabled worker, wife, and children; and \$2,394 for a retired worker, wife, and children.
- Total OASDI benefit payments for calendar year 2009 were \$675.5 billion. Payments from the OASI trust fund were \$557.2 billion—an increase of 9.4 percent from the \$509.1 billion paid in 2008.
- Benefit payments from the DI trust fund, from which benefits are paid to disabled workers, their spouses, and children, increased by 11.3 percent from \$106.3 billion in 2008 to \$118.3 billion in 2009.
- OASDI benefit awards in calendar year 2009 totaled 5,728,086, including 2,739,966 to retired workers, 531,535 to their spouses and children, and 899,645 to survivors of insured workers. Benefits were awarded to 970,696 disabled workers and to 586,244 of their spouses and children.

Supplemental Security Income

Annual Payment Adjustments

Monthly federal benefit rate, effective January 2010

Individual living in his or her own household

\$674

Couple with both members eligible

\$1,011

Cost-of-living adjustment

0.0 percent

Program Data

Federally administered payments

Benefits paid in 2009

\$46.6 billion

Number of recipients, December 2009

7.7 million

Average benefit, December 2009

\$498.75

Federal SSI payments

Benefits paid in 2009

\$42.6 billion

Number of recipients, December 2009

7.4 million

Average benefit, December 2009

\$476.33

Federally administered state supplementation

Benefits paid in 2009

\$4.0 billion

Number of recipients, December 2009

^a 2.3 million

Average benefit, December 2009

\$124.96

a. Includes 2.0 million persons receiving federal SSI and state supplementation and 0.3 million persons receiving state supplementation only.

Program Trends

- In December 2009, 7,676,686 persons received federally administered SSI payments—156,185 more than the previous year. Of the total, 2,025,610 (26.4 percent) were aged 65 or older; 4,451,288 (58.0 percent) were blind or disabled aged 18–64; and 1,199,788 (15.6 percent) were blind or disabled under age 18.
- The number of blind or disabled aged 18–64 rose by 118,192 (2.7 percent) between December 2008 and December 2009, and the number under age 18 increased by 45,944 (4.0 percent).
- During 2009, 999,540 persons were awarded federally administered payments, an increase of 80,394 from the previous year. Of the 2009 awards, 694,242 went to blind or disabled recipients aged 18–64, 196,745 to those blind or disabled under age 18, and 108,553 to recipients aged 65 or older.
- Total federally administered SSI payments were \$46.6 billion in 2009, up 8.4 percent from 2008. Federal SSI payments in 2009 were \$42.6 billion (an increase of 10.1 percent over the previous year). Federally administered state supplementation totaled \$4.0 billion.

Health Care

Medicare

Total benefits paid in calendar year 2009	
Hospital Insurance (Part A)	\$239.3 billion
Supplementary Medical Insurance (Part B)	\$263.0 billion
Number of enrollees in July 2009 (one or both of Parts A and B)	46.5 million
Aged	38.8 million
Disabled	7.8 million
Administrative costs, 2009	
Hospital Insurance	
Amount	\$3.2 billion
As a percentage of total benefits paid	1.3 percent
Supplementary Medical Insurance	
Amount	\$3.5 billion
As a percentage of total benefits paid	1.3 percent

Medicaid

Medical service expenditures in fiscal year 2008	\$296.6 billion
Number of unduplicated recipients, fiscal year 2008	58.7 million
Average 2008 vendor payment per unduplicated recipient	
Persons aged 65 or older	\$14,748
Permanently and totally disabled persons	\$14,840
Dependent children under age 21	\$2,035
Average 2008 vendor payment for medical services	
Nursing facility services	\$29,515
Inpatient general hospital care	\$7,082
Prescribed drugs	\$958
Physicians services	\$485

Other Social Insurance Programs and Veterans' Benefits

Unemployment Insurance

Total payments, 2008	\$42.7 billion
Average—	
Weekly benefit amount (regular programs)	\$297.10
Duration of benefits	14.9 weeks
Weekly insured unemployment	3.3 million
Covered employment	132.8 million

Workers' Compensation

Benefit payments, 2008	\$57.6 billion
Compensation payments	\$28.5 billion
Medical and hospitalization	\$29.1 billion
Benefits paid by—	
Private insurance carriers	\$30.2 billion
State and federal funds	\$13.9 billion
Employers' self-insurance	\$13.6 billion
Covered workers per month	130.6 million
Costs as a percentage of covered payroll	1.33 percent

Temporary Disability Insurance

Average weekly benefit, 2007	
California	
State fund	\$405
Private plans	\$638
New York	
Private plans	\$196

NOTE: Programs in effect in California, Hawaii, New Jersey, New York, Rhode Island, Puerto Rico, and the railroad industry.

Black Lung Benefits

Basic benefit to miner or widow	\$616
Maximum family benefit	\$1,232
Part B (claims filed before July 1, 1973)	
Number of monthly benefits to miners, widows, and dependents, December 2009	28,558
Total benefits paid, calendar year 2009	\$232.0 million
Part C (claims filed July 1, 1973, or later)	
Total benefits paid, fiscal year 2009	
Disability and survivors benefits	\$251.0 million
Medical benefits	\$31.0 million

Veterans' Benefits

Number of veterans with disability compensation or pension, 2009	
Service-connected disability	3,070,000
Nonservice-connected disability	314,000
Monthly payment in 2010 for—	
Service-connected disability	
10 percent disability	\$123
Total disability	\$2,673
Nonservice-connected disability (maximum payment)	
Without dependent	\$986
With one dependent and in need of aid and attendance	\$1,950

Poverty Data


Weighted average poverty thresholds, 2009

Individual, aged 65 or older	\$10,289
Couple, householder aged 65 or older	\$12,984
Family of four	\$21,947

Percentage of population with income below poverty level, 2008

All ages	13.3 percent
Children under age 18 living in families	18.4 percent
Persons aged 65 or older	9.8 percent

PROGRAM DESCRIPTIONS AND LEGISLATIVE HISTORY



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Social Security (Old-Age, Survivors, and Disability Insurance)

The Old-Age, Survivors, and Disability Insurance (OASDI) program provides monthly benefits to qualified retired and disabled workers and their dependents and to survivors of insured workers. Eligibility and benefit amounts are determined by the worker's contributions to Social Security. There is no means test to qualify for benefits, although there is a limit on income earned from working that applies to those under the full retirement age.

At the end of December 2009, 52.5 million people were receiving benefits at a rate exceeding \$55 billion each month (\$675 billion annually). According to the latest Social Security Trustees Report, these cash benefits made up 4.8 percent of the nation's gross domestic product. During the same year, approximately 156 million employees and self-employed workers, along with employers, contributed \$667 billion to the OASDI trust funds—through which contributions are credited and benefits are paid.

Social Security benefits are essential to the economic well-being of millions of individuals. In 2008, Social Security paid benefits to 88 percent of married couples and 86 percent of nonmarried persons aged 65 or older. It is the major source of income (providing at least 50 percent of total income) for 52 percent of married couples and 73 percent of nonmarried persons aged 65 or older. It contributes 90 percent or more of income for 21 percent of married couples and 43 percent of nonmarried persons aged 65 or older. (Total income excludes withdrawals from savings and nonannuitized IRAs or 401(k) plans; it also excludes in-kind support, such as food stamps and housing and energy assistance.)

Contributions and Trust Funds

A person contributes to Social Security through either payroll taxes or self-employment taxes under the Federal Insurance Contributions Act (FICA) or the Self-Employment Contributions Act (SECA). Employers match the employee contribution, while self-employed workers pay an amount equal to the combined employer-employee contributions. (Self-employed workers receive a special tax deduction to ease the impact of paying the higher rate.) There is a maximum yearly amount of earnings subject to OASDI taxes—\$106,800 in 2010. There is no upper limit on taxable earnings for Medicare Hospital Insurance. Employees whose earnings exceed the maximum taxable amount because they worked for more than one employer can receive refunds of excess FICA payments when they file their tax returns.

Taxes are allocated to three trust funds: the Old-Age (retirement) and Survivors Insurance (OASI), the Disability Insurance (DI), and the Medicare Hospital Insurance (HI) Trust Funds. In addition to the taxes on FICA- and SECA-covered earnings, OASI and DI trust fund revenues include interest on trust fund securities, income from taxation of OASI and DI benefits, certain technical transfers, and gifts or bequests. By law, the OASI and DI trust funds may only be disbursed for

- monthly benefits for workers and their families,
- vocational rehabilitation services for disabled beneficiaries,
- administrative costs (currently less than 1 percent of expenditures), and
- the lump-sum death payment to eligible survivors.

Revenue received from FICA and SECA payments is transferred to the U.S. Treasury. Revenue in excess of outlays is used to purchase special interest-bearing Treasury bonds. These securities remain assets of the trust funds until needed to cover Social Security costs.

Structure and Organization

The OASDI program is administered by the Social Security Administration (SSA), which became an independent agency in 1995. The commissioner of Social Security serves a 6-year term following appointment by the president and confirmation by the Senate. A bipartisan Social Security Advisory Board serves to review existing laws and policies, commission studies, and issue recommendations intended to anticipate changing circumstances. The president appoints three of the seven board members, and Congress appoints the other four members.

The Social Security Administration's organization is centrally managed, with a nationwide network of over 1,500 offices, which includes Field Offices, Regional Offices, Teleservice (800-Number) Centers, Processing Centers, Hearings Offices, and State Disability Determination Services. The organizational structure is designed to provide timely, accurate, and responsive service to the public. By integrating support services for all programs, the Agency enhances efficiency, avoids duplication of effort, and increases opportunities to provide one-stop service to the public.

The Social Security Administration is headquartered in Baltimore, Maryland. Major headquarter components include the National Computer Center, which contains

the mainframe computers that drive SSA systems; much of the executive staff for policy, programs, operations, and systems; and field support components.

SSA's field structure is divided into 10 geographic regions containing about 1,300 field offices in communities throughout the country. Field offices are the primary setting for personal contact with the public. Office sizes range from large urban offices with 50 or more employees to remote resident stations staffed by one or two individuals. Each region is headed by a regional commissioner and staffed with specialists to handle regional administrative tasks and to assist field offices with operational issues. In addition, there are teleservice centers providing national toll-free service (1-800-772-1213). Although physically located within the various regions, each teleservice center manages the public's Social Security business from throughout the nation using state-of-the-art communications systems.

Eight processing centers handle a variety of workloads involving disability cases, international claimants, earnings records, and ongoing eligibility for Supplemental Security Income payments, as well as providing service and support for the field offices and answering calls to the toll-free number. The Hearings Offices and Appeals Council make decisions on appeals of Social Security determinations in claims for benefits.

Tables 2.F1–2.F11 provide SSA administrative data on the agency's national offices and workforce (**Tables 2.F1–2.F3**), claims workloads (**Tables 2.F4–2.F6**), delivery of services (**Table 2.F7**), and hearings and appeals operations (**Tables 2.F8–2.F11**).

Program Changes

Program changes occur through legislation or (in areas where authority is delegated to the commissioner) through regulation. Changes are often implemented in phases and may entail recurring annual changes beyond the initial enactment date or year of first implementation.

Coverage and Financing

In 2010, about 156 million people will work in employment or self-employment that is covered under the OASDI program. In recent years, coverage has become nearly universal for work performed in the United States, including American Samoa, Guam, the Northern Mariana Islands, Puerto Rico, and the U.S. Virgin Islands. Approximately 93 percent of the U.S. workforce is covered by OASDI. Workers excluded from coverage fall into five major categories:

1. Civilian federal employees hired before January 1, 1984;
2. Railroad workers (who are covered under the railroad retirement system, which is coordinated with Social Security);
3. Certain employees of state and local governments who are covered under their employers' retirement systems;
4. Domestic workers and farm workers whose earnings do not meet certain minimum requirements (workers in industry and commerce are covered regardless of the amount of earnings); and
5. Persons with very low net earnings from self-employment, generally under \$400 annually.

Table 2.A1 outlines the history of coverage provisions and **Table 2.A2** provides a history of provisions regarding noncontributory wage credits, mostly for military service.

For most employees, taxes are withheld from wages beginning with the first dollar earned. The exceptions are domestic employees, election workers, and agricultural workers. In 2010, a domestic employee must earn \$1,700 from any single employer in a calendar year before FICA is withheld. Most election workers must earn \$1,500 in 2010 before FICA is withheld. Most agricultural workers' wages are covered if the employer pays more than \$2,500 in total wages in a year or if the individual worker earns over \$150 in a year from a single employer.

Employees, their employers, and the self-employed pay taxes on earnings in covered employment up to an annual maximum taxable amount for OASDI. There is no upper limit on taxable earnings for Medicare Hospital Insurance (HI). The OASDI maximum taxable amount—\$106,800 in 2010—is updated automatically each year in relation to increases in the national average annual wage. The current FICA tax rate applicable to both employees and employers is 6.2 percent for OASDI (5.30 percent for OASI and 0.9 percent for DI) and 1.45 percent for HI. Those who are self-employed pay the combined employee-employer rate of 12.4 percent for OASDI and 2.9 percent for HI under SECA.

See **Table 2.A3** for annual amounts of maximum taxable earnings and contribution rates. **Table 2.A4** shows historical annual maximum amounts of contributions by employees and self-employed individuals.

Two deduction provisions reduce the SECA and income tax liability of self-employed persons. The intent of these provisions is to treat the self-employed in much

the same manner as employees and employers are treated for purposes of FICA and income taxes. The first provision allows a deduction from net earnings from self-employment equal to the amount of net earnings before the deduction multiplied by one-half the SECA tax rate. The effect of this deduction is intended to be analogous to the treatment of the FICA tax paid by the employer, which is disregarded as remuneration to the employee for FICA and income tax purposes. The second provision allows an income tax deduction equal to one-half of the amount of the SECA tax paid, which is designed to reflect the income tax deductibility of the employer's share of the FICA tax.

Table 2.A5 describes income tax credits for 1984–1989 intended to cushion the impact of increases in FICA and SECA taxes enacted in 1983. The SECA tax credits were replaced, effective 1990, by the deduction provisions described above. **Table 2.A6** outlines the history of provisions regarding appropriations from general revenues and interfund borrowing.

Insured Status

Workers attain insured status upon earning the minimum number of credits needed to become eligible for Social Security benefits. Insured status is also required to establish benefit eligibility for the worker's family members or survivors. The requirements for insured status differ depending on the type of benefit involved.

To determine a worker's insured status, Social Security looks at the amount of the worker's earnings (employment or self-employment) covered under Social Security and assigns "credits" for those earnings. These credits are called quarters of coverage. In 2010, one quarter of coverage (QC) is credited for each \$1,120 in annual covered earnings, up to a maximum of four QCs for the year. Earnings of \$4,480 or more in 2010 will give the worker the maximum four QCs for the year regardless of when the money is actually paid during the year. The amount of earnings required for a QC is adjusted automatically each year in proportion to increases in the average wage level.

Fully Insured

Eligibility for most types of benefits requires that the worker be fully insured. To be fully insured, a worker must have a number of QCs at least equal to the number of calendar years elapsing between the year in which the worker is age 21 (or 1950, if later) and the year in which he or she reaches age 62, becomes disabled, or dies—whichever occurs first. To compute "elapsed" years, Social Security does not count the year in which the worker attains age 21 (or 1950, if later) or the year in which the worker attains age 62, becomes disabled, or

dies. If the resulting number of elapsed years is less than 6, the number is raised to 6. All workers need at least 6 QCs to be insured. Workers who reach age 62 in 1991 or later need 40 QCs to be fully insured. Special rules may apply if the worker had a prior period of disability. For workers who become disabled or die before age 62, the number of QCs needed for fully insured status depends on their age at the time of disability or death.

Currently Insured

Generally, if a worker dies before meeting fully insured status, benefits can still be paid to certain survivors if the worker was "currently insured" at the time of death. Survivors benefits are potentially payable to a worker's children and to a widow(er) who takes care of the deceased's child who is under age 16 or disabled and receiving Social Security benefits. To be currently insured, the worker must have earned 6 QCs in the 13 quarters ending with the quarter of death.

Additional Insured Status Requirements for Noncitizens

The Social Security Protection Act of 2004 (Public Law 108-203) was signed into law on March 2, 2004. Section 211 of this law imposed additional requirements for determining fully and currently insured status. These additional requirements affect noncitizen workers to whom Social Security did not assign a Social Security number (SSN) before January 1, 2004. A noncitizen worker must meet one of two additional requirements under section 211 in order for anyone to qualify for an OASDI benefit based on the earnings record of the noncitizen worker. These benefits include retirement or disability insurance benefits, dependents or survivors insurance benefits, the lump-sum death payment, and Medicare based on end-stage renal disease.

For purposes of the above paragraph:

1. The noncitizen worker must have been assigned an SSN for work purposes at any time on or after January 1, 2004; or
2. The noncitizen worker must have been admitted to the United States at any time as a nonimmigrant visitor for business (B-1) or as an alien crewman (D-1 or D-2).

If a noncitizen worker who was not assigned an SSN before January 1, 2004, does not meet one of these additional requirements, then he or she cannot be fully or currently insured. No one would qualify for OASDI benefits based on the noncitizen worker's earnings. This is true even if the noncitizen worker appears to have the required number of quarters of coverage (QCs) in accordance with the regular insured status provisions.

Disability Insured

To qualify for disability benefits, a nonblind worker must have recent work activity in addition to being fully insured. Under the requirement involving recent work, a nonblind worker who is age 31 or older must have earned at least 20 QCs during the 40-calendar-quarter period ending with the quarter in which the disability began. In general, workers disabled at ages 24 through 30 must have earned QCs in one-half of the calendar quarters beginning with the quarter after the quarter in which age 21 is attained and ending with the calendar quarter in which the disability began. In this case, the quarters counted will go back before the quarter in which the worker turned age 21. Workers under age 24 need 6 QCs in the 12-quarter period ending with the quarter in which the disability began. Workers who qualify for benefits based on blindness need only be fully insured. Special rules may apply if the worker had a prior period of disability.

Table 2.A7 summarizes the basic provisions concerning insured status.

International Agreements

The president is authorized to enter into international Social Security agreements (also called *totalization agreements*) to coordinate the U.S. Old-Age, Survivors, and Disability Insurance (OASDI) program with comparable programs of other countries. The United States currently has Social Security agreements in effect with 24 countries.

Social Security agreements and supplementary agreements, by effective dates

Australia	2002	Italy	1978, 1986
Austria	1991, 1997	Japan	2005
Belgium	1984	Korea (South)	2001
Canada	1984, 1997	Luxembourg	1993
Chile	2001	Netherlands	1990, 2003
Czech Republic	2009	Norway	1984, 2003
Denmark	2008	Poland	2009
Finland	1992	Portugal	1989
France	1988	Spain	1988
Germany	1979, 1988, 1996	Sweden	1987, 2007
Greece	1994	Switzerland	1980, 1989
Ireland	1993	United Kingdom	1985, 1997

International Social Security agreements have two main purposes. First, they eliminate dual Social Security cov-

erage, the situation that occurs when a person from one country works in another country and is required to pay Social Security taxes to both countries on the same earnings. Each agreement includes rules that assign a worker's coverage to only one country.

The second goal of the agreement is to help fill gaps in benefit protection for workers who have divided their careers between the United States and another country. Such workers may fail to qualify for Social Security benefits from one or both countries because they have not worked long enough to meet minimum eligibility requirements. Under an agreement, these workers and their family members may qualify for a partial U.S. benefit based on *totalized* (that is, combined) credits from both countries. Similarly, workers may qualify for partial benefits from the foreign country on the basis of totalized credits.

Table 5.M1 shows the number of beneficiaries receiving totalization payments and their average benefits.

Benefit Computation and Automatic Adjustment Provisions

PIA Computation

The primary insurance amount (PIA) is the monthly benefit amount payable to the worker upon initial entitlement at full retirement age (FRA) or upon entitlement to unreduced disability benefits. (FRA is the age at which unreduced retirement benefits may be paid.) The PIA is also the base figure from which monthly benefit amounts are determined for early retirement, delayed retirement, and for the worker's family members or survivors. The PIA is derived from the worker's annual taxable earnings from covered wages and self-employment, averaged over a period that encompasses most of the worker's adult years. Until the late 1970s, the average monthly wage (AMW) was the earnings measure generally used. For workers first eligible for benefits after 1978, average indexed monthly earnings (AIME) have replaced the AMW as the usually applicable earnings measure. The PIA computation based on AIME currently involves the following three steps:

1. Indexing of earnings. The worker's annual taxable earnings after 1950 are updated, or indexed, to reflect the general earnings level in the indexing year—the second calendar year before the year in which the worker is first eligible; that is, first reaches age 62, becomes disabled, or dies. Earnings in years after the indexing year are not indexed; they are counted at their actual value. A worker's earnings for a given year are indexed by multiplying them by the

following ratio (indexing factor): the average wage in the national economy for the indexing year, divided by the corresponding average wage figure for the year to be indexed.

Table 2.A8 shows the indexing factors applicable to the earnings of workers who were first eligible from 1995 through 2010. **Table 2.A9** shows indexed earnings for workers first eligible from 2003 through 2010 who had maximum taxable earnings in each year after 1950. For a detailed description of an AIME computation, see Appendix D, "Computing a Retired-Worker Benefit."

2. Determining AIME. The number of years used in the computation is determined by subtracting the number of dropout years from the number of elapsed years. Elapsed years are the full calendar years between age 21 (or 1950, if later) and the year of first eligibility. Years within an established period of disability may be excluded from elapsed years. Years with the lowest earnings are dropped out of the computation. There are 5 dropout years for retirement and survivor computations and for many disability insurance benefit computations; workers disabled before age 47 have 0 to 4 dropout years (one-fifth the number of elapsed years). If the resulting number of computation years is less than 2, the number is automatically raised to 2. The number of years required for computing retirement benefits is 35 for workers who were born after 1928, unless it is lowered by an established period of disability.

The actual years used in the computation (the *computation years*) are the years of highest indexed earnings after 1950, including any years before age 22 or after age 61 as well as the year of disability or death. AIME is calculated as the sum of indexed earnings in the computation period, divided by the number of months in that period.

Table 2.A10 provides a historical outline of provisions related to AIME and AMW and describes variations in the number of dropout years. **Table 2.A16** describes AMW benefit computations based on the worker's nonindexed earnings after 1950. (Very few people currently being awarded benefits have PIAs computed under the AMW computation method. The method shown in Table 2.A16 is more frequently applicable in earnings recomputations for workers who reached age 62 before 1979.)

3. Computing the PIA. The formula used to compute the PIA from AIME is weighted to provide a higher PIA-

to-AIME ratio for workers with comparatively low earnings. The formula applies declining percentage conversion rates to three AIME brackets. For workers who reach age 62, become disabled, or die in 2010, the formula provides a PIA equal to the sum of

- 90 percent of the first \$761 of AIME, plus
- 32 percent of the next \$3,825 of AIME, plus
- 15 percent of AIME over \$4,586.

The PIA is increased by cost-of-living adjustments (COLAs) beginning with the first year of eligibility. The COLA for 2010 took effect in December 2009.

Table 2.A11 shows the PIA formula and first applicable COLA for workers first eligible in 1979 or later.

The dollar amounts defining the AIME brackets are referred to as *bend points*. These bend points (as described in Table 2.A11) are updated automatically each year in proportion to increases in the national average wage level. This automatic adjustment ensures that benefit levels for successive generations of eligible workers will keep up with rising earnings levels, thereby assuring consistent rates of earnings replacement from one generation of beneficiaries to the next.

The PIA formula applicable to a worker depends on the year of eligibility (or death) rather than on the year benefits are first received. The year of eligibility for retirement benefits is the year the worker attains age 62. For workers born in 1944, the 2006 formula is used and the PIA is increased by COLAs beginning with the one taking effect in December 2006. Subsequent recomputations of the worker's benefit, including additional earnings not originally considered, delayed retirement credits, or additional COLA increases, all refer to the basic computation that originally applied on the basis of the year of eligibility. The FRA for workers born in 1944 is 66 years.

Beginning in June 1982, benefits are rounded to the next lower 10 cents. The final benefit payment is rounded to the lower whole dollar amount (if not already an even dollar). Before June 1982, benefits were paid in 10-cent increments after rounding up to the next dime.

A cost-of-living increase in benefits generally is established each year if the Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W), prepared by the Department of Labor, indicates an increase of at least 0.1 percent (after rounding) between two specified quarters. The arithmetical mean of the CPI-W for July, August, and September in the year of determination is compared with the arithmetical mean of the CPI-W for the later of (a) July, August, and September in the year in

which the last effective cost-of-living increase was established or (b) the 3 months of the calendar quarter in which the effective month of the last general benefit increase occurred. The percentage increase in the CPI-W, rounded to the nearest 0.1 percent, represents the size of the increase in benefits, effective in December of the year in which the determination is made.

Under certain conditions, depending on the size of the combined OASDI trust funds relative to estimated disbursements, the applicability and size of a cost-of-living adjustment may be determined under an alternative method, called the *stabilizer provision*. In no case, however, are benefits reduced below the level of benefits in the year of determination. Historically, this provision has never been triggered.

Table 2.A18 presents a history of provisions relating to the automatic adjustment of benefits, including a description of the stabilizer provision. In addition, the table includes a summary history and description of provisions relating to the annual automatic adjustment of (1) the maximum amount of taxable and creditable earnings, (2) the dollar amount needed to establish a quarter of coverage, (3) the bend points defining the AIME brackets in the PIA formula and the PIA brackets in the maximum family benefit formula, and (4) the exempt amounts under the earnings (retirement) test. All of these adjustments are linked to increases in the level of the national average annual wage, rather than to increases in the CPI. **Table 2.A19** illustrates the cumulative effect of statutory and automatic increases in benefits for workers who have been in benefit status over varying time periods.

Alternative PIA Computation Provisions

Special minimum PIA. Workers with low earnings but steady attachment to the workforce over most of their adult years may qualify for monthly benefits based on the special minimum PIA computation. This computation does not depend on the worker's average earnings but on the number of coverage years—years in which the worker had earnings equal to or above a specified amount. The level of the special minimum PIA is the same for workers having the same number of coverage years, regardless of age or year of first eligibility. Increases in the special minimum PIA are linked to cost-of-living adjustments.

See **Table 2.A12** for additional information on the special minimum PIA.

Windfall Elimination Provision (WEP). The WEP affects workers who receive Social Security benefits

based on their own work and are also entitled to a pension based on noncovered work after 1956. First eligibility for the noncovered pension and for Social Security benefits must be after December 31, 1985, for WEP to apply. WEP reduces the Social Security PIA upon which OASDI benefits are based and affects all benefits paid on that record except those for survivors. The WEP reduction ceases when entitlement to the pension payment ends, the wage earner dies, or the wage earner earns a total of 30 years of substantial Social Security earnings. The WEP reduction amount is limited to no more than one-half the amount of the noncovered pension.

A WEP PIA is generally based on 40 percent of the first bend point instead of 90 percent used for the regular AIME PIA. The maximum amount of the reduction is half the amount of the first bend point for the applicable eligibility year. The maximum reduction for WEP for the 2010 eligibility year is \$380.50. SSA's retirement planner at <http://www.socialsecurity.gov/retire2/index.htm> has a benefit calculator that includes WEP calculations.

Example: A retired worker with a noncovered pension of \$2,000 a month and fewer than 21 years of covered employment attains age 62 in 2010.

Regular PIA, based on AIME of \$1,000.

$$\$761 \times .90 = \$684.90$$

$$\$239 \times .32 = \$76.48$$

$$\text{PIA} = \$761.38 \text{ rounded to } \$761.30$$

WEP PIA, based on AIME of \$1,000.

$$\$761 \times .40 = \$304.40$$

$$\$239 \times .32 = \$76.48$$

$$\text{PIA} = \$380.88 \text{ rounded to } \$380.80$$

If a worker has more than 20 years of substantial covered earnings, the WEP PIA begins to increase. With the 21st year of substantial covered earnings, the first bend point percentage is increased by 5 percentage points. This rate of increase applies for each additional year of substantial covered earnings, through the 30th year of substantial earnings at which point WEP no longer applies. After 23 years of substantial coverage, for example, the first bend point percentage would be 55 percent. Thirty years of substantial earnings would yield a first bend point percentage of 90 percent (the non-WEP percentage of the first bend point).

Examples of pensions subject to WEP are U.S. Civil Service Retirement System annuities, retirement benefits

based on foreign earnings, and state and local government pensions based on noncovered earnings.

Table 2.A11.1 provides more detail about the WEP computation and contains the amounts of substantial earnings for years after 1990. Substantial earnings for earlier years are listed in **Table 2.A12**.

Family maximum provisions. Monthly benefits payable to the worker and family members or to the worker's survivors are subject to a maximum family benefit amount. The family maximum level for retired-worker families or survivor families usually ranges from 150 percent to 188 percent of the worker's PIA. The maximum benefit for disabled-worker families is the smaller of (1) 85 percent of AIME (or 100 percent of the PIA, if larger) or (2) 150 percent of the PIA.

Like the formula for determining the PIA, the maximum family benefit formula applicable to a worker depends on the year of first eligibility (that is, the year of attainment of age 62, onset of disability, or death). Once the worker's maximum family benefit amount for the year of first eligibility is determined, it is updated in line with the COLAs.

For information on family maximum provisions, as described here, see **Table 2.A13** (comparison of family maximums to the PIAs on which they are based) and **Table 2.A14** (disability family maximums). **Table 2.A17** shows the maximum family benefit amounts applicable in cases of first eligibility before 1979.

Benefit Types and Levels

Retired and Disabled Workers

The full retirement age (FRA) is the earliest age at which an unreduced retirement benefit is payable (sometimes referred to as the *normal retirement age*). The age for full retirement benefits is scheduled to rise gradually from age 65 to age 67; the first incremental increase affected workers who reached age 62 in 2000. For workers who reach age 62 in 2005 through 2016, FRA is age 66.

Reduced retirement benefits are available as early as age 62. The monthly rate of reduction from the full retirement benefit (that is, the PIA) is 5/9 of 1 percent a month for the first 36 months immediately preceding FRA. The reduction rate is 5/12 of 1 percent a month for any additional months. The maximum overall reduction for early retirement will rise from 20 percent to 30 percent for those workers who reach age 62 in 2022 and later, when age 67 becomes the FRA. For workers who reach age 62

in 2005 through 2016, the maximum reduction is 25 percent.

Table 2.A17.1 shows the FRA and maximum reduction of retired-worker benefits by year of birth.

If a disabled worker receives a reduced retirement benefit for months before disability entitlement, the disability benefit is reduced by the number of months for which he or she received the reduced benefit.

For insured workers who postpone their retirement beyond FRA, benefits are increased for each month of nonpayment beyond that FRA up to age 70. This increase is called a *delayed retirement credit* and is potentially available for any or all months following attainment of FRA (maximum of 60 months for workers who attained age 65 before 2003). The total credit possible per year for delayed retirement credits is 8 percent for workers who reach age 62 in 2005 or later.

Table 2.A20 shows a history of benefit increases due to delayed retirement.

Spouses and Children of Workers

Spouses receive 50 percent of the worker's PIA (regardless of the worker's actual benefit amount), if the spouse has attained FRA at entitlement to spousal benefits. The spouse of a retired or disabled worker can elect monthly benefits as early as age 62. These benefits are reduced at the rate of 25/36 of 1 percent a month for the first 36 months immediately preceding FRA and 5/12 of 1 percent for each additional month. The maximum overall reduction for early retirement will rise from 25 percent to 35 percent by 2022, when age 67 becomes the FRA for spouses attaining age 62 in that year.

Children of retired or disabled workers are also eligible to receive monthly benefits. The term *child* refers to an unmarried child under age 18, a child aged 18 to 19 attending elementary or secondary school full time, or an adult child aged 18 or older who was disabled before age 22. In addition, young spouses (that is, those under age 62) who care for a worker's entitled child may also be eligible. For purposes of defining young spouses' benefits, the term *child* refers to an entitled child under age 16 or to a child of the worker aged 16 or older and disabled before age 22. Children of retired or disabled workers can receive up to 50 percent of the worker's PIA, as can young spouses. (The benefit of a young spouse is not reduced for age.) Monthly benefits payable to the spouse and children of a retired or disabled worker are limited to a family maximum amount, as discussed earlier.

Benefits are payable to unmarried divorced spouses of retirement age who were married at least 10 years to the worker. A divorced spouse benefit is excluded from family maximum provisions. Divorced spouses aged 62 or older and divorced for 2 or more years (after marriage of 10 or more years) may be independently entitled on the record of the ex-spouse who is not yet entitled to benefits, if the ex-spouse could be entitled to retirement benefits if he or she applied.

Survivors Benefits

Widows and widowers of fully insured workers are eligible for unreduced benefits at FRA. As with retired workers and spouses, widow(er)s' FRA will gradually increase to age 67, but on a different schedule. Widows and widowers can elect reduced monthly benefits at age 60 or, if disabled, as early as age 50. Surviving divorced spouses can also receive benefits if married to the worker for at least 10 years and not remarried before age 60 (age 50 if disabled).

For survivors whose full benefit retirement age is 65, the monthly rate of reduction for the first 60 months immediately preceding FRA is 19/40 of 1 percent of the worker's PIA, with a maximum reduction of 28.5 percent at age 60. For survivors whose FRA is after 65, the amount of reduction for each month prior to FRA is adjusted accordingly to ensure that the maximum reduction at age 60 remains 28.5 percent of the worker's PIA.

Benefits for widows and widowers are increased if the deceased worker delayed receiving retirement benefits beyond the FRA. In these cases, the survivor benefits include any delayed retirement credits the deceased worker earned. Conversely, if the worker had elected early retirement, widow(er)s' benefits are limited for widow(er)s first entitled to survivors benefits at age 62 or later. For these beneficiaries, the benefit is the higher of 82.5 percent of the worker's PIA or the amount the worker would be receiving if still alive. Disabled widow(er)s aged 50 to 60 receive the rate of reduction set for widow(er)s aged 60 (71.5 percent of PIA) regardless of their age at the time of entitlement.

Children of deceased workers and mother and father beneficiaries under FRA are eligible to receive monthly benefits up to 75 percent of the worker's PIA if the worker dies either fully or currently insured. Mother and father beneficiaries must be caring for the worker's entitled child who is either under age 16 or disabled. A dependent parent aged 62 or older is eligible for monthly benefits equal to 82.5 percent of the worker's PIA. When two dependent parents qualify for benefits, the monthly benefit for each is equal to 75 percent of the deceased worker's PIA. Monthly benefits payable to survivors are reduced to conform to the family maximum payable on the deceased

worker's account. Benefits for a surviving divorced spouse, however, do not affect the maximum benefit to the family.

See **Table 2.A20** for more information on the increases in the full (or normal) retirement age for workers. **Table 2.A21** describes age-related reductions for dependent beneficiaries, as does **Table 2.A22** for widow(er)s. Additionally, **Tables 2.A23** and **2.A24** show the history of legislation relating to special monthly benefits payable to certain persons born before January 2, 1900. **Table 2.A25** summarizes the history of certain OASDI benefits other than monthly benefit payments. **Table 2.A26** presents illustrative monthly benefit amounts for selected beneficiary families, based on hypothetical earnings histories representing five different earnings levels. **Table 2.A27** shows minimum and maximum monthly benefits payable to retired workers retiring at age 62 in various years beginning with 1957 (the first full year benefits became available at age 62). **Table 2.A28** shows minimum and maximum monthly benefits payable to retired workers retiring at age 65 in various years beginning with 1940.

Provisions for Railroad Retirement Board Beneficiaries

The OASDI tables do not include a number of persons receiving Railroad Retirement benefits who would be eligible for Social Security benefits had they applied. The reason they have not applied is that receipt of a Social Security benefit would reduce their Railroad Retirement benefit by a like amount.

The Railroad Retirement Act of 1974, effective January 1, 1975, provided that the regular annuity for employees with 10 or more years of railroad service who retired after December 31, 1974, would consist of two components.

- Tier 1. A basic Social Security component equivalent to what would be paid under the Social Security Act on the basis of the employee's combined railroad and nonrailroad service, reduced by the amount of any monthly benefit under OASDI actually paid on the basis of nonrailroad work; and
- Tier 2. A "private pension" component payable over and above the Social Security equivalent, calculated on the basis of the number of years of railroad service.

Public Law 107-90 (the 2001 amendments to the Railroad Retirement Act of 1974), effective January 1, 2002, revised the railroad service work requirement. The railroad service work requirement is 10 or more years of

railroad service or, effective January 1, 2002, at least 5 years of railroad service after December 31, 1995. The two components are unchanged.

Effect of Current Earnings on Benefits

Annual Earnings Test

Individuals may receive Social Security retirement, dependent, or survivor benefits and work at the same time. However, under the law, those benefits could be reduced if earnings exceed certain amounts.

Under the annual earnings test provisions of the Social Security Act, beneficiaries who are younger than full retirement age and have earnings in excess of certain exempt amounts may have all or part of their benefits withheld. The annual earnings test exempt amount for nondisabled beneficiaries is pegged to increases in the average wage. Different rules on earnings apply to beneficiaries who receive disability benefits, and are described in a subsequent section.

For beneficiaries who are younger than FRA throughout the year:

- The earnings test exempt amount is \$14,160 in 2010.
- Benefits are withheld at the rate of \$1 for each \$2 of earnings above the exempt amount.

For beneficiaries who attain FRA in 2010, the annual earnings test is significantly higher.

- This earnings test exempt amount is \$37,680 in 2010. Only earnings before the month of attainment of FRA are counted for purposes of this portion of the annual earnings test.
- Benefits are withheld at the rate of \$1 for every \$3 of earnings above the exempt amount.

Individuals have the option to receive benefits under a monthly earnings test if it is to their advantage to do so. This option is usually exercised in the first year of entitlement, because the monthly test permits payment for some months even if the annual earnings limit is greatly exceeded. Under the monthly test, beneficiaries receive a full monthly benefit for months in which they do not earn an amount equal to more than 1/12 the annual earnings test. The monthly earnings test is applied to the self-employed on the basis of the number of hours worked instead of monthly earnings. Generally, beneficiaries are eligible for the monthly earnings test in only one year.

A foreign work test applies to work outside the United States in employment or self-employment that is not subject to U.S. Social Security taxes. Benefits are withheld

for each month a beneficiary younger than FRA works more than 45 hours.

The earnings test no longer applies beginning with the month a beneficiary attains FRA. Elimination of the earnings test at FRA is effective for taxable years ending after December 31, 1999 (Public Law 106-182). At FRA no benefits are withheld for earnings, regardless of the amount of earnings.

Tables 2.A29 and 2.A29.1 provide historical detail on the retirement test.

Automatic Adjustments for Additional Earnings

When a worker has earnings after filing for Social Security benefits, the additional earnings are credited to the worker's record. The reduction factor and the computation of the PIA could be affected by the additional earnings. These adjustments occur automatically; the worker does not need to request the action.

Adjusted Reduction Factor. The reduction factor is based on all months of entitlement prior to FRA. If a full month or partial month of benefits is withheld because of the earnings test, the reduction factor is automatically adjusted at FRA. For widows and widowers, the automatic adjustments are effective at age 62 and at FRA. This adjustment of the reduction factor results in a higher ongoing monthly benefit. For example, if retirement benefits are claimed 36 months before FRA, a 36-month reduction factor is applied to the PIA. If the earnings test results in no payment of benefits for 6 of those months, the reduction factor is automatically adjusted at FRA, the ongoing reduction factor is changed to 30 months, and benefits are increased retroactively to the month of FRA.

Recomputation. Additional earnings also have the potential to increase the PIA. A recomputation is automatically considered each year when earnings of the insured worker are credited to the record. A recomputation of the PIA is processed if the earnings result in an increase to the PIA of at least \$1.00. The increase is retroactive to January of the year following the year of new earnings. For example, if a beneficiary's PIA is \$955.50 effective December 2009 and the beneficiary had earnings in 2009, a recomputation would be considered for January 2010. After considering all earnings through 2009, if it is found that the PIA has increased to \$976.50 as of January 2010, the recomputation can be allowed because the increase is at least \$1.00 over the December 2009 PIA.

Earnings and Disability Benefits

Beneficiaries entitled on the basis of their own disability—disabled workers, disabled adult children, and disabled widow(er)s—are not subject to the annual earnings test. Substantial earnings by disabled beneficiaries, however, may indicate that they are able to do work that constitutes substantial gainful activity (SGA) and therefore no longer meet the requirements for disability benefits. Although other factors are considered, numerical earnings thresholds are used to evaluate SGA. Disabled beneficiaries must report all earnings to SSA for timely evaluation of SGA.

Through 2000, SSA periodically changed the earnings amount for which a nonblind disabled individual was considered to be engaged in SGA. Effective January 1, 2001, SGA amounts are automatically adjusted annually on the basis of increases in the national average wage index. The SGA amount for nonblind individuals in calendar year 2010 is \$1,000 per month.

A different definition of SGA applies to blind individuals receiving Social Security disability benefits. Increases in the SGA amount for blind individuals have been pegged to increases in the national average wage index since 1978. The SGA level for blind individuals in calendar year 2010 is \$1,640 per month.

A 9-month trial work period allows beneficiaries who are still disabled to test their ability to work. During that period, beneficiaries may earn any amount and still receive full benefits. After the individual completes 9 trial work months, the SGA level is used to determine whether earnings are substantial.

Table 2.A30 provides related historical data on disability program earnings guidelines.

Government Pension Offset

A pension from a federal, state, or local government based on work that was not covered by Social Security could reduce the amount of a spouse's or widow's or widower's Social Security benefits. Social Security benefits are reduced (offset) by two-thirds of the government pension if the pension is based on noncovered work by the spouse, widow, or widower. For example, for a monthly civil service pension of \$600, two-thirds, or \$400, would offset a Social Security spousal benefit. An individual eligible for a Social Security spousal benefit of \$500 would receive \$100 per month from Social Security ($\$500 - \$400 = \$100$). The intent of the Government Pension Offset provision is to ensure that, when determining the amount of spousal benefits, government employees who do not pay Social Security taxes are treated in a manner

similar to those who work in the private sector and pay Social Security taxes. The law requires that Social Security spousal benefits be offset dollar for dollar by the amount of a spouse's own Social Security retirement benefit. For example, if a woman worked and earned her own \$600 monthly Social Security retired-worker benefit but was also eligible for a \$500 spouse's benefit on her husband's Social Security record, the spousal benefit would not be paid because it would be offset by her own Social Security benefit.

Exceptions to the Government Pension Offset could apply if some of the work on which the pension is based was in covered employment. Specific rules apply depending on the employer and on the dates of employment. There are also exemptions for those who were eligible for the government pension before December 1982 or before July 1983, if specific criteria are met.

Taxation of Benefits

Up to 85 percent of Social Security benefits may be subject to federal income tax depending on the beneficiary's income, marital status, and filing status. The definition of income for this provision is as follows: adjusted gross income (before Social Security or Railroad Retirement benefits are considered), plus tax-exempt interest income, with further modification of adjusted gross income in some cases involving certain tax provisions of limited applicability among the beneficiary population, plus half the Social Security and Tier 1 Railroad Retirement benefits.

For married beneficiaries filing jointly with adjusted gross income (as defined above) that is \$32,000 a year or less, no Social Security benefits are subject to taxation. If their adjusted gross income exceeds \$32,000 but is \$44,000 or less, up to 50 percent of the Social Security benefit is subject to income tax. If their income exceeds \$44,000, up to 85 percent of the Social Security benefit is subject to income tax. For married beneficiaries filing separately who lived together any time during the tax year, there is no minimum threshold. Up to 85 percent of the Social Security benefit is subject to income tax.

For individuals in all other filing categories (single, head of household, qualifying widow(er), and married filing separately but who lived apart from their spouse for the entire year), the income threshold is \$25,000. Generally, up to 50 percent of benefits are taxable for income between \$25,001 and \$34,000, and up to 85 percent of benefits are taxable for income exceeding \$34,000.

Like all matters dealing with tax liability, taxation of Social Security benefits falls under the jurisdiction of the Internal Revenue Service.

Table 2.A31 shows the history of provisions related to taxation of Social Security benefits. **Table 2.A32** offers examples to illustrate when benefits are taxable, and the amount subject to taxation.

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Supplemental Security Income

Program Overview

The Supplemental Security Income (SSI) program provides income support to persons aged 65 or older, blind or disabled adults, and blind or disabled children. Eligibility requirements and federal payment standards are nationally uniform. The 2010 federal SSI benefit rate for an individual living in his or her own household and with no other countable income is \$674 monthly; for a couple (with both husband and wife eligible), the SSI benefit rate is \$1,011 monthly.

Payments under SSI began in January 1974. SSI replaced the former federal-state adult assistance programs in the 50 states and the District of Columbia. Under SSI each eligible person is provided a monthly cash payment based on a statutory federal benefit rate. Since 1975, these rates have been increased by the same percentage as the cost-of-living increases in OASDI benefits. If an individual or couple is living in another person's household and is receiving both food and shelter from the person in whose household they are living, the federal benefit rate is reduced by one-third. This is done instead of determining the actual dollar value of the in-kind support and maintenance.

For institutionalized persons, the eligibility requirements and payment standards depend on the type of institution. With some exceptions, inmates of public institutions are ineligible for SSI. For persons institutionalized for a complete calendar month, a maximum federal SSI payment of \$30 per month applies where (1) the institution receives a substantial part of the cost of the person's care from the Medicaid program, or (2) the institution receives payments from private health insurance on behalf of a recipient under age 18. Other eligible persons in institutions may receive up to the full federal benefit rate.

The federal payment is based on the individual's countable income. The first \$20 in monthly OASDI benefits or other earned or unearned income is not counted. Also excluded is \$65 of monthly earnings plus one-half of any earnings above \$65. For example, a person living in his or her own household, whose sole income is a \$200 monthly OASDI benefit, would receive \$494 in federal SSI payments

$$\$674 - (\$200 - \$20) = (\$674 - \$180) = \$494.$$

A person whose income consists of \$500 in gross monthly earnings would receive \$466.50 in federal SSI payments

$$((\$500 - \$85) / 2) = \$207.50 \text{ countable earnings}$$

$$\text{FBR } \$674 - \$207.50 = \$466.50 \text{ federal SSI}$$

Individuals generally are not eligible for SSI if they have resources in excess of \$2,000 (or \$3,000 for a couple). Certain resources are excluded, most commonly a home, an automobile, and household goods and personal effects. States have the option to supplement the federal SSI payment for all or selected categories of persons, regardless of previous state program eligibility.

SSI: History Of Provisions

Basic Eligibility Requirements

1972 (Public Law 92-603, enacted October 30). An individual may qualify for payments on the basis of age, blindness, or disability.

Aged: Any person aged 65 or older.

Blind: Any person with 20/200 or less vision in the better eye with the use of correcting lenses, or with tunnel vision of 20 degrees or less. An individual transferred from a state Aid to the Blind program is eligible if he/she received such state aid in December 1973 and continues to meet the October 1972 state definition of blindness.

Disabled: Any person unable to engage in any substantial gainful activity (SGA) by reason of any medically determinable physical or mental impairment expected to result in death or that has lasted or can be expected to last for a continuous period of at least 12 months. For a child under age 18, eligibility is based on disability of severity comparable with that of an adult. An individual transferred from a state Aid to the Permanently and Totally Disabled (APTD) program to SSI is also eligible if he/she received such state aid in December 1973 and continues to meet the October 1972 state definition of disability.

1973 (Public Law 93-233, enacted December 31). Only persons who had received APTD before July 1973 and were on the rolls in December 1973 may receive SSI on the basis of the state definition of disability; those who became eligible for state aid from July to December 1973 must meet the federal definition of disability.

1980 (Public Law 96-265, enacted June 9). A disabled recipient who loses federal SSI eligibility because of earnings at the SGA level may continue to receive a special benefit under section 1619 and retain eligibility for Medicaid under Title XIX of the Social Security Act. This special benefit status may continue as long as the recipient has the disabling impairment and meets all nondisability SSI eligibility criteria. States have the option of supplementing this special benefit.

This provision of the law was in effect from January 1, 1981, through December 31, 1983. Beginning in January 1984, under a 1-year demonstration project, this provision was continued for persons already eligible for either regular SSI payments or special monthly benefits.

1984 (Public Law 98-460, enacted October 9). The special benefit and Medicaid provisions of the 1980 legislation were extended through June 30, 1987 (retroactive to January 1, 1984).

1986 (Public Law 99-643, enacted November 10). The special benefit and Medicaid provisions of the 1980 amendments are made permanent. The provisions were amended effective July 1, 1987, with significant modifications to simplify administration and to allow free movement between regular SSI disability payments and either the special cash benefit or Medicaid eligibility under section 1619. The distinction between a disabled person eligible for regular SSI payments and one eligible for 1619(a) is that the latter has several months with gross earnings above the SGA level. Previously, section 1619(a) status required completion of a trial work period and the determination that the work was SGA.

1996 (Public Law 104-193, enacted August 22). For individuals under age 18, the “comparable severity” standard is eliminated and replaced with a requirement that a child be considered disabled if he/she has a medically determinable impairment that results in “marked and severe functional limitations,” and meets the existing statutory duration requirement. The law also eliminates references to “maladaptive behaviors” in the Listing of Impairments for children, and discontinues the use of individualized functional assessments for children.

SSI eligibility is prohibited for an individual in any month during which such an individual is a fugitive felon, fleeing prosecution, or violating state or federal conditions of probation or parole. In addition, SSI eligibility is prohibited for 10 years for those convicted of fraudulently claiming residence to obtain benefits simultaneously in two or more states.¹

2006 (Public Law 109-171, enacted February 8). Requires the Commissioner to conduct reviews of a specific percentage of SSI initial disability and blindness cases involving individuals aged 18 or older that are allowed by State Disability Determination Service (DDS) agencies. The provision is phased in as follows—for fiscal year 2006, the Commissioner is required to review 20 percent of DDS allowances; in

fiscal year 2007, the requirement is 40 percent; and, for fiscal years 2008 and thereafter, 50 percent of all DDS allowances are required to be reviewed. These reviews are to be made before the allowance decision is implemented.

Other Eligibility Provisions

Citizenship and Residence

1972 (Public Law 92-603, enacted October 30). The individual must reside within one of the 50 states or the District of Columbia and be a citizen or an alien lawfully admitted for permanent residence or permanently residing in the United States under color of law. Persons living outside the United States for an entire calendar month lose their eligibility for such a month.

1976 (Public Law 94-241, enacted March 24). Eligibility for SSI is extended to residents of the Northern Mariana Islands, effective January 9, 1978.

1980 (Public Law 96-265, enacted June 9). The income and resources of the immigration sponsors of aliens applying for SSI are considered in determining eligibility for and the amount of payment. After allowances for the needs of the sponsor and his/her family, the remainder is deemed available for the support of the alien applicant for a 3-year period after admission to the United States for permanent residence. This provision does not apply to those who become blind or disabled after admission, to refugees, or to persons granted political asylum. (See section “Deeming of Income and Resources” for subsequent changes to sponsor-to-alien deeming provisions.)

1989 (Public Law 101-239, enacted December 19). SSI eligibility is continued for a disabled or blind child who was receiving SSI benefits while living in the United States and is now living with a parent who is a member of the U.S. Armed Forces assigned to permanent duty ashore outside the United States, but not where the parent is stationed in Puerto Rico or the territories and possessions of the United States.

1993 (Public Law 103-66, enacted August 10). Above provision made applicable where the parent is a member of the U.S. Armed Forces and stationed in Puerto Rico or the territories and possessions of the United States.

1996 (Public Law 104-193, enacted August 22). Prohibits SSI eligibility for anyone who is not a U.S. citizen or national. Aliens are not eligible unless they meet the definition of “qualified alien” and the criteria for certain exception categories, such as lawful permanent residents who earn or can be credited with 40 qualifying quarters of earnings, certain refugee categories that may be granted time-limited eligibility, or active-duty U.S. military or veterans and their spouses and children. For aliens ineligible under the new stan-

1. This last provision was repealed in 1999 by Public Law 106-169 and replaced with a provision providing for nonpayment of benefits for up to 24 months for knowingly making false or misleading statements regarding material facts.

dards who were receiving SSI as of August 22, 1996, extends eligibility 1 year from enactment.

(Public Law 104-208, enacted September 30). Amends Public Law 104-193 to add to the list of “qualified aliens” certain noncitizens (and their children) who have been battered or subjected to extreme cruelty by a spouse or parent or a member of the spouse’s or parent’s family living in the same household.

1997 (Public Law 105-18, enacted June 12). Extends eligibility for aliens receiving SSI as of August 22, 1996, until September 30, 1997, for those found ineligible under the new alien standards of Public Law 104-193.

(Public Law 105-33, enacted August 5). Further amends Public Law 104-193 to add Cuban and Haitian entrants, and the child of a parent who has been battered or subjected to extreme cruelty, to the list of qualified aliens. Provides that Cuban and Haitian entrants and Amerasian immigrants qualify for time-limited eligibility, and increases the time limit from 5 to 7 years for all time-limited categories. Additional exceptions are added for qualified aliens: (1) lawfully residing in the United States and receiving SSI benefits on August 22, 1996; and (2) lawfully residing in the United States on August 22, 1996, and meeting the definition of blind or disabled in the Social Security Act.

Certain noncitizen American Indians are excepted from the alien nonpayment provisions of Public Law 104-193.

Extends eligibility for “nonqualified aliens” receiving SSI as of August 22, 1996, until September 30, 1998.

1998 (Public Law 105-306, enacted October 28). Permanently extends eligibility of all remaining “nonqualified aliens” who were receiving SSI benefits when Public Law 104-193 was enacted on August 22, 1996.

2000 (Public Law 106-386, enacted October 28). Noncitizens, regardless of their immigration status, may be eligible for SSI to the same extent as refugees, if they are determined to be victims of “severe forms of trafficking in persons.”

2004 (Public Law 108-203, enacted March 2). Extends SSI eligibility to blind or disabled children who are U.S. citizens living with a parent assigned to permanent U.S. military duty outside of the United States and who were not receiving SSI benefits when living in the United States. Previously, only blind or disabled children who received an SSI benefit for the month before the parent reported for permanent duty abroad were eligible. Effective April 2004 for applications filed after enactment.

2007 (Public Law 110-161, enacted December 26). Provides certain Iraqi and Afghan aliens with special

immigrant status, as described in section 101(a)(27) of the Immigration and Nationality Act. As special immigrants, these Iraqi and Afghan aliens are eligible for resettlement assistance, entitlement programs, and other benefits available to refugees admitted under section 207 of such Act (admission of refugees in emergency situations) for a period not to exceed 6 months.

2008 (Public Law 110-181, enacted January 28). Provides certain Iraqi aliens who have provided service to the United States with special immigrant status, as described in section 101(a)(27) of the Immigration and Nationality Act. As special immigrants, these Iraqis are eligible for resettlement assistance, entitlement programs, and other benefits available to refugees admitted under section 207 of such Act (admission of refugees in emergency situations) for a period not to exceed 8 months.

(Public Law 110-328, enacted September 30). Extends the 7-year SSI eligibility period for certain refugees, asylees, and other humanitarian immigrants (including victims of human trafficking) to 9 years for the period October 1, 2008 through September 30, 2011. For those with naturalization applications pending or awaiting the swearing-in ceremony, the eligibility period is extended through September 30, 2011. Also applies to the noncitizens whose SSI had previously ceased due to the expiration of the 7-year period. For these noncitizens, SSI benefits will be paid for months in the period October 1, 2008 through September 30, 2011, for the duration of the noncitizen’s reestablished eligibility.

2009 (Public Law 111-118, enacted December 19). Eliminates the 8-month time limit on SSI eligibility for certain Iraqi and Afghan refugees who have provided service to the United States. The time-limited eligibility for these individuals is now 7 years, the same period applicable to other humanitarian refugees.

Other Benefits

1980 (Public Law 96-272, enacted June 17). SSI applicants and recipients are not required as a condition of eligibility to elect to receive Veterans Administration pensions under the Veterans and Survivors’ Pension Improvement Act of 1978 if the state of residence lacks a medically needy program under Title XIX.

Drug Addiction and Alcoholism (DA&A)

1972 (Public Law 92-603, enacted October 30). Any disabled individual who has been medically determined to be an alcoholic or drug addict must accept appropriate treatment, if available, in an approved facility

and demonstrate compliance with conditions and requirements for treatment.

SSI payments are required to be made through a representative payee—another person or public or private agency designated by SSA to manage the recipient's benefit on his/her behalf.

1994 (Public Law 103-296, enacted August 15). Any individual who is receiving SSI based on a disability where drug addiction or alcoholism is a contributing factor material to the finding of disability must comply with the DA&A treatment requirements. The individual must accept appropriate treatment when it is available and comply with the conditions and terms of treatment. Instances of noncompliance with the requirements result in progressively longer payment suspensions. Before payments can resume, the individual must demonstrate compliance for specific periods; 2 months, 3 months, and 6 months, respectively, for the first, second, third, and subsequent instances of noncompliance. An individual who is not in compliance with the DA&A treatment requirements for 12 consecutive months shall not be eligible for payments; however, this does not prevent such individuals from reapplying and again becoming eligible for payments.

SSI disability payments based on DA&A are also limited to a total of 36 benefit months (beginning March 1995) regardless of whether appropriate treatment is available. Months for which benefits are not due and received do not count toward the 36-month limit.

Payments based on DA&A must be made to a representative payee. Preference is required to be given to community based nonprofit social service agencies and federal, state, or local government agencies in representative payee selection. These agencies when serving as payees for individuals receiving payments based on DA&A may retain the lesser of 10 percent of the monthly benefit or \$50 (adjusted annually after 1995 by the Consumer Price Index [CPI]) as compensation for their services.

Establishment of one or more referral and monitoring agencies for each state is required.

1996 (Public Law 104-121, enacted March 29). An individual is not considered disabled if DA&A is a contributing factor material to a finding of disability.

Applies DA&A representative payee requirements enacted under Public Law 103-296 to disabled SSI recipients who have a DA&A condition and are incapable of managing their benefits. In addition, these recipients shall be referred to the appropriate state agency administering the state plan for substance abuse treatment.

Institutionalization

1972 (Public Law 92-603, enacted October 30). An individual who is an inmate of a public institution is ineligible for SSI payments unless the institution is a facility approved for Medicaid payments and is receiving such payments on behalf of the person. Under *regulations*, the Medicaid payment must represent more than 50 percent of the cost of services provided by the facility to the individual.

1976 (Public Law 94-566, enacted October 20). An inmate of a publicly operated community residence serving no more than 16 persons may, if otherwise eligible, receive SSI.

1983 (Public Law 98-21, enacted April 20). Payments may be made to persons who are residents of public emergency shelters for the homeless for a period of up to 3 months in any 12-month period.

1986 (Public Law 99-643, enacted November 10). Effective July 1, 1987, disabled or blind recipients who were receiving special SSI payments or had special SSI recipient status under section 1619 in the month preceding the first full month of institutionalization, may receive payments based on the full federal benefit rate for the initial 2 full months of institutionalization, if they reside in certain public medical, psychiatric, or Medicaid facilities or in private Medicaid facilities.

1987 (Public Law 100-203, enacted December 22). Effective January 1, 1988, payments may be made to persons who are residents of public emergency shelters for the homeless, for up to 6 months in a 9-month period.

Effective July 1, 1988, continued SSI payments for up to 3 months are permitted, at the rate that was applicable in the month prior to the first full month of institutionalization, for individuals whose expected institutional stay on admission is not likely to exceed 3 months, as certified by a physician, and for whom the receipt of payments is necessary to maintain living arrangements to which they may return.

1996 (Public Law 104-193, enacted August 22). Effective December 1996, institutionalized children under age 18 whose private health insurance is making payments to the institution may receive no more than \$30 per month in federal SSI.

2009 (Public Law 111-115, enacted December 15). Prohibits the payment of any retroactive SSI benefits to individuals while they are in prison, are in violation of conditions of their parole or probation, or are fleeing to avoid prosecution for a felony or a crime punishable by sentence of more than 1 year. These retroactive benefits will not be paid until the beneficiary is no longer a prisoner, probation or parole violator, or fugitive felon.

Vocational Rehabilitation (VR) and Treatment

1972 (Public Law 92-603, enacted October 30). Blind or disabled individuals receiving federal SSI benefits who are under age 65 must be referred to the state agency providing services under the Vocational Rehabilitation Act and must accept the services offered. States are reimbursed for the cost of services.

1976 (Public Law 94-566, enacted October 20). Blind or disabled children under age 16 must be referred to the state agency administering crippled children's services or to another agency designated by the state. States are reimbursed for the cost of services.

Of funds provided for these services, at least 90 percent must be used for children under age 6 or for those who have never attended public schools.

1980 (Public Law 96-265, enacted June 9). Disabled SSI recipients who medically recover while enrolled in approved VR programs of state VR agencies may continue to receive benefits during their participation in such programs if the Commissioner of Social Security determines that continuation in the program will increase the probability that they leave the rolls permanently.

1981 (Public Law 97-35, enacted August 13). Funding no longer provided under Title XVI for medical, social, developmental, and rehabilitative services to disabled or blind children.

Reimbursement for the cost of rehabilitation services will only be made if the services result in the recipient's return to work for a continuous period of 9 months. The work must be at the SGA earnings level.

1984 (Public Law 98-460, enacted October 9). Authorizes the reimbursement of states for the cost of VR services provided to individuals who (1) continue to receive benefits after medical recovery because they are participating in a state VR program or (2) refuse, without good cause, to continue in or cooperate with the VR program in which they had been participating.

1987 (Public Law 100-203, enacted December 22). Extends the provision for continuation of payments to disabled SSI recipients who have medically recovered while enrolled in an approved VR program to include blind SSI recipients.

1990 (Public Law 101-508, enacted November 5). Reimbursement authorized for the cost of VR services provided in months in which the individual was not receiving federal SSI payments, if

- SSI recipient status for Medicaid eligibility purposes was retained under work incentive provisions, or

- Benefits were suspended² (for a reason other than cessation of disability or blindness), or
- Federally administered state supplementation was received.

Extends benefit continuation provision to disabled SSI recipients who medically recover while participating in a nonstate VR program.

1999 (Public Law 106-170, enacted December 17). Establishes a Ticket to Work and Self-Sufficiency program that will provide SSI (and OASDI) disability beneficiaries with a ticket that can be used to obtain VR services, employment services, or other support services, from an employment network (EN) of their choice.

An EN chooses one of the two EN payment options at the time it submits an application to SSA to become an EN. The chosen payment system will apply to all beneficiaries served. An EN can elect to receive payment under the

- Outcome payment system, under which it can receive payment for up to 60 outcome payment months; or
- Outcome-milestone payment system, under which it can receive payment for up to four milestones in addition to outcome payments. These milestones must occur before the EN enters the first month for which it is eligible for an outcome payment. Four milestone payments plus 60 months of reduced outcome payments equal 85 percent of the total that would be available if the EN chose the outcome payment system.

The four milestones are based on gross earnings exceeding the SGA level for specified months. An outcome payment month is any month in which SSA does not pay any federal disability cash benefits to a beneficiary because of work or earnings.

Also eliminates the requirement that blind or disabled SSI recipients aged 16 through 64 be referred to the state VR agency and accept the services offered.

Continuing Disability Reviews and Eligibility Redeterminations

1994 (Public Law 103-296, enacted August 15). During each of fiscal years 1996, 1997, and 1998, requires SSA to conduct continuing disability reviews (CDRs) on a minimum of 100,000 SSI recipients. In addition, during the same period, requires SSA to redetermine the SSI eligibility of at least one-third of all child SSI recipients who reach age 18 after April 1995 during the 1-year period following attainment of age 18.

2. Recipients who have lost eligibility for SSI benefits for fewer than 13 consecutive months are in suspended payment status.

Redeterminations for persons turning age 18 could count toward the 100,000 CDR requirement.

1996 (Public Law 104-193, enacted August 22). Repeals the requirement that SSA redetermine the eligibility of at least one-third of all child SSI recipients who reach age 18 after April 1995 during the 1-year period following attainment of age 18.

Requires a CDR

- At least once every 3 years for SSI recipients under age 18 who are eligible by reason of an impairment that is likely to improve, and
- Not later than 12 months after birth for recipients whose low birth weight is a contributing factor material to the determination of their disability.

Requires eligibility redetermination for all child SSI recipients eligible for the month before the month in which they attain age 18.

Requires redetermination of eligibility for children considered disabled based on an individual functional assessment and/or consideration of maladaptive behavior.

Requires the representative payee of a child SSI recipient whose continuing eligibility is being reviewed to present evidence that the recipient is receiving treatment that is considered medically necessary and available for the condition which was the basis for providing SSI benefits.

1997 (Public Law 105-33, enacted August 5). Modifies provision of Public Law 104-193 to extend from 12 to 18 months the period for redetermining the disability of children under age 18 under the new childhood disability standard.

Modifies provision of Public Law 104-193 to permit SSA to schedule a CDR for a disabled child for whom low birth weight is a contributing factor material to the determination of disability, at a date after the child's first birthday if the Commissioner determines the impairment is not expected to improve within 12 months of the child's birth.

Modifies provision of Public Law 104-193 to authorize SSA to make redeterminations of disabled childhood recipients who attain age 18, more than 1 year after the date such recipient attains age 18.

1999 (Public Law 106-170, enacted December 17). Prohibits the initiation of a CDR during the period that a recipient is "using a ticket" under the Ticket to Work program.

Deeming of Income and Resources

1972 (Public Law 92-603, enacted October 30). Deeming occurs when the income and resources of certain

family members living in the same household with the SSI recipient are considered in determining the amount of the SSI payment. These family members are the ineligible spouse of an adult recipient and the ineligible parents of a child recipient under age 21.

After deduction of personal allocations for the spouse (or parents) and for ineligible children in the home, and after application of income exclusions, any remaining income of the spouse (or parents) is added to the income of the eligible person.

1980 (Public Law 96-265, enacted June 9). Children aged 18 or older are not subject to parental deeming.

Sponsor's income and resources deemed to an alien for 3 years.

1989 (Public Law 101-239, enacted December 19). Disabled children receiving home care services under state Medicaid programs, who are ineligible for SSI because of deeming of parental income, and who received SSI benefits limited to \$30 while in a medical treatment facility, may receive the \$30 monthly allowance that would be payable if the recipient were institutionalized.

1993 (Public Law 103-152, enacted November 24). Sponsor-to-alien deeming period extended from 3 years to 5 years, effective January 1, 1994, through September 30, 1996.

Considers an ineligible spouse or parent who is absent from the household because of active military service to be a member of the household for deeming purposes.

1996 (Public Law 104-193, enacted August 22). Deeming of income and resources from an immigration sponsor to a noncitizen continues until citizenship, with exceptions for those who earn, or can be credited with, 40 qualifying quarters of earnings. Effective for those whose sponsor signs a new legally enforceable affidavit of support.

(Public Law 104-208, enacted September 30). Amends Public Law 104-193 to add two exceptions to the sponsor-to-alien deeming:

- Provides that if the noncitizen is indigent and would be unable to obtain food and shelter without SSI benefits even after receiving support from the sponsor, then only the amount of income and resources actually provided by the sponsor will be counted for a 12-month period after a determination of indigence; and
- Provides that in certain cases, deeming would not apply for a 12-month period (with some options for extension) if the noncitizen (or his/her children) has been battered or subjected to extreme cruelty by family members.

1997 (Public Law 105-33, enacted August 5). Amends Public Law 104-208 to add an additional exception to sponsor-to-alien deeming when the parent of a non-citizen has been battered or subjected to extreme cruelty by family members.

2006 (Public Law 109-163, enacted January 6). Provides that individuals who were made ineligible for SSI because of their spouses or parents being called to active military duty would not have to file a new application for SSI benefits if they again could be eligible for benefits before the end of 24 consecutive months of ineligibility.

Federal Benefit Payments

Federal Benefit Rates

Basic benefit standards are used in computing the amount of federal SSI payments. Benefit levels differ for individuals and couples living in households and for persons in Medicaid institutions. Individuals or couples living in their own households receive the full federal benefit. If an individual or couple is living in another person's household and receiving support and maintenance there, the federal benefit is reduced by one-third. The federal benefit rates for persons in households are increased annually to reflect increases in the cost of living. Legislation affecting the level of federal benefit rates since the inception of the SSI program are summarized in Table 2.B1.

Windfall Offset

1980 (Public Law 96-265, enacted June 9). Requires an offset (by reducing retroactive Social Security benefits) for persons whose initial OASDI payment is retroactive, to equalize total benefits with those if paid when regularly due.

1984 (Public Law 98-617, enacted November 8). Expands offset provision to allow for reduction of retroactive SSI benefits and to apply in cases of OASDI benefit reinstatement.

Proration of Benefit

1982 (Public Law 97-248, enacted September 3). Benefit for first month of eligibility to be prorated by the number of days in the month for which an application has been filed and there is eligibility.

1996 (Public Law 104-193, enacted August 22). Changes the effective date of an SSI application to the first day of the month following the date on which the application was filed or on which the individual first becomes eligible, whichever is later. This, in effect, eliminates prorated payments in initial claims.

Retrospective Monthly Accounting

1981 (Public Law 97-35, enacted August 13). Changes the method of computing the SSI benefit to one under which the benefit amount is computed on a monthly basis and is based on income and other characteristics in the previous (or second previous) month.

1984 (Public Law 98-369, enacted July 18). Changes the method of computing the SSI benefit to persons receiving Title II payments. The effect of the increased Title II income at the time of the cost-of-living increase is not delayed as it otherwise would be.

1987 (Public Law 100-203, enacted December 22). Provides an exception to retrospective monthly accounting so that amounts received under Aid to Families with Dependent Children (AFDC), foster care, refugee cash assistance, Cuban-Haitian entrant assistance, or general and child welfare assistance provided by the Bureau of Indian Affairs are counted only in the month received.

1993 (Public Law 103-66, enacted August 10). Changes the method of computing the SSI benefit to persons receiving the value of the one-third reduction. The effect of the increased value at the time of the cost-of-living increase is not delayed as it otherwise would be. Effective January 1995.

2004 (Public Law 108-203, enacted March 2). Eliminates triple counting of one-time, nonrecurring income by providing that this income will be counted only for the month that the income is received and not for any other month during the transition to retrospective monthly accounting during the first 3 months of an individual's SSI eligibility. Effective April 2005.

Uncashed Checks

1981 (Public Law 97-35, enacted August 13). States that have federally administered supplements are to be credited their share of SSI checks that remain unnegotiated for 180 days.

1987 (Public Law 100-86, enacted August 10). SSI checks now unnegotiable after 1 year. States are credited their share of SSI checks after 1 year rather than 180 days.

Rounding of Payment Amounts

1982 (Public Law 97-248, enacted September 3). Cost-of-living adjustments in the federal SSI benefit and income eligibility levels are to be rounded to the next lower whole dollar, after the adjustment is calculated. Subsequent cost-of-living adjustments will be calculated on the previous year's benefit standard before rounding.

Penalties Resulting in Nonpayment of Benefits for False or Misleading Statements

1999 (Public Law 106-169, enacted December 14). Provides for the nonpayment of OASDI and SSI benefits (6, 12, and 24 months, respectively, for the first, second, and third or subsequent violations) for individuals found to have knowingly made a false or misleading statement of material fact for use in determining eligibility for benefits.

2004 (Public Law 108-203, enacted March 2). Expands the administrative sanction of nonpayment of benefits to situations in which an individual has failed to disclose material information, if the person knew or should have known that such failure was misleading.

Authorizes federal courts to order a defendant convicted of defrauding Social Security, Special Veterans' Benefits, or SSI to make restitution to SSA. Restitution funds would be deposited to the trust funds or General Fund of the Treasury, as appropriate. Effective with respect to violations occurring on or after the date of enactment.

Installment Payments

1996 (Public Law 104-193, enacted August 22). Establishes a schedule for paying retroactive SSI benefit amounts that exceed 12 times the federal benefit rate (FBR) plus the state supplement level. Payments would be made at 6-month intervals:

- The first installment would be 12 times the FBR plus any federally administered state supplement.
- Any remaining retroactive benefits would be paid in a second installment (not to exceed the first payment amount).
- All remaining retroactive benefits would be paid in the third installment.

Provides that where an underpaid individual has incurred debts to provide for food, clothing, or shelter, has expenses for disability-related items and services that exceed the installment amount, or has entered into a contract to purchase a home, the installment payment would be increased by the amount needed to cover those debts, expenses, and obligations.

Provides that full retroactive payments be paid to an individual who is terminally ill or, if currently ineligible, is likely to remain so for the next 12 months.

2006 (Public Law 109-171, enacted February 8). Requires that past-due monthly SSI benefits that exceed three times the maximum monthly benefit (federal benefit rate plus state supplementary payment amount, if any) payable to the individual be paid in up to three installment payments, 6 months apart. Also, limits the amount of the first two installment

payments to three times the maximum monthly benefit. All remaining benefits due are to be paid in the third installment. As under current law, the amounts of the installment payments may be increased in certain cases, such as those in which the individual has outstanding debt relating to food, clothing, or shelter, or has necessary medical needs. Effective 3 months after enactment.

Exclusions from Income

General Exclusions

1972 (Public Law 92-603, enacted October 30). The first \$60 of earned or unearned income per calendar quarter for an individual or couple; the next \$195 and one-half the remainder of quarterly earned income. Unearned income includes Social Security benefits, other government or private pensions, veterans' benefits, and workers' compensation.

1981 (Public Law 97-35, enacted August 13). The first \$20 of earned or unearned income per month for an individual or couple; the next \$65 and one-half the remainder of monthly earned income. Unearned income includes Social Security benefits, other government or private pensions, veterans' benefits, and workers' compensation.

2000 (Public Law 106-554, enacted December 21). Earnings of persons defined as Social Security statutory employees are treated as self-employment income for SSI purposes.

Special Exclusions

1972 (Public Law 92-603, enacted October 30). Any amount of tax rebate issued to an individual by any public agency that is based on either real property or food purchase taxes.

Grants, scholarships, and fellowships used to pay tuition and fees at an educational institution.

Income required for achieving an approved self-support plan for blind or disabled persons.

Work expenses of blind persons.

For blind persons transferred from state programs to SSI, income exclusions equal to the maximum amount permitted as of October 1972 under the state programs.

Irregularly or infrequently received income totaling \$60 or less of unearned income and \$30 of earned income in a calendar quarter.

Payment for foster care of ineligible child residing in recipient's home through placement by a public or private nonprofit child care agency.

One-third of any payment received from an absent parent for the support of a child eligible for SSI.

Certain earnings of a blind or disabled child under age 22 regularly attending an educational institution.

State or local government cash payments based on need and designed to supplement SSI payments.

1976 (Public Law 94-331, enacted June 30). Disaster assistance from income for 9 months and application of one-third reduction for 6 months for certain victims of disasters occurring between January 1, 1976, and December 31, 1976.

(Public Law 94-566, enacted October 20). Any assistance based on need (including vendor payments) made to or on behalf of SSI recipients, which is paid and wholly funded by state or local governments.

The value of assistance provided under certain federal housing programs.

1977 (Public Law 95-113, enacted September 29). Food stamps, federally donated food, and the value of free or reduced price food for women and children under the Child Nutrition Act and National School Lunch Act.

(Public Law 95-171, enacted November 12). Provisions excluding support and maintenance under the Disaster Relief and Emergency Assistance Act of 1974 extended on a permanent basis. Effective January 1, 1978.

1980 (Public Law 96-222, enacted April 1). Earned income tax credit treated as earned income (temporarily excluded from 1975 through 1980).

(Public Law 96-265, enacted June 9). Remunerations received in sheltered workshops and work activity centers are considered earned income and qualify for earned income exclusions.

Impairment-related work expenses paid by the individual (including cost for attendant care, medical equipment, drugs, and services necessary to control an impairment) are deducted from earnings when determining if an individual is engaging in SGA. Impairment-related work expenses are excluded in calculating income for benefit purposes if initial eligibility for benefits exists on the basis of countable income without applying this exclusion.

1981 (Public Law 97-35, enacted August 13). Modifies provision under which irregularly or infrequently received income is excluded to conform to change from quarterly to monthly accounting; amounts excludable: \$20 or less of unearned income and \$10 of earned income in a month.

1982 (Public Law 97-377, enacted December 21). From December 18, 1982, to September 30, 1983, certain

home energy assistance payments are excluded if a state agency certified that they are based on need.

1983 (Public Law 97-424, enacted January 6). Support or maintenance assistance (including home energy assistance) provided in kind by a nonprofit organization or in cash or in kind by certain providers of home energy is excluded if the state determines that the assistance is based on need. Provision is applicable through September 1984.

Certain home energy assistance payments are excluded if a state agency certified that the assistance is based on need. Provision is applicable through June 1985.

1984 (Public Law 98-369, enacted July 18). The 1983 provisions for support and maintenance and home energy assistance continue to October 1, 1987.

1986 (Public Law 99-498, enacted October 17). Educational assistance used for educational expenses under the Higher Education Act of 1965 as amended.

1987 (Public Law 100-203, enacted December 22). The 1983 provisions for support and maintenance and home energy assistance made permanent.

Excludes death payments (for example, proceeds from life insurance) from SSI income determinations to the extent they were spent on last illness and burial.

Modifies the 1982 resource exclusion for burial funds to extend the exclusion to any burial fund of \$1,500 or less maintained separately from all other assets, thereby allowing interest to be excluded from income if retained in the fund.

1988 (Public Law 100-383, enacted August 10). Restitution payments made to Japanese internees and relocated Aleutians.

1989 (Public Law 101-239, enacted December 19). Interest on agreements representing the purchase of an excluded burial space.

Payments from the Agent Orange Settlement.

Value of a ticket for domestic travel received as a gift and not cashed.

1990 (Public Law 101-508, enacted November 5). Earned income tax credit (including the child health insurance portion).

Payments received from a state-administered fund established to aid victims of crime.

Impairment-related work expenses excluded from income in determining initial eligibility for benefits.

Payments received as state or local government relocation assistance.

Payments received under the Radiation Exposure Compensation Act.

Redefines as earned income, royalties earned in connection with any publication of the individual's work and honoraria received for services rendered (previously defined as unearned income).

1993 (Public Law 103-66, enacted August 10). Hostile fire pay to members of the uniformed services.

Payments received as state or local government relocation assistance made permanent.

1994 (Public Law 103-286, enacted August 1). Payments to victims of Nazi persecution.

1998 (Public Law 105-285, enacted October 27). Funds made available to an SSI recipient by a state or local government or a nonprofit organization as part of the Individual Development Account demonstration project.

(Public Law 105-306, enacted October 28). In-kind gifts to children with life-threatening conditions by tax-exempt organizations not converted to cash.

The first \$2,000 annually of cash gifts by tax-exempt organizations to, or for the benefit of, individuals under age 18 with life-threatening conditions.

(Public Law 105-369, enacted November 12). Payments made under the Ricky Ray Hemophilia Relief Fund Act of 1998.

2000 (Public Law 106-554, enacted December 21). Interest on funds deposited in an individual development account.

Any adjustments made to prior payments from other federal programs to account for the error in the computation of the Consumer Price Index during 1999.

2001 (Public Law 107-16, enacted June 7). The refundable child tax credit is excluded in determining eligibility for means-tested programs, including SSI.

2004 (Public Law 108-203, enacted March 2). Changes the calculation of infrequent and irregular income from a monthly to a quarterly basis.

Excludes from the determination of an individual's income all interest and dividend income earned on countable resources. Effective July 2004.

Permits the student earned income exclusion to apply to any individual under age 22 who is a student. Thus, students under age 22 who are married or heads of households would be eligible for the exclusion. Effective April 2005.

Excludes from the determination of income any gift to an individual for use in paying tuition or educational fees, just as grants, scholarships, and fellowships for

such use are currently excluded from the determination of income. Effective June 2004.

2005 (Public Law 109-64, enacted September 20). Amends the National Flood Insurance Act of 1968 to specify that assistance provided under a program for flood mitigation activities with respect to a property would not be considered income or a resource of the owner of the property when determining eligibility for or benefit levels under any income assistance or resource-tested program (including SSI) that is funded in whole or in part by a federal agency or by appropriated federal funds.

2006 (Public Law 109-432, enacted December 20). Extends the present law that allows combat pay to be considered for Earned Income Tax Credit (EITC) purposes for one additional year (for taxable years ending before January 1, 2008). For SSI purposes, EITC payments are excluded from income, and are not a countable resource for 9 calendar months following the month of receipt.

2008 (Public Law 110-185, enacted February 13). A rebate payment received under the Economic Stimulus Act of 2008, and any other credit or refund under section 6428 of the Internal Revenue Code, would not be taken into account as income for purposes of SSI.

(Public Law 110-245, enacted June 17). Privatized military housing allowances withdrawn directly from a servicemember's pay by military payroll and paid to the landlord will be considered in-kind income, and the SSI benefit reduction attributable to the housing allowance will be capped at one-third of the federal benefit rate. In other cases, housing allowances will be considered earned income.

Excludes any cash or in-kind benefits provided under an AmeriCorps program from income consideration. Effective for benefits payable for months beginning 60 days after enactment.

2009 (Public Law 111-5, enacted February 17). A one-time economic recovery payment of \$250 to SSI recipients will not be taken into account as income for purposes of SSI.

The Making Work Pay tax credit, which provides a tax credit in the form of decreased withholding by employers, will not be counted as income.

Resources

1972 (Public Law 92-603, enacted October 30). Countable resources limited to \$1,500 or less for an individual and to \$2,250 or less for a couple.

1984 (Public Law 98-369, enacted July 18). Limit on countable resources raised by \$100 a year for individuals and \$150 a year for couples, beginning in cal-

endar year 1985 through 1989. The respective limits would become \$2,000 for an individual and \$3,000 for a couple in 1989 and thereafter.

1999 (Public Law 106-169, enacted December 14). Includes generally in the countable resources of an individual the assets of a trust that could be used for the benefit of the individual or spouse.

General Exclusions

1972 (Public Law 92-603, enacted October 30). A home of reasonable value—established *by regulation* as not exceeding a fair-market value of \$25,000 (\$35,000 in Alaska and Hawaii).

Personal effects and household goods of reasonable value established *by regulation* as not exceeding a total market value of \$1,500.

An automobile of reasonable value—established *by regulation* as not exceeding a market value of \$1,200.

An automobile may be excluded, regardless of value, if the individual's household uses it for employment or medical treatment or if it is modified to be operated by or for transportation of a handicapped person.

Life insurance with face value of \$1,500 or less.

1976 (Public Law 94-569, enacted October 20). The recipient's home, regardless of value, is excluded from consideration in determining resources.

1977 (Public Law 95-171, enacted November 12). Assistance received under the Disaster Relief and Emergency Assistance Act of 1974 for 9 months following receipt.

1979 Reasonable value for an automobile increased *by regulation* to \$4,500 of current-market value; personal goods and household effects increased to \$2,000 of equity value.

1982 (Public Law 97-248, enacted September 3). The value, within prescribed limits, of a burial space for the recipient, spouse, and immediate family is excluded. In addition, \$1,500 each (less the value of already excluded life insurance and any amount in an irrevocable burial arrangement) may be set aside for the burial of the recipient and spouse.

1984 (Public Law 98-369, enacted July 18). The unspent portion of any retroactive Title II or Title XVI payment is excluded for 6 months following its receipt, and the individual must be given written notice of the time limit on the exclusion.

1985 *Regulations* permit exclusion, regardless of value, of an automobile needed for essential transportation or modified for a handicapped person. The \$4,500

current market value limit applies only if no automobile could be excluded based on the nature of its use.

1987 (Public Law 100-203, enacted December 22). Provides for suspension of the 1980 transfer of assets provision, in any month that it is determined that undue hardship would result.

Real property that cannot be sold for the following reasons: it is jointly owned; its sale would cause the other owner(s) undue hardship because of loss of housing; its sale is barred by a legal impediment; or the owner's reasonable efforts to sell have been unsuccessful.

Temporarily extends the 1984 exclusion of retroactive Title II and Title XVI benefits from 6 months to 9 months (the longer exclusion applies to benefits paid in fiscal years 1988 and 1989).

1988 (Public Law 100-707, enacted November 23). Removes the time limit for exclusion of disaster assistance.

2004 (Public Law 108-203, enacted March 2). Increases to 9 months and makes uniform the time period for excluding from resources amounts attributable to payments of past-due Social Security and SSI benefits and earned income and child tax credits. Effective for such payments received on or after the date of enactment.

2005 *Regulations* permit exclusion of, regardless of value,

- One automobile if used for transportation for the beneficiary or a member of the beneficiary's household and
- Personal goods and household effects.

Special Exclusions

1972 (Public Law 92-603, enacted October 30). Assets of a blind or disabled individual that are necessary to an approved plan of self-support.

Tools and other property essential to self-support, within reasonable limits. Shares of nonnegotiable stock in regional or village corporations held by natives of Alaska.

For persons transferred from state programs to SSI, resource exclusions equal to the maximum amount permitted as of October 1972 under the state program.

1988 (Public Law 100-383, enacted August 10). Restitution payments made to Japanese internees and relocated Aleutians.

1989 (Public Law 101-239, enacted December 19). Specifies that no limitation can be placed on property

essential to self-support used in a trade or business, or by an individual as an employee (including the tools of a tradesperson and the machinery and livestock of a farmer).

Payments from the Agent Orange Settlement.

1990 (Public Law 101-508, enacted November 5). Earned income tax credit excluded for the month following the month the credit is received.

Payments received from a state-administered fund established to aid victims of crime excluded for a 9-month period. Individuals not required to file for such benefits.

Payments received as state or local government relocation assistance excluded for a 9-month period. (The provision expired 3 years after its effective date.)

Payments received under the Radiation Exposure Compensation Act.

1993 (Public Law 103-66, enacted August 10). Makes permanent the 9-month exclusion of payments received as state or local government relocation assistance.

1994 (Public Law 103-286, enacted August 1). Payments to victims of Nazi persecution.

1996 (Public Law 104-193, enacted August 22). Dedicated financial institution accounts required to be established for large past-due benefits for disabled individuals under age 18 with a representative payee.

1998 (Public Law 105-285, enacted October 27). Funds made available to an SSI recipient by a state or local government or a nonprofit organization as part of the Individual Development Account demonstration project.

(Public Law 105-306, enacted October 28). In-kind gifts to children with life-threatening conditions by tax-exempt organizations not converted to cash.

The first \$2,000 annually of cash gifts by tax-exempt organizations to, or for the benefit of, individuals under age 18 with life-threatening conditions.

(Public Law 105-369, enacted November 12). Payments made under the Ricky Ray Hemophilia Relief Fund Act of 1998.

2000 (Public Law 106-554, enacted December 21). Funds deposited by an individual in an individual development account and the interest on those funds.

2001 (Public Law 107-16, enacted June 7). The refundable child tax credit in the month of receipt and in the following month.

2004 (Public Law 108-203, enacted March 2). Grants, scholarships, fellowships, or gifts to be used for tuition

or educational fees for 9 months after the month of receipt.

2008 (Public Law 110-185, enacted February 13). A rebate payment received under the Economic Stimulus Act of 2008, and any other credit or refund under section 6428 of the Internal Revenue Code, would not be included as a resource during the month of receipt or the 2 following months.

(Public Law 110-245, enacted June 17). State-provided pensions for aged, blind, or disabled veterans (or their spouses). Effective for benefits payable for months beginning 60 days after enactment.

2009 (Public Law 111-5, enacted February 17). A one-time economic recovery payment of \$250 to SSI recipients will not be taken into account as a resource for the month of receipt and the following 9 months.

The Making Work Pay tax credit, which provides a tax credit in the form of decreased withholding by employers, will not be taken into account as a resource for the month of receipt and the following 2 months.

Transfer-of-Assets Penalties

1980 (Public Law 96-611, enacted December 28). Assets transferred for less than fair market value for the purpose of establishing eligibility for benefits under the Social Security Act are counted as resources for 24 months after transfer.

1988 (Public Law 100-360, enacted July 1). Removes the transfer-of-assets penalty for transfers made July 1, 1988, or later.

1999 (Public Law 106-169, enacted December 14). Provides a penalty under the SSI program for the disposal of resources at less than fair market value. The penalty is a loss of benefits for up to 36 months. A formula is provided to determine the number of months.

Presumptive and Emergency Payments and Interim Assistance Reimbursement

Presumptive Payments

1972 (Public Law 92-603, enacted October 30). A person applying on the basis of disability who meets all other criteria of eligibility, and is likely to be disabled, may receive payments for 3 months pending the disability determination.

1976 (Public Law 94-569, enacted October 20). Presumptive payment provision was extended to persons applying on the basis of blindness.

1990 (Public Law 101-508, enacted November 5). Extends the period for receipt of payments to 6 months.

Emergency Advance Payments

1972 (Public Law 92-603, enacted October 30). Any applicant who can be presumed to meet the eligibility criteria, but has not yet been determined eligible, and who is faced with a financial emergency may receive an immediate cash advance of up to \$100.

1987 (Public Law 100-203, enacted December 22). Increases the maximum emergency advance payment amount to the maximum amount of the regular federal SSI monthly benefit rate plus, if any, the federally administered state supplementary payment.

1996 (Public Law 104-193, enacted August 22). Applicants who have a financial emergency may receive an emergency advance payment in the month of application, which, effective with this law, is always before the first month of eligibility. These advance payments are recouped by proportional reductions in the recipient's first 6 months of SSI benefits.

Interim Assistance Reimbursement

1974 (Public Law 93-368, enacted August 7). SSA may enter into agreements with the states to repay them directly for assistance payments made to an SSI applicant while his/her claim is being adjudicated. The repayment is made from the first check due to the individual. This legislation expires June 30, 1976.

1976 (Public Law 94-365, enacted July 14). The authority to repay the state for interim assistance is made permanent.

1987 (Public Law 100-203, enacted December 22). Extends interim assistance reimbursement to situations in which payments are made by states or political subdivisions to persons whose SSI payments were suspended or terminated and who subsequently are found to be eligible for such benefits. Also clarifies that the payment from which the interim assistance reimbursement is paid must be the first payment of benefits relating to the interim period.

Medicaid Eligibility

1972 (Public Law 92-603, enacted October 30). States can provide Medicaid coverage to all recipients of SSI payments. Alternatively, they can limit coverage by applying more restrictive criteria from the state Medicaid plan in effect on January 1, 1972.

States can accept SSA determination of eligibility or make their own determination.

1976 (Public Law 94-566, enacted October 20). Preserves the Medicaid eligibility of recipients who become ineligible for cash SSI payments due to the cost-of-living increases in Social Security benefits.

1980 (Public Law 96-265, enacted June 9). Blind or disabled recipients under age 65 no longer eligible for either regular or special SSI payments because of their earnings may retain SSI recipient status for Medicaid eligibility purposes under the following conditions: (1) they continue to have the disabling impairment, (2) they meet all nondisability eligibility criteria except for earned income, (3) they would be seriously inhibited from continuing employment without Medicaid services, and (4) their earnings are insufficient to provide a reasonable equivalent of SSI payments and Medicaid.

In states that do not provide Medicaid coverage categorically to all SSI recipients, qualification for Medicaid benefits depends on the state's specific eligibility and program requirements.

The Medicaid provision of the 1980 legislation was in effect from January 1, 1981, through December 31, 1983. Under a 1-year demonstration project, beginning January 1, 1984, this provision was continued for persons already eligible for regular or special SSI payments or for retention of Medicaid eligibility.

1984 (Public Law 98-460, enacted October 9). Medicaid provision of 1980 legislation extended through June 30, 1987 (retroactive to January 1, 1984).

1986 (Public Law 99-272, enacted April 7). Restores Medicaid eligibility for some disabled widow(er)s who became ineligible for SSI when their Title II benefits increased in 1984 because of a change in the Social Security disabled widow(er)s benefits reduction factor.

1986 (Public Law 99-643, enacted November 10). The SSI recipient status for Medicaid eligibility provision of the 1980 amendments is made permanent.

Effective July 1, 1987, certain expenses are excluded from earnings when determining sufficiency of earnings to establish SSI recipient status eligibility for Medicaid purposes:

- Impairment-related work expenses of disabled persons,
- Work expenses of blind persons,
- Income required for achieving an approved self-support plan, and
- The value of publicly funded attendant care services.

Effective July 1, 1987, preserves the Medicaid eligibility of recipients who become ineligible for SSI pay-

ments because of entitlement to, or an increase in, Social Security disabled adult child benefits on or after the effective date.

Effective July 1, 1987, requires all states to provide Medicaid coverage for recipients in special SSI status (either receiving special SSI payments or in the special recipient status described for 1980) if they received Medicaid coverage the month before special SSI status.

1987 (Public Law 100-203, enacted December 22).

Effective July 1, 1988, restores or preserves the Medicaid eligibility of persons aged 60 or older who are eligible for Social Security benefits as widows or widowers (but not eligible for Medicare) and who become ineligible for SSI payments or state supplementation because of the receipt of old-age or survivors insurance benefits under Social Security.

1990 (Public Law 101-508, enacted November 5). Age limit for retention of SSI recipient status for Medicaid eligibility purposes (1980 and subsequent work incentive provisions, above) is eliminated.

Preserves the Medicaid eligibility of SSI recipients who become ineligible for payments when they become entitled to Social Security disabled widow(er)s benefits following the revised definition used for their disability.

1997 (Public Law 105-33, enacted August 5). Requires states to continue Medicaid coverage for disabled children who were receiving SSI payments as of August 22, 1996, and would have continued to be eligible for such payments except that their eligibility terminated because they did not meet the revised SSI childhood disability standard established under Public Law 104-193.

2006 (Public Law 109-171, enacted February 8). Begins Medicaid coverage for children who are eligible for SSI effective the month the SSI application is filed or the first month of SSI eligibility, whichever is later. (Under prior law, Medicaid eligibility for such children began the month following the month of the SSI application or first eligibility.)

State Supplementation

1972 (Public Law 92-603, enacted October 30). States are given the option of providing supplementary payments both to recipients transferred from the state program and to those newly eligible for SSI.

States may either administer the payments themselves or have the Social Security Administration make payments on their behalf. When state supplementary payments are federally administered, the Social Security Administration makes eligibility and

payment determinations for the state and assumes administrative costs.

“Hold harmless” protection, which limits a state’s fiscal liability to its share of expenditures for Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled for calendar year 1972, is provided to states electing federal administration of their supplementary plans. This provision applies only to supplementary payments that do not, on the average, exceed a state’s “adjusted payment level.” (The adjusted payment level is the average of the payments that individuals with no other income received in January 1972; it may include the bonus value of food stamps. Adjustments are provided for payments that had been below state standards.)

1973 (Public Law 93-66, enacted July 9). Provides for mandatory state supplementation as assurance against reduction of income for persons who received state assistance in December 1973 and were transferred to SSI. These supplementary payments must equal the difference between (1) the amount of the state assistance payment that the individual received in December 1973 plus other income and (2) the individual’s federal SSI payment plus other income.

1976 (Public Law 94-585, enacted October 21). After June 30, 1977, when the federal SSI payment level is increased by a cost-of-living increase, such an increase will be excluded in calculating the “hold harmless” amount.

Requires states to maintain state supplementation payments at the level of December 1976 (“maintenance of payments”) or to continue to pay in supplements the same total annual amounts (“maintenance of expenditures”) when the federal SSI payment level is increased and thereby pass through any increases in federal benefits without reducing state supplements.

1982 (Public Law 97-248, enacted September 3). Begins a 3-year phase out of “hold harmless” protection. Effective with fiscal year 1985, Wisconsin and Hawaii (the only remaining “hold harmless” states) assumed the full cost of their supplementary payments.

1983 (Public Law 98-21, enacted April 20). Federal pass-through law is adjusted (1) by substituting the state supplementary payment levels in effect in March 1983 for those in effect in December 1976 as the levels that states must maintain in complying with the pass-through requirements, and (2) with regard to the \$20 (individual) and \$30 (couple) increase in the federal SSI standard in July 1983, by requiring states to pass through only as much as would have been required if the SSI cost-of-living adjustment had been made in July 1983.

1987 (Public Law 100-203, enacted December 22). Provides for federal administration of state supplements to residents of medical institutions.

Provides for required pass through of \$5 increase in federal rate for persons whose care in institutions is paid in substantial part by Medicaid.

1993 (Public Law 103-66, enacted August 10). Requires states to pay fees for federal administration of their state supplementation payments. The fees are \$1.67 for each monthly supplementary payment in fiscal year 1994, \$3.33 in fiscal year 1995, and \$5.00 in fiscal year 1996. Fees for subsequent fiscal years will be \$5.00 or another amount determined by the commissioner to be appropriate. The commissioner may charge the states additional fees for services they request that are beyond the level customarily provided in administering state supplementary payments.

1997 (Public Law 105-33, enacted August 5). Revises the schedule of per-payment fees for federal administration of state supplementation for fiscal years 1998 (\$6.20) through 2002 (\$8.50) and provides a formula for determining the fee beyond fiscal year 2002.

1999 (Public Law 106-170, enacted December 17). A state that has an agreement with SSA to administer its supplementation payments must remit both payments and fees prior to the SSI payment date.

2000 (Public Law 106-554, enacted December 21). Changes the effective date of above provision from 2009 to 2001.

Overpayment Recovery

1984 (Public Law 98-369, enacted July 18). Limits the rate of recovering overpayments from monthly payments to the lesser of (1) the monthly payment or (2) 10 percent of a recipient's monthly income. Permits a higher or lower adjustment at the request of the recipient subject to the agreement of the Commissioner. The limit does not apply if fraud, willful misrepresentation, or concealment of material information was involved on the part of the recipient or spouse in connection with the overpayment.

Waives recovery of certain overpayments due to amount of excess resources of \$50 or less.

Provides temporary authority for the recovery of overpayments from tax refunds.

1988 (Public Law 100-485, enacted October 13). Grants permanent authority to recover overpayments from tax refunds.

1998 (Public Law 105-306, enacted October 28). Authorizes SSA to collect SSI overpayments by offsetting Social Security benefits, with a maximum monthly

offset of no more than 10 percent of the Social Security benefit.

1999 (Public Law 106-169, enacted December 14). Makes representative payees liable for an SSI overpayment caused by a payment made to a recipient who has died, and requires SSA to establish an overpayment control record under the representative payee's Social Security number.

Requires SSA to recover SSI overpayments from SSI lump-sum amounts by withholding at least 50 percent of the lump-sum payment or the amount of the overpayment, whichever is less.

Extends all of the debt collection authorities currently available for the collection of overpayments under the OASDI program to the SSI program.

2001 (Public Law 107-16, enacted June 7). Subjects one-time tax refund payments provided under this Act to overpayment recovery under tax refund offset provisions.

2004 (Public Law 108-203, enacted March 2). Provides for recovery of overpayment of SSI benefits by withholding from OASDI and Special Veterans' Benefits up to 100 percent of any underpayment of benefits and 10 percent of ongoing monthly benefits.

Also provides for recovery of overpayment of OASDI or Special Veterans' Benefits by withholding from SSI up to 100 percent of any underpayment of benefits but limits any recovery from SSI benefits to the lesser of 100 percent of the monthly benefit or 10 percent of the individual's total monthly income.

Effective with respect to overpayments that are outstanding at the time of enactment.

Attorney Fees

2004 (Public Law 108-203, enacted March 2). Extends the current OASDI attorney fee withholding process to SSI for a period of 5 years.

2010 (Public Law 111-142, enacted February 27). Permanently extends the OASDI attorney fee withholding process to SSI. The prior authority expired March 1, 2010. Allows direct payment of attorneys and certain nonattorney representatives.

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Medicare

The following are brief summaries of complex subjects as of November 1, 2010. They should be used only as overviews and general guides to the Medicare and Medicaid programs. The views expressed herein do not necessarily reflect the policies or legal positions of the Centers for Medicare & Medicaid Services (CMS) or the Department of Health and Human Services (HHS). These summaries do not render any legal, accounting, or other professional advice, nor are they intended to explain fully all of the provisions or exclusions of the relevant laws, regulations, and rulings of the Medicare and Medicaid programs. Original sources of authority should be researched and utilized.¹

Overview

Title XVIII of the Social Security Act, designated “Health Insurance for the Aged and Disabled,” is commonly known as Medicare. As part of the Social Security Amendments of 1965, the Medicare legislation established a health insurance program for aged persons to complement the retirement, survivors, and disability insurance benefits under Title II of the Social Security Act.

When first implemented in 1966, Medicare covered most persons aged 65 or older. In 1973, the following groups also became eligible for Medicare benefits: persons entitled to Social Security or Railroad Retirement disability cash benefits for at least 24 months, most persons with end-stage renal disease (ESRD), and certain otherwise noncovered aged persons who elect to pay a premium for Medicare coverage. Beginning in July 2001, persons with Amyotrophic Lateral Sclerosis (Lou Gehrig’s Disease) are allowed to waive the 24-month waiting period. Beginning March 30, 2010, individuals in the vicinity of Libby, Montana who are diagnosed with an asbestos-related condition are Medicare-eligible. Medicare eligibility could also apply to individuals in other areas who are diagnosed with a medical condition caused by exposure to a public health hazard for which a future public health emergency declaration is made under the Comprehensive Environmental Response, Compensation, and Liability Act of 1980 (Public Law 96-510). This very broad description of Medicare eligibility is expanded in the next section.

Medicare originally consisted of two parts: Hospital Insurance (HI), also known as Part A, and Supplemen-

tary Medical Insurance (SMI), which in the past was also known simply as Part B. Part A helps pay for inpatient hospital, home health agency, skilled nursing facility, and hospice care. Part A is provided free of premiums to most eligible people; certain otherwise ineligible people may voluntarily pay a monthly premium for coverage. Part B helps pay for physician, outpatient hospital, home health agency, and other services. To be covered by Part B, all eligible people must pay a monthly premium.

A third part of Medicare, sometimes known as Part C, is the Medicare Advantage program, which was established as the Medicare+Choice program by the Balanced Budget Act of 1997 (Public Law 105-33) and subsequently renamed and modified by the Medicare Prescription Drug, Improvement, and Modernization Act (MMA) of 2003 (Public Law 108-173). The Medicare Advantage program expands beneficiaries’ options for participation in private-sector health care plans.

The MMA also established a fourth part of Medicare, known as Part D, to help pay for prescription drugs not otherwise covered by Part A or Part B. Part D initially provided access to prescription drug discount cards, on a voluntary basis and at limited cost to all enrollees (except those entitled to Medicaid drug coverage) and, for low-income beneficiaries, transitional limited financial assistance for purchasing prescription drugs and a subsidized enrollment fee for the discount cards. This temporary plan began in mid-2004 and phased out during 2006. In 2006 and later, Part D provides subsidized access to prescription drug insurance coverage on a voluntary basis for all beneficiaries upon payment of a premium, with premium and cost-sharing subsidies for low-income enrollees.

Part D activities are handled within the SMI trust fund but in an account separate from Part B. It should thus be noted that the traditional treatment of “SMI” and “Part B” as synonymous is no longer accurate, since SMI now consists of Parts B and D. The purpose of the two separate accounts within the SMI trust fund is to ensure that funds from one part are not used to finance the other.

When Medicare began on July 1, 1966, approximately 19 million people enrolled. In 2010, over 47 million are enrolled in one or both of Parts A and B of the Medicare program, and over 11 million of them have chosen to participate in a Medicare Advantage plan.

Entitlement and Coverage

Part A is generally provided automatically and free of premiums to persons aged 65 or older who are eligible for Social Security or Railroad Retirement benefits,

1. These summaries were prepared by Barbara S. Klees, Christian J. Wolfe, and Catherine A. Curtis, Office of the Actuary, Centers for Medicare & Medicaid Services, 7500 Security Blvd., Baltimore, MD 21244. The authors wish to express their gratitude to Mary Onnis Waid, who originated these summaries and diligently prepared them for many years before her retirement.

whether they have claimed these monthly cash benefits or not. Also, workers and their spouses with a sufficient period of Medicare-only coverage in federal, state, or local government employment are eligible beginning at age 65. Similarly, individuals who have been entitled to Social Security or Railroad Retirement disability benefits for at least 24 months, and government employees with Medicare-only coverage who have been disabled for more than 29 months, are entitled to Part A benefits. (As noted previously, the waiting period is waived for persons with Lou Gehrig's Disease, and certain persons in the Libby, Montana vicinity who are diagnosed with asbestos-related conditions are Medicare-eligible. It should also be noted that, over the years, there have been certain liberalizations made to both the waiting period requirement and the limit on earnings allowed for entitlement to Medicare coverage based on disability.) Part A coverage is also provided to insured workers with ESRD (and to insured workers' spouses and children with ESRD), as well as to some otherwise ineligible aged and disabled beneficiaries who voluntarily pay a monthly premium for their coverage. In 2009, Part A provided protection against the costs of hospital and specific other medical care to about 46 million people (over 38 million aged and almost 8 million disabled enrollees). Part A benefit payments totaled \$239.3 billion in 2009.

The following health care services are covered under Part A:

- Inpatient hospital care. Coverage includes costs of a semiprivate room, meals, regular nursing services, operating and recovery rooms, intensive care, inpatient prescription drugs, laboratory tests, X-rays, psychiatric hospitals, inpatient rehabilitation, and long-term care hospitalization when medically necessary, as well as all other medically necessary services and supplies provided in the hospital. An initial deductible payment is required of beneficiaries who are admitted to a hospital, plus copayments for all hospital days following day 60 within a benefit period (described later).
- Skilled nursing facility (SNF) care. Coverage is provided by Part A only if it follows within 30 days (generally) a hospitalization of 3 days or more and is certified as medically necessary. Covered services are similar to those for inpatient hospital care, and include rehabilitation services and appliances. The number of SNF days provided under Medicare is limited to 100 days per benefit period (described later), with a copayment required for days 21 through 100. Part A does not cover nursing facility care if the patient does not require skilled nursing or skilled rehabilitation services.
- Home health agency (HHA) care (covered by Parts A and B). The Balanced Budget Act transferred from

Part A to Part B those home health services furnished on or after January 1, 1998, that are unassociated with a hospital or SNF stay. Part A will continue to cover the first 100 visits following a 3-day hospital stay or a SNF stay; Part B covers any visits thereafter. Home health care under Parts A and B has no copayment and no deductible.

HHA care, including care provided by a home health aide, may be furnished part time by an HHA in the residence of a homebound beneficiary, if intermittent or part-time skilled nursing and/or certain other therapy or rehabilitation care is necessary. Certain medical supplies and durable medical equipment may also be provided, although beneficiaries must pay a 20 percent coinsurance for durable medical equipment, as required under Part B of Medicare. There must be a plan of treatment and periodic review by a physician. Full-time nursing care, food, blood, and drugs are not provided as HHA services.

- Hospice care. Coverage is provided for services to terminally ill persons with life expectancies of 6 months or less who elect to forgo the standard Medicare benefits for treatment of their illness and to receive only hospice care for it. Such care includes pain relief, supportive medical and social services, physical therapy, nursing services, and symptom management. However, if a hospice patient requires treatment for a condition that is not related to the terminal illness, Medicare will pay for all covered services necessary for that condition. The Medicare beneficiary pays no deductible for the hospice program but does pay small coinsurance amounts for drugs and inpatient respite care.

An important Part A component is the benefit period, which starts when the beneficiary first enters a hospital and ends when there has been a break of at least 60 consecutive days since inpatient hospital or skilled nursing care was provided. There is no limit to the number of benefit periods covered by Part A during a beneficiary's lifetime; however, inpatient hospital care is normally limited to 90 days during a benefit period, and copayment requirements (detailed later) apply for days 61 through 90. If a beneficiary exhausts the 90 days of inpatient hospital care available in a benefit period, the beneficiary can elect to use days of Medicare coverage from a nonrenewable "lifetime reserve" of up to 60 (total) additional days of inpatient hospital care. Copayments are also required for such additional days.

All citizens (and certain legal aliens) aged 65 or older, and all disabled persons entitled to coverage under Part A, are eligible to enroll in Part B on a voluntary basis by payment of a monthly premium. Almost all persons entitled to Part A choose to enroll in Part B. In 2009, Part B provided protection against the costs of physician

and other medical services to about 43 million people (36 million aged and 7 million disabled enrollees). Part B benefits totaled \$202.6 billion in 2009.

Part B covers certain medical services and supplies, including the following:

- Physicians' and surgeons' services, including some covered services furnished by chiropractors, podiatrists, dentists, and optometrists;
- Services provided by Medicare-approved practitioners who are not physicians, including certified registered nurse anesthetists, clinical psychologists, clinical social workers (other than in a hospital or SNF), physician assistants, and nurse practitioners and clinical nurse specialists in collaboration with a physician;
- Services in an emergency room, outpatient clinic, or ambulatory surgical center, including same-day surgery;
- Home health care not covered under Part A;
- Laboratory tests, X-rays, and other diagnostic radiology services;
- Certain preventive care services and screening tests;
- Most physical and occupational therapy and speech pathology services;
- Comprehensive outpatient rehabilitation facility services, and mental health care in a partial hospitalization psychiatric program, if a physician certifies that inpatient treatment would be required without it;
- Radiation therapy; renal (kidney) dialysis and transplants; heart, lung, heart-lung, liver, pancreas, and bone marrow transplants; and, as of April 2001, intestinal transplants;
- Approved durable medical equipment for home use, such as oxygen equipment and wheelchairs, prosthetic devices, and surgical dressings, splints, casts, and braces;
- Drugs and biologicals that are not usually self-administered, such as hepatitis B vaccines and immunosuppressive drugs (certain self-administered anticancer drugs are covered);
- Certain services specific to people with diabetes;
- Ambulance services, when other methods of transportation are contraindicated; and
- Rural health clinic and federally qualified health center services, including some telemedicine services.

To be covered, all services must be either medically necessary or one of several prescribed preventive benefits. Part B services are generally subject to a deductible

and coinsurance (see next section). Certain medical services and related care are subject to special payment rules, including deductibles (for blood), maximum approved amounts (for Medicare-approved physical, speech, or occupational therapy services performed in settings other than hospitals), and higher cost-sharing requirements (such as those for certain outpatient hospital services). The preceding description of Part B-covered services should be used only as a general guide, due to the wide range of services covered under Part B and the quite specific rules and regulations that apply.

Medicare Parts A and B, as described above, constitute the original fee-for-service Medicare program. Medicare Part C, also known as Medicare Advantage, is an alternative to traditional Medicare. Although all Medicare beneficiaries can receive their benefits through the traditional fee-for-service program, most beneficiaries enrolled in both Part A and Part B can choose to participate in a Medicare Advantage plan instead. Medicare Advantage plans are offered by private companies and organizations and are required to provide at least those services covered by Parts A and B, except hospice services. These plans may (and in certain situations must) provide extra benefits (such as vision or hearing) or reduce cost sharing or premiums. The primary Medicare Advantage plans are:

- Local coordinated care plans (LCCPs), including health maintenance organizations (HMOs), provider-sponsored organizations, local preferred provider organizations (PPOs), and other certified coordinated care plans and entities that meet the standards set forth in the law. Generally, each plan has a network of participating providers. Enrollees may be required to use these providers or, alternatively, may be allowed to go outside the network but pay higher cost-sharing fees for doing so.
- Regional PPO plans, which began in 2006 and offer coverage to one of 26 defined regions. Like local PPOs, regional PPOs have networks of participating providers, and enrollees must use these providers or pay higher cost-sharing fees. However, regional PPOs are required to provide beneficiary financial protection in the form of limits on out-of-pocket cost sharing, and there are specific provisions to encourage regional PPO plans to participate in Medicare.
- Private fee-for-service (PFFS) plans, which were not required to have networks of participating providers through 2010. Beginning in 2011, this will still be the case for PFFS plans in "network areas" (usually counties) with fewer than two network-based LCCPs and/or regional PPOs, and members will be able to use any Medicare provider willing to accept the plan's payment. However, for PFFS plans in network areas with two or more network-based LCCPs and/or regional PPOs, provider networks will be mandatory,

and members may be required to use these participating providers.

- Special Needs Plans, which are restricted to beneficiaries who are dually eligible for Medicare and Medicaid, live in long-term care institutions, or have certain severe and disabling conditions.

For individuals entitled to Part A or enrolled in Part B (except those entitled to Medicaid drug coverage), the new Part D initially provided access to prescription drug discount cards, at a cost of no more than \$30 annually, on a voluntary basis. For low-income beneficiaries, Part D initially provided transitional financial assistance of up to \$600 per year for purchasing prescription drugs, plus a subsidized enrollment fee for the discount cards. This temporary plan began in mid-2004 and phased out in 2006.

Beginning in 2006, Part D provides subsidized access to prescription drug insurance coverage on a voluntary basis, upon payment of a premium, to individuals entitled to Part A or enrolled in Part B, with premium and cost-sharing subsidies for low-income enrollees. Beneficiaries may enroll in either a stand-alone prescription drug plan (PDP) or an integrated Medicare Advantage plan that offers Part D coverage. Enrollment began in late 2005. In 2009, Part D provided protection against the costs of prescription drugs to about 33 million people. Part D benefits totaled \$60.5 billion in 2009.

Part D coverage includes most FDA-approved prescription drugs and biologicals. (The specific drugs currently covered in Parts A and B remain covered there.) However, plans may set up formularies for their prescription drug coverage, subject to certain statutory standards. Part D coverage can consist of either standard coverage (defined later) or an alternative design that provides the same actuarial value. For an additional premium, plans may also offer supplemental coverage exceeding the value of basic coverage.

It should be noted that some health care services are not covered by any portion of Medicare. Noncovered services include long-term nursing care, custodial care, and certain other health care needs, such as dentures and dental care, eyeglasses, and hearing aids. These services are not a part of the Medicare program, unless they are a part of a private health plan under the Medicare Advantage program.

Program Financing, Beneficiary Liabilities, and Payments to Providers

All financial operations for Medicare are handled through two trust funds, one for Hospital Insurance (HI, Part A) and one for Supplementary Medical Insurance (SMI,

Parts B and D). These trust funds, which are special accounts in the U.S. Treasury, are credited with all receipts and charged with all expenditures for benefits and administrative costs. The trust funds cannot be used for any other purpose. Assets not needed for the payment of costs are invested in special Treasury securities. The following sections describe Medicare's financing provisions, beneficiary cost-sharing requirements, and the basis for determining Medicare reimbursements to health care providers.

Program Financing

The HI trust fund is financed primarily through a mandatory payroll tax. Almost all employees and self-employed workers in the United States work in employment covered by Part A and pay taxes to support the cost of benefits for aged and disabled beneficiaries. The Part A tax rate is 1.45 percent of earnings, to be paid by each employee and a matching amount by the employer for each employee, and 2.90 percent for self-employed persons. Beginning in 1994, this tax is paid on all covered wages and self-employment income without limit. (Prior to 1994, the tax applied only up to a specified maximum amount of earnings.) Beginning in 2013, an additional Part A payroll tax of 0.9 percent will be collected on earned income in excess of \$200,000 (for those filing income tax singly) and \$250,000 (for those filing jointly; the earnings thresholds are not indexed). The Part A tax rate is specified in the Social Security Act and cannot be changed without legislation.

Part A also receives income from the following sources: (1) a portion of the income taxes levied on Social Security benefits paid to high-income beneficiaries, (2) premiums from certain persons who are not otherwise eligible and choose to enroll voluntarily, (3) reimbursements from the general fund of the U.S. Treasury for the cost of providing Part A coverage to certain aged persons who retired when Part A began and thus were unable to earn sufficient quarters of coverage (and those federal retirees similarly unable to earn sufficient quarters of Medicare-qualified federal employment), (4) interest earnings on its invested assets, and (5) other small miscellaneous income sources. The taxes paid each year are used mainly to pay benefits for current beneficiaries.

The SMI trust fund differs fundamentally from the HI trust fund with regard to the nature of its financing. As previously noted, SMI is now composed of two parts, Part B and Part D, each with its own separate account within the SMI trust fund. The nature of the financing for both parts of SMI is similar, in that both parts are primarily financed by contributions from the general fund of the U.S. Treasury and (to a much lesser degree) by beneficiary premiums.

For Part B, the contributions from the general fund of the U.S. Treasury are the largest source of income, since beneficiary premiums are generally set at a level that covers 25 percent of the average expenditures for aged beneficiaries. The standard Part B premium rate will be \$115.40 per beneficiary per month in 2011. There are, however, three provisions that can alter the premium rate for certain enrollees (and the third will reduce the premium for most enrollees in 2011). First, penalties for late enrollment (that is, enrollment after an individual's initial enrollment period) may apply, subject to certain statutory criteria. Second, beginning in 2007, beneficiaries whose income is above certain thresholds are required to pay an income-related monthly adjustment amount, in addition to their standard monthly premium. Finally, a "hold-harmless" provision, which prohibits increases in the standard Part B premium from exceeding the dollar amount of an individual's Social Security cost-of-living adjustment, lowers the premium rate for most individuals who have their premiums deducted from their Social Security checks. Under this provision, the Part B premium for 2010 remained at the 2009 amount of \$96.40 for about 73 percent of Part B enrollees because the Social Security cost-of-living adjustment was 0 percent for 2010. Higher premium amounts (\$110.50 or more) were in effect for about 27 percent of Part B enrollees, all of whom were ineligible for protection under the "hold-harmless" provision. (Those not protected included most new enrollees during the year; enrollees with high incomes who were subject to the income-related monthly adjustment amount; and enrollees—such as certain federal, state, and local government retirees—who did not have their Part B premium withheld from a Social Security check. Also not protected were Medicare-Medicaid dual beneficiaries whose premiums were paid by state Medicaid programs.) The increase in the standard Part B premium rate, from \$96.40 to \$110.50, was higher than it otherwise would have been because the cost of adequately funding Part B was spread across a minority of enrollees, rather than across all of them.

For 2011, the Social Security cost-of-living adjustment is again 0 percent. Hence, under the "hold-harmless" provision, most enrollees will continue to pay the same \$96.40 or \$110.50 Part B premium amount in 2011 that they paid in 2010, with the majority of those enrollees paying \$96.40. The standard premium rate of \$115.40 will be in effect only for those enrollees who are not eligible for protection under the "hold-harmless" provision. As in 2010, in order for Part B to be adequately funded in 2011, the 2011 contingency margin had to be increased to account for this situation, and, as a result, a larger-than-usual premium increase will again be borne by a minority of Part B enrollees. It must be noted that the above description of Part B premium amounts for 2011 is accurate as of November 1, 2010. It is possible that Con-

gress will override the increase in the standard Part B premium for 2011.

The 2011 Part B income-related monthly adjustment amounts and total monthly premium amounts to be paid by beneficiaries, according to income level and filing status, are shown in the following table.

2011 Part B income-related monthly adjustment amounts and total monthly premium amounts to be paid by beneficiaries, by filing status and income level

Income	Income-related monthly adjustment (dollars)	Total monthly premium (dollars)
<i>Beneficiaries who file individual tax returns and are single individuals, heads of households, qualifying widow(er)s with dependent children, or married individuals who lived apart from their spouse for the entire taxable year and file separately</i>		
Less than or equal to \$85,000	0	96.40, 110.50, or 115.40 (see text)
Greater than \$85,000 and less than or equal to \$107,000	46.10	161.50
Greater than \$107,000 and less than or equal to \$160,000	115.30	230.70
Greater than \$160,000 and less than or equal to \$214,000	184.50	299.90
Greater than \$214,000	253.70	369.10
<i>Beneficiaries who file joint tax returns</i>		
Less than or equal to \$170,000	0	96.40, 110.50, or 115.40 (see text)
Greater than \$170,000 and less than or equal to \$214,000	46.10	161.50
Greater than \$214,000 and less than or equal to \$320,000	115.30	230.70
Greater than \$320,000 and less than or equal to \$428,000	184.50	299.90
Greater than \$428,000	253.70	369.10
<i>Beneficiaries who are married and lived with their spouse at any time during the year but file separate tax returns</i>		
Less than or equal to \$85,000	0	96.40, 110.50, or 115.40 (see text)
Greater than \$85,000 and less than or equal to \$129,000	184.50	299.90
Greater than \$129,000	253.70	369.10

For Part D, as with Part B, general fund contributions account for the largest source of income, since Part D beneficiary premiums are to represent, on average, 25.5 percent of the cost of standard coverage. The Part D base beneficiary premium for 2011 will be \$32.34. The actual Part D premiums paid by individual beneficiaries equal the base beneficiary premium adjusted by a number of factors. In practice, premiums vary significantly from one Part D plan to another and seldom equal

the base beneficiary premium. As of this writing, it is estimated that the average monthly premium for basic Part D coverage, which reflects the specific plan-by-plan premiums and the estimated number of beneficiaries in each plan, will be about \$30 in 2011. Penalties for late enrollment may apply. (Late enrollment penalties do not apply to enrollees who have maintained creditable prescription drug coverage.) Beneficiaries meeting certain low-income and limited-resources requirements pay substantially reduced premiums or no premiums at all (and are not subject to late enrollment penalties).

Beginning in 2011, beneficiaries with income above certain thresholds will be required to pay an income-related monthly adjustment amount, in addition to their monthly premium. The 2011 Part D income-related monthly adjustment amounts to be paid by beneficiaries, according to income level and filing status, are shown in the following table.

2011 Part D income-related monthly adjustment amounts to be paid by beneficiaries, by filing status and income level

Income	Income-related monthly adjustment (dollars)
<i>Beneficiaries who file individual tax returns and are single individuals, heads of households, qualifying widow(ers) with dependent children, or married individuals who lived apart from their spouse for the entire taxable year and file separately</i>	
Less than or equal to \$85,000	0
Greater than \$85,000 and less than or equal to \$107,000	12.00
Greater than \$107,000 and less than or equal to \$160,000	31.10
Greater than \$160,000 and less than or equal to \$214,000	50.10
Greater than \$214,000	69.10
<i>Beneficiaries who file joint tax returns</i>	
Less than or equal to \$170,000	0
Greater than \$170,000 and less than or equal to \$214,000	12.00
Greater than \$214,000 and less than or equal to \$320,000	31.10
Greater than \$320,000 and less than or equal to \$428,000	50.10
Greater than \$428,000	69.10
<i>Beneficiaries who are married and lived with their spouse at any time during the year but file separate tax returns</i>	
Less than or equal to \$85,000	0
Greater than \$85,000 and less than or equal to \$129,000	50.10
Greater than \$129,000	69.10

In addition to contributions from the general fund of the U.S. Treasury and beneficiary premiums, Part D also receives payments from the states. With the availability of prescription drug coverage and low-income subsidies under Part D, Medicaid is no longer the primary payer for prescription drugs for Medicaid beneficiaries who also

have Medicare, and states are required to defray a portion of Part D expenditures for those beneficiaries.

During the Part D transitional period that began in mid-2004 and phased out during 2006, the general fund of the U.S. Treasury financed the transitional assistance benefit for low-income beneficiaries. Funds were transferred to, and paid from, a Transitional Assistance account within the SMI trust fund.

The SMI trust fund also receives income from interest earnings on its invested assets, as well as a small amount of miscellaneous income. It is important to note that beneficiary premiums and general fund payments for Parts B and D are redetermined annually and separately.

Payments to Medicare Advantage plans are financed from both the HI trust fund and the Part B account within the SMI trust fund in proportion to the relative weights of Part A and Part B benefits to the total benefits paid by the Medicare program.

Beneficiary Payment Liabilities

Fee-for-service beneficiaries are responsible for charges not covered by the Medicare program and for various cost-sharing aspects of Parts A and B. These liabilities may be paid (1) by the Medicare beneficiary; (2) by a third party, such as an employer-sponsored retiree health plan or private Medigap insurance; or (3) by Medicaid, if the person is eligible. The term “Medigap” is used to mean private health insurance that pays, within limits, most of the health care service charges not covered by Parts A or B of Medicare. These policies, which must meet federally imposed standards, are offered by Blue Cross and Blue Shield and various commercial health insurance companies.

In Medicare Advantage plans, the beneficiary’s payment share is based on the cost-sharing structure of the specific plan selected by the beneficiary, since each plan has its own requirements. Most plans have lower deductibles and coinsurance than are required of fee-for-service beneficiaries. Such beneficiaries, in general, pay the monthly Part B premium. However, some Medicare Advantage plans may pay part or all of the Part B premium for their enrollees as an added benefit. Depending on the plan, enrollees may also pay an additional premium for certain extra benefits provided (or, in a small number of cases, for certain Medicare-covered services).

For hospital care covered under Part A, a beneficiary’s fee-for-service payment share includes a one-time deductible amount at the beginning of each benefit period (\$1,132 in 2011). This deductible covers the beneficiary’s part of the first 60 days of each spell of inpatient hospital care. If continued inpatient care is needed

beyond the 60 days, additional coinsurance payments (\$283 per day in 2011) are required through the 90th day of a benefit period. Each Part A beneficiary also has a “lifetime reserve” of 60 additional hospital days that may be used when the covered days within a benefit period have been exhausted. Lifetime reserve days may be used only once, and coinsurance payments (\$566 per day in 2011) are required.

For skilled nursing care covered under Part A, Medicare fully covers the first 20 days of SNF care in a benefit period. But for days 21 through 100, a copayment (\$141.50 per day in 2011) is required from the beneficiary. After 100 days per benefit period, Medicare pays nothing for SNF care. Home health care requires no deductible or coinsurance payment by the beneficiary. In any Part A service, the beneficiary is responsible for fees to cover the first 3 pints or units of nonreplaced blood per calendar year. The beneficiary has the option of paying the fee or of having the blood replaced.

There are no premiums for most people covered by Part A. Eligibility is generally earned through the work experience of the beneficiary or of the beneficiary's spouse. However, most aged people who are otherwise ineligible for premium-free Part A coverage can enroll voluntarily by paying a monthly premium, if they also enroll in Part B. For people with fewer than 30 quarters of coverage as defined by the Social Security Administration (SSA), the Part A monthly premium rate will be \$450 in 2011; for those with 30 to 39 quarters of coverage, the rate will be reduced to \$248. Penalties for late enrollment may apply. Voluntary coverage upon payment of the Part A premium, with or without enrolling in Part B, is also available to disabled individuals for whom coverage has ceased because earnings are in excess of those allowed.

The Part B beneficiary's payment share includes the following: one annual deductible (\$162 in 2011), the monthly premiums, the coinsurance payments for Part B services (usually 20 percent of the remaining allowed charges with certain exceptions noted below), a deductible for blood, certain charges above the Medicare-allowed charge (for claims not on assignment), and payment for any services not covered by Medicare. For outpatient mental health services, the beneficiary is currently liable for 50 percent of the approved charges, but this percentage is to phase down to 20 percent over the 5-year period 2010–2014. For services reimbursed under the outpatient hospital prospective payment system, coinsurance percentages vary by service and currently fall in the range of 20 percent to 50 percent. There are no deductibles or coinsurance for certain services, such as clinical lab tests, HHA services, and some preventive care services (including an initial, “Welcome to Medicare” preventive physical examination and, beginning in 2011,

an annual wellness visit to develop or update a prevention plan).

For the standard Part D benefit design, there is an initial deductible (\$310 in 2011). After meeting the deductible, the beneficiary pays 25 percent of the remaining costs, up to an initial coverage limit (\$2,840 in 2011). The coverage gap starts after an individual's drug costs reach the initial coverage limit and stops when the beneficiary incurs a certain threshold of out-of-pocket costs (\$4,550 in 2011). Previously, beneficiaries had to pay the full cost of their prescription drugs while in this coverage gap. However, under the Patient Protection and Affordable Care Act (Public Law 111-148) as amended by the Health Care and Education Reconciliation Act of 2010 (Public Law 111-152)—collectively referred to as the Affordable Care Act—beneficiaries (excluding those low-income enrollees eligible for cost-sharing subsidies) who entered the coverage gap in 2010 received a \$250 rebate, and, starting in 2011, these beneficiaries will receive a 50-percent discount on covered brand-name prescription drugs. Additionally, reductions in beneficiary cost sharing in the coverage gap will phase in for generic drug costs beginning in 2011 and for brand-name prescription drug costs beginning in 2013; by 2020, the coverage gap will be fully phased out, with beneficiaries responsible for 25 percent of their prescription drug costs. (The 2011 out-of-pocket threshold of \$4,550 is equivalent to total covered drug costs ranging from \$6,447.50 to \$6,719.03, depending on the percentage of brand-name versus generic drugs used by the beneficiary while in the coverage gap.)

For costs incurred after reaching the out-of-pocket threshold, catastrophic coverage is provided, which requires enrollees to pay the greater of 5 percent coinsurance or a small defined copayment amount (\$2.50 in 2011 for generic or preferred multisource drugs and \$6.30 in 2011 for other drugs). The benefit parameters are indexed annually to the growth in average per capita Part D costs. Beneficiaries meeting certain low-income and limited-resources requirements pay substantially reduced cost-sharing amounts. In determining out-of-pocket costs, only those amounts actually paid by the enrollee or another individual (and not reimbursed through insurance) are counted; the exceptions to this “true out-of-pocket” provision are cost-sharing assistance from the low-income subsidies provided under Part D and from State Pharmacy Assistance programs and, starting in 2011, the 50-percent discount on brand-name drugs purchased by enrollees in the Part D coverage gap. Many Part D plans offer alternative coverage that differs from the standard coverage described above. In fact, the majority of beneficiaries are not enrolled in the standard benefit design but rather in plans with low or no deductibles, flat payments for covered drugs, and, in some cases, additional partial coverage in the coverage

gap. The monthly premiums required for Part D coverage are described in the previous section.

Payments to Providers

Before 1983, Part A payments to providers were made on a reasonable cost basis. Medicare payments for most inpatient hospital services are now made under a reimbursement mechanism known as the prospective payment system (PPS). Under the PPS for acute inpatient hospitals, each stay is categorized into a diagnosis-related group (DRG). Each DRG has a specific predetermined amount associated with it, which serves as the basis for payment. A number of adjustments are applied to the DRG's specific predetermined amount to calculate the payment for each stay. In some cases the payment the hospital receives is less than the hospital's actual cost for providing Part A-covered inpatient hospital services for the stay; in other cases it is more. The hospital absorbs the loss or makes a profit. Certain payment adjustments exist for extraordinarily costly inpatient hospital stays and other situations. Payments for skilled nursing care, home health care, inpatient rehabilitation hospital care, long-term care hospitals, inpatient psychiatric hospitals, and hospice are made under separate prospective payment systems.

For nonphysician Part B services, home health care is reimbursed under the same prospective payment system as Part A, most hospital outpatient services are reimbursed on a separate prospective payment system, and most payments for clinical laboratory and ambulance services are based on fee schedules. A fee schedule is a comprehensive listing of maximum fees used to pay providers. Most durable medical equipment has also been paid on a fee schedule in recent years but is to be paid based on a competitive bidding process in some areas beginning January 1, 2011. This competitive bidding process will be expanded to all areas within the next several years.

In general, the prospective payment systems and fee schedules used for Part A and non-physician Part B services are increased each year either by indices related to the "market basket" of goods and services that the provider must purchase or by indices related to the Consumer Price Index (CPI). These indices vary by type of provider. The Affordable Care Act mandates that these payment updates be decreased in all future years, in some cases by stipulated amounts during 2010–2019, and in all cases by the growth in economywide productivity, during this 10-year period and afterward. It is likely that the lower payment increases will not be viable in the long range. The best available evidence indicates that most health care providers cannot improve their productivity to this degree because of the labor-intensive nature of most of these services.

For Part B, before 1992, physicians were paid on the basis of reasonable charge. This amount was initially defined as the lowest of (1) the physician's actual charge, (2) the physician's customary charge, or (3) the prevailing charge for similar services in that locality. Since January 1992, allowed charges have been defined as the lesser of (1) the submitted charges or (2) the amount determined by a fee schedule based on a relative value scale (RVS). In practice, most allowed charges are based on the fee schedule, which is supposed to be updated each year by a Sustainable Growth Rate (SGR) system prescribed in the law. However, over the past 8 years, the SGR system would have required significant fee reductions for physicians, and Congress has passed a series of bills to override the reductions.

If a doctor or supplier agrees to accept the Medicare-approved rate as payment in full ("takes assignment"), then payments provided must be considered as payments in full for that service. The provider may not request any added payments (beyond the initial annual deductible and coinsurance) from the beneficiary or insurer. If the provider does not take assignment, the beneficiary will be charged for the excess (which may be paid by Medigap insurance). Limits now exist on the excess that doctors or suppliers can charge. Physicians are "participating physicians" if they agree before the beginning of the year to accept assignment for all Medicare services they furnish during the year. Since beneficiaries in the original Medicare fee-for-service program may select their doctors, they can choose participating physicians.

Medicare Advantage plans and their precursors have generally been paid on a capitation basis, meaning that a fixed, predetermined amount per month per member is paid to the plan, without regard to the actual number and nature of services used by the members. The specific mechanisms to determine the payment amounts have changed over the years. In 2006, Medicare began paying capitated payment rates to plans based on a competitive bidding process.

For Part D, each month for each plan member, Medicare pays stand-alone PDPs and the prescription drug portions of Medicare Advantage plans their risk-adjusted bid, minus the enrollee premium. Plans also receive payments representing premiums and cost-sharing amounts for certain low-income beneficiaries for whom these items are reduced or waived. Under the reinsurance provision, plans receive payments for 80 percent of costs in the catastrophic coverage category.

To help them gain experience with the Medicare population, Part D plans are protected by a system of "risk corridors" that allow Medicare to assist with unexpected

costs and to share in unexpected savings. The risk corridors became less protective after 2007.

Under Part D, Medicare provides certain subsidies to employer and union PDPs that continue to offer coverage to Medicare retirees and meet specific criteria in doing so. These retiree drug subsidy (RDS) payments are tax-exempt, but under the Affordable Care Act, they will be taxable beginning in 2013.

Claims Processing

Medicare's Part A and Part B fee-for-service claims are processed by nongovernment organizations or agencies that contract to serve as the fiscal agent between providers and the federal government. These claims processors are known as intermediaries and carriers. They apply the Medicare coverage rules to determine the appropriateness of claims.

Medicare intermediaries process Part A claims for institutional services, including inpatient hospital claims, SNFs, HHAs, and hospice services. They also process outpatient hospital claims for Part B. Examples of intermediaries are Blue Cross and Blue Shield (which utilize their plans in various states) and other commercial insurance companies. Intermediaries' responsibilities include:

- Determining costs and reimbursement amounts,
- Maintaining records,
- Establishing controls,
- Safeguarding against fraud and abuse or excess use,
- Conducting reviews and audits,
- Making the payments to providers for services, and
- Assisting both providers and beneficiaries as needed.

Medicare carriers handle Part B claims for services by physicians and medical suppliers. Examples of carriers are the Blue Shield plans in a state and various commercial insurance companies. Carriers' responsibilities include:

- Determining charges allowed by Medicare,
- Maintaining quality-of-performance records,
- Assisting in fraud and abuse investigations,
- Assisting both suppliers and beneficiaries as needed, and
- Making payments to physicians and suppliers for services that are covered under Part B.

Claims for services provided by Medicare Advantage plans (that is, claims under Part C) are processed by the plans themselves.

Part D plans are responsible for processing their claims, akin to Part C. However, because of the "true out-of-pocket" provision discussed previously, the Centers for Medicare & Medicaid Services (CMS) has contracted the services of a facilitator, who works with CMS, Part D drug plans (stand-alone PDPs and the prescription drug portions of Medicare Advantage plans), and carriers of supplemental drug coverage to coordinate benefit payments and track the sources of cost-sharing payments. Claims under Part D also have to be submitted by the plans to CMS, so that certain payments based on actual experience (such as payments for low-income cost-sharing and premium subsidies, reinsurance, and risk corridors) can be determined.

Because of its size and complexity, Medicare is vulnerable to improper payments, ranging from inadvertent errors to outright fraud and abuse. Although providers are responsible for submitting accurate claims, and intermediaries and carriers are responsible for ensuring that only such claims are paid, there are additional groups whose duties include the prevention, reduction, and recovery of improper payments.

Quality improvement organizations (QIOs, formerly called peer review organizations or PROs) are groups of practicing health care professionals who are paid by the federal government to improve the effectiveness, efficiency, economy, and quality of services delivered to Medicare beneficiaries. One function of QIOs is to ensure that Medicare pays only for services and goods that are reasonable and necessary and that are provided in the most appropriate setting.

The ongoing effort to address improper payments intensified after enactment of the Health Insurance Portability and Accountability Act (HIPAA) of 1996 (Public Law 104-191), which created the Medicare Integrity Program (MIP). The MIP provides CMS with dedicated funds to identify and combat improper payments, including those caused by fraud and abuse, and, for the first time, allows CMS to award contracts competitively with entities other than carriers and intermediaries to conduct these activities. MIP funds are used for (1) audits of cost reports, which are financial documents that hospitals and other institutions are required to submit annually to CMS; (2) medical reviews of claims to determine whether services provided are medically reasonable and necessary; (3) determinations of whether Medicare or other insurance sources have primary responsibility for payment; (4) identification and investigation of potential fraud cases; and (5) education to inform providers about appropriate billing procedures. In addition to creating the

MIP, HIPAA established a fund to provide resources for the Department of Justice—including the Federal Bureau of Investigation—and the Office of Inspector General (OIG) within the Department of Health and Human Services (HHS) to investigate and prosecute health care fraud and abuse.

The Deficit Reduction Act (DRA) of 2005 (Public Law 109-171) established and funded the Medicare-Medicaid Data Match Program, which is designed to identify improper billing and utilization patterns by matching Medicare and Medicaid claims information. As is the case under the MIP, CMS can contract with third parties. The funds also can be used (1) to coordinate actions by CMS, the states, the Attorney General, and the HHS OIG to prevent improper Medicaid and Medicare expenditures and (2) to increase the effectiveness and efficiency of both Medicare and Medicaid through cost avoidance, savings, and the recoupment of fraudulent, wasteful, or abusive expenditures.

The Affordable Care Act includes many provisions intended to improve the accuracy of payments and to link those payments to quality and efficiency in the Medicare program. One of the most important provisions establishes the Center for Medicare and Medicaid Innovation (CMI) in CMS to test innovative payment and service delivery models, with the goal of reducing Medicare, Medicaid, and the Children's Health Insurance Program (CHIP) expenditures while preserving or enhancing quality of care.

Administration

HHS has the overall responsibility for administration of the Medicare program. Within HHS, responsibility for administering Medicare rests with CMS. The Social Security Administration (SSA) assists, however, by initially determining an individual's Medicare entitlement, by withholding Part B premiums from the Social Security benefit checks of most beneficiaries, and by maintaining Medicare data on the Master Beneficiary Record, which is SSA's primary record of beneficiaries.

The MMA requires SSA to undertake a number of additional Medicare-related responsibilities, including making low-income subsidy determinations under Part D, notifying individuals of the availability of Part D subsidies, withholding Part D premiums from monthly Social Security cash benefits for beneficiaries who request such an arrangement, and, for 2007 and later, determining the individual's Part B premium if the Part B income-related monthly adjustment applies. For 2011 and later, the Affordable Care Act will also require SSA to determine the individual's Part D premium if the Part D income-related monthly adjustment applies. The Internal Reve-

nue Service (IRS) in the Department of the Treasury collects the Part A payroll taxes from workers and their employers. IRS data, in the form of income tax returns, play a role in determining which Part D enrollees are eligible for low-income subsidies (and to what degree) and which Part B and Part D enrollees are subject to the income-related monthly adjustment amounts in their premiums (and to what degree).

A Medicare Board of Trustees, composed of two appointed members of the public and four members who serve by virtue of their positions in the federal government, oversees the financial operations of the HI and SMI trust funds. The Secretary of the Treasury is the managing trustee. Each year, around the first day of April, the Board of Trustees reports to Congress on the financial and actuarial status of the Medicare trust funds.

State agencies (usually state health departments under agreements with CMS) identify, survey, and inspect provider and supplier facilities and institutions wishing to participate in the Medicare program. In consultation with CMS, these agencies then certify the facilities that are qualified.

Medicare Financial Status

Medicare is the largest health care insurance program—and the second-largest social insurance program—in the United States. Medicare is also complex, and it faces a number of financial challenges in both the short term and the long term. These challenges include:

- The solvency of the HI trust fund, which fails the Medicare Board of Trustees' test of short-range financial adequacy, as annual expenditures are projected to exceed annual assets within 10 years.
- The long-range health of the HI trust fund, as the trust fund fails the Trustees' long-range test of close actuarial balance.
- The rapid growth projected for SMI costs as a percent of Gross Domestic Product. (The Part B and Part D accounts in the SMI trust fund are automatically in financial balance—in both the short range and the long range—since premiums and general revenue financing rates are reset each year to match estimated costs.)
- The Part B premium situation in 2010 and 2011, whereby about one-quarter of Part B enrollees are subject to above-average premium increases while the other three-quarters are not subject to a premium increase at all (because of the zero-percent cost-of-living increase for Social Security benefits and the "hold-harmless" provision for Part B, discussed above).

- The substantial reductions in Part B physician payment rates required under the Sustainable Growth Rate system in current law. In recent years, Congress has consistently passed legislation that overrides the reductions (also discussed above).
- The likelihood that the lower payment rate updates to most categories of Medicare providers for 2011 and later, as mandated by the Affordable Care Act, will not be viable in the long range (also discussed above).

A detailed description of these issues is beyond the scope of this summary. For more information, see the Medicare Trustees Report (<https://www.cms.gov/ReportsTrustFunds/>).

Data Summary

The Medicare program covers 95 percent of our nation's aged population, as well as many people who receive Social Security disability benefits. In 2009, Part A covered almost 46 million enrollees with benefit payments of \$239.3 billion, Part B covered almost 43 million enrollees with benefit payments of \$202.6 billion, and Part D covered over 33 million enrollees with benefit payments of \$60.5 billion. Administrative costs in 2009 were about 1.3 percent, 1.5 percent, and 0.5 percent of expenditures for Part A, Part B, and Part D, respectively. Total expenditures for Medicare in 2009 were \$509.0 billion.

Medicare: History of Provisions

This section is a summary of selected Medicare provisions, based on general interest, as of November 1, 2010. It should be used only as a broad overview of the history of the provisions of the Medicare program. This section does not render any legal, accounting, or other professional advice and is not intended to explain fully all the provisions and exclusions of the relevant laws, regulations, and rulings of the Medicare program. Original sources of authority should be researched and utilized.

Insured Status

Entitlement to Medicare Part A (also known as Hospital Insurance, or HI) Benefits

- 1965.** Individual aged 65 or older entitled to monthly benefits under the Social Security or Railroad Retirement program, or aged 65 before 1968, or 3 quarters of coverage (QC) after 1965 and before attainment of age 65.
- 1967.** Three QC for each year after 1966 and before attainment of age 65.

1972. Disabled individual, under age 65, entitled to disability benefits for 24 consecutive months under the Social Security or Railroad Retirement program (excludes spouses and children of disabled individuals). Individual under age 65 who has end-stage renal disease (ESRD) and who is either fully or currently insured, or is entitled to monthly benefits under the Social Security or Railroad Retirement program, or is the spouse or dependent child of such an insured individual or beneficiary. Entitlement begins on the first day of the third month following the initiation of a course of renal dialysis and ends with the 12th month following the month in which either the dialysis terminates or the individual has a renal transplant.

Individual aged 65 or older enrolled in the Part B program who is not otherwise entitled to HI benefits, upon voluntary participation with payment of HI premium.

1980. Individual who would be entitled to monthly benefits under the Social Security or Railroad Retirement program if application were made.

Disabled individual under age 65 entitled to disability benefits for at least 24 months, not necessarily consecutive, under the Social Security or Railroad Retirement program.

Coverage extended for up to 36 months for disabled individuals whose disability continues but whose monthly benefit ceased because they engaged in substantial gainful activity.

Second waiting period eliminated if a former disabled-worker beneficiary becomes entitled again within 5 years (7 years for disabled widows and widowers and disabled children aged 18 or older).

1982. Federal employees covered under HI on the basis of QC for earnings as federal employees or on the basis of deemed QC for earnings as federal employees before 1983.

1983. Employees of nonprofit organizations, effective January 1, 1984.

1986. Mandatory coverage for state and local government employees not covered under Social Security and hired after March 31, 1986.

1987. Second waiting period eliminated if a former disabled beneficiary becomes entitled again (no time limit).

1989. Disabled individuals under age 65 who are no longer entitled to Social Security disability benefits because their earnings exceeded the substantial gainful activity level have the option to purchase Medicare coverage by paying the HI and Supplementary Medical Insurance (SMI) Part B premiums.

2000. The 24-month waiting period (otherwise required for an individual to establish Medicare eligibility on the basis of a disability) is waived for persons with amyotrophic lateral sclerosis, effective July 1, 2001. The entitlement to Medicare begins with the first month of the Social Security Administration's determination of eligibility for Disability Insurance benefits.

2010. Individuals in the vicinity of Libby, Montana who are diagnosed with an asbestos-related condition are Medicare-eligible beginning March 30, 2010. Medicare eligibility could also apply to individuals in other areas who are diagnosed with a medical condition caused by exposure to a public health hazard for which a future public health emergency is declared under the Comprehensive Environmental Response, Compensation, and Liability Act of 1980.

Entitlement to Medicare Part B (also known as Supplementary Medical Insurance Part B Account, or SMI Part B) Benefits

1965. U.S. resident (citizen or lawfully admitted alien with 5 years continuous residence) aged 65 or older or any individual entitled to HI benefits, upon voluntary participation with payment of Part B premium.

1972. Individual under age 65 entitled to HI benefits, upon voluntary participation with payment of Part B premium.

Entitlement to Medicare Part D (also known as Supplementary Medical Insurance Part D Account, or SMI Part D) Benefits

2003. For temporary Medicare-endorsed prescription drug discount card program (as a prelude to the new Part D prescription drug program), individual entitled or enrolled under Part A or enrolled in Part B, except those enrolled in Medicaid and entitled to Medicaid outpatient drug coverage, upon voluntary participation with payment of up to \$30 annual enrollment fee. Under a Transitional Assistance provision, a drug card-eligible beneficiary whose income does not exceed 135 percent of the federal poverty level and does not have third-party prescription drug coverage is entitled to further benefits. Enrollment begins in May 2004, access to discounts begins in June 2004, and program phases out as drug benefit becomes available in 2006 (see next entry).

Beginning January 1, 2006, individual entitled to benefits under Part A or enrolled under Part B, upon voluntary enrollment (including payment of Part D premium, if applicable) in either a stand-alone PDP or an integrated Medicare Advantage plan that offers Part D coverage in its benefit package.

Medicare Benefits

Under Part A

1965. In each benefit period, inpatient hospital services, 90 days. Includes semiprivate accommodations, operating room, hospital equipment (including renal dialysis), laboratory tests and X-ray, drugs, dressings, general nursing services, and services of interns and residents in medical osteopathic or dentistry training. Inpatient psychiatric hospital care limited to 190-day lifetime maximum. Outpatient hospital diagnostic services. Post-hospital extended-care services, 100 days (including physical, occupational, and speech therapy). Post-hospital home health services, 100 visits. Deductible and coinsurance provisions (see Table 2.C1).

1967. Lifetime reserve of 60 additional days of inpatient hospital services. Outpatient hospital diagnostic services transferred to SMI.

1972. Services of interns and residents in podiatry training.

1980. Unlimited home health visits in a year. Requirement for prior hospitalization eliminated. Home health services provided for up to 4 days a week and up to 21 consecutive days.

Alcohol detoxification facility services.

1981. Part A coinsurance is based on the deductible for the calendar year in which services are received rather than the deductible in effect at the time the beneficiary's spell of illness began, starting in 1982.

Alcohol detoxification facility services eliminated.

1982. Beneficiaries expected to live 6 months or less may elect to receive hospice care benefits instead of other Medicare benefits. May elect maximum of two 90-day and one 30-day hospice care periods, effective November 1, 1983, to October 1, 1986.

1984. For durable medical equipment provided by home health agencies, the payment amount is reduced from 100 percent of costs to 80 percent of reasonable charges.

1986. Set the Part A deductible for 1987 at \$520 with resulting increases in cost sharing. Increased the Part A deductible annually by the applicable percentage increase in the hospital prospective payment rates.

Hospice care benefit (enacted in 1982) made permanent.

1987. Specifies in law that to be eligible for home health care, a Medicare beneficiary must have a restricted ability to leave the home, requiring the assistance of

another or the aid of a supportive device (such as crutches, a cane, a wheelchair, or a walker).

1988. Enrollee pays annual hospital deductible (set at \$560 for 1989) and Medicare pays balance of covered charges, regardless of the number of days of hospitalization (except for psychiatric hospital care, which is still limited by 190-day lifetime maximum).

The number of days in a skilled nursing facility (SNF) changed to 150 per year. Deletes the requirement for a prior hospital stay of 3 or more consecutive days.

Expands home health care to provide care for less than 7 days per week and up to 38 consecutive days.

Hospice care extended beyond 210 days when beneficiary is certified as terminally ill.

All 1988 provisions became effective January 1, 1989.

1989. The spell of illness and benefit period coverage of laws before 1988 return to the determination of inpatient hospital benefits in 1990 and later. After the deductible is paid in benefit period, Medicare pays 100 percent of covered costs for the first 60 days of inpatient hospital care. Coinsurance applies for the next 30 days in a benefit period.

The requirement for a prior hospital stay of 3 or more consecutive days is reinstated for SNF services. Coverage returns to 100 days post-hospital care per spell of illness with a daily coinsurance rate in effect for days 21 through 100.

Home health services return to a limit of 21 consecutive days of care. Provision providing for home health care for fewer than 7 days per week continued due to a court decision.

Hospice care is returned to a lifetime limit of 210 days.

1990. Hospice care is extended beyond 210 days when beneficiary is certified as terminally ill.

1997. Home health services not associated with a hospital or SNF stay for individuals enrolled in both HI and SMI are transferred from the HI program to the SMI program, effective January 1998. The HI program will continue to cover the first 100 visits following a hospital stay of at least 3 consecutive days or an SNF stay. The cost to the SMI trust fund of the transferred services will phase in over a 6-year period (that is, the HI trust fund will transfer funds to the SMI trust fund during that period).

Limits on the number of hours and days that home health care can be provided have been clarified. *Part-time* now defined as skilled nursing and home health aide services (combined) furnished any number of days per week, for less than 8 hours per day

and 28 or fewer hours per week. *Intermittent* now defined as skilled nursing care provided for fewer than 7 days each week, or less than 8 hours each day (combined) for 21 days or less.

Hospice benefit periods are restructured to include two 90-day periods, followed by an unlimited number of 60-day periods.

Medicare coverage provided for a number of prevention initiatives, most of which are covered under SMI program. HI program affected mainly by two of the initiatives: (1) annual prostate cancer screening for male beneficiaries aged 50 or older, effective January 1, 2000, and (2) colorectal screening procedures, including fecal-occult blood tests and flexible sigmoidoscopies, for beneficiaries aged 50 or older, colonoscopy for beneficiaries at high risk for colorectal cancer, and other procedures, including screening barium enemas under certain circumstances.

2000. The homebound criterion for home health services is clarified to specify that beneficiaries who require home health services may attend adult day care for therapeutic, psychosocial, or medical treatment and still remain eligible for the home health benefit. Homebound beneficiaries may also attend religious services without being disqualified from receiving home health benefits.

Screening colonoscopies are covered for all beneficiaries, not just for those at high risk, beginning July 1, 2001. For persons not at high risk, a screening colonoscopy is covered 10 years after a previous one, or 4 years after a screening flexible sigmoidoscopy. (See 1997.)

Under Part B

1965. Physician and surgeon services. In-hospital services of anesthesiologists, pathologists, radiologists, and psychiatrists. Limited dental services. Home health services, 100 visits in calendar year. Other medical services including various diagnostic tests, limited ambulance services, prosthetic devices, rental of durable medical equipment used at home (including equipment for dialysis), and supplies used for fractures. For deductible and coinsurance provisions, see Table 2.C1.

Beginning in 1966, the beneficiary pays a \$50 deductible, with a 3-month carryover provision.

1967. Outpatient hospital diagnostic services transferred from HI. Includes physical therapy services in a facility. Purchase of durable medical equipment.

1972. Physical therapy services furnished by a therapist in his or her office or individual's home (calendar year limit of \$100). Chiropractor services (limited to manual manipulation of the spine). Outpatient services

include speech pathology services furnished in, or under arrangements with, a facility or agency. Services of a doctor of optometry in furnishing prosthetic lenses.

Beginning in 1973, the beneficiary pays a \$60 deductible.

1977. Services in rural health clinics.

1980. Home health services. Deductible applicable to home health services is eliminated, effective July 1, 1981.

Facility costs of certain surgical procedures performed in freestanding ambulatory surgical centers.

Increase in annual limit for outpatient therapy from \$100 to \$500.

Recognizes comprehensive outpatient rehabilitation facilities as Medicare providers.

1981. Beginning in 1982, the beneficiary pays a \$75 deductible, with the carryover provision eliminated.

1984. Hepatitis B and pneumococcal vaccines and blood clotting factors and necessary supplies are included as Part B benefits. Debridement of mycotic toenails is limited.

For outpatient physical therapy services, includes services of a podiatrist. For outpatient ambulatory surgery, includes services of a dentist and podiatrist furnished in his or her office.

1986. Includes vision care services furnished by an optometrist.

For occupational therapy services, includes services furnished in an SNF (when Part A coverage has been exhausted), in a clinic, rehabilitation agency, public health agency, or by an independently practicing therapist.

Includes outpatient (in addition to previously covered inpatient) immunosuppressive drugs for 1 year after covered transplant.

Includes occupational therapy services provided in certain delivery settings.

For ambulatory surgical procedures performed in ambulatory surgical centers, hospital outpatient departments, and certain physician offices, the Part B coinsurance and deductible are no longer waived.

1987. Increases the maximum payment for mental health services and includes outpatient mental health services provided by ambulatory hospital-based or hospital-affiliated programs under the supervision of a physician.

Services provided by clinical social workers when furnished by risk-sharing HMOs and competitive medical plans, physician assistants in rural health manpower shortage areas, clinical psychologists in rural health clinics and community mental health centers, and certified nurse midwives.

Coverage of outpatient immunosuppressive drugs (see 1986) is broadened and clarified to include prescription drugs used in immunosuppressive therapy.

Specifies in law that to be eligible for home health care, a Medicare beneficiary must have a restricted ability to leave the home, requiring the assistance of another or the aid of a supportive device (such as crutches, a cane, a wheelchair, or a walker).

1988. Beginning January 1, 1990, the beneficiary pays a \$75 deductible and 20 percent coinsurance, but once out-of-pocket expenses for the deductible and coinsurance exceed \$1,370, Medicare pays 100 percent of allowable charges for remainder of year.

Beginning in 1991, Medicare pays 50 percent of the cost of outpatient prescription drugs above \$600. When fully implemented in 1993, Medicare will pay 80 percent of prescription drug costs above a deductible that assumes that 16.8 percent of Part B enrollees will exceed the deductible.

Certain prescription drugs administered in an outpatient or home setting, including immunosuppressive drugs (previously covered for 1 year after a covered transplant), home intravenous drugs, and certain others, will be covered in 1990 under a new prescription drug provision.

1989. Provisions enacted in 1988 and to begin in 1990 and 1991 are repealed, and benefits are restored to levels in effect before January 1, 1989.

Limits on mental health benefits eliminated in 1990. Coverage extended to services of clinical psychologists and social workers.

The annual payment limits of \$500 per beneficiary for outpatient physical therapy services and outpatient occupational therapy services, each, are raised to \$750 for 1990 and later. (See 1980.)

1990. Beginning in 1991, routine mammography screenings are covered.

The Part B deductible is set at \$100 in 1991 and subsequent years.

Beginning in 1992, physicians' services are reimbursed on a fee-schedule basis.

1993. Includes coverage of oral, self-administered anticancer drugs.

Lengthens the coverage period for immunosuppressive drugs after a transplant to 18 months in 1995, 24 months in 1996, 30 months in 1997, and 36 months thereafter. (See 1986.)

The annual payment limits of \$750 per beneficiary for outpatient physical therapy services and outpatient occupational therapy services, each, are raised to \$900 for 1994 and later. (See 1989.)

1997. Home health services not associated with a hospital or SNF stay for individuals enrolled in both HI and SMI are transferred from the HI program to the SMI program, effective January 1998. The HI program will continue to cover the first 100 visits following a hospital stay of at least 3 consecutive days or an SNF stay. The cost to the SMI trust fund of the transferred services will phase in over a 6-year period, while the cost of the home health services will phase into the SMI premium over 7 years.

Coverage provided for a number of prevention initiatives, including (1) annual screening mammograms for female beneficiaries aged 40 or older, with SMI deductible waived; (2) screening pap smear and pelvic exam (including clinical breast exam) every 3 years or annually for beneficiaries at higher risk, with SMI deductible waived; (3) annual prostate cancer screening for male beneficiaries aged 50 or older, effective January 1, 2000; (4) colorectal screening procedures, including fecal occult blood tests and flexible sigmoidoscopies, for beneficiaries aged 50 or older, colonoscopy for beneficiaries at high risk for colorectal cancer, and other procedures, including screening barium enemas under certain circumstances; (5) diabetes outpatient self-management training in nonhospital-based programs (previously covered in hospital-based programs only) and blood glucose monitors and testing strips for all diabetics (previously provided for insulin-dependent diabetics only), effective July 1, 1998; (6) procedures to identify bone mass, detect bone loss, or determine bone quality for certain qualified beneficiaries, at frequencies determined by the secretary of Health and Human Services, effective July 1, 1998.

Beginning January 1999, an annual beneficiary limit of \$1,500 will apply to all outpatient physical therapy services, except for services furnished by a hospital outpatient department. A separate \$1,500 limit will also apply to outpatient occupational therapy services, except for services furnished by hospital outpatient departments. Beginning with 2002, these caps will be increased by the percentage increase in the Medical Economic Index. (See 1993.)

1999. The coverage period for immunosuppressive drugs after a transplant is lengthened to 44 months, for individuals who exhaust their 36 months of coverage

in 2000. For those exhausting their 36 months of coverage in 2001, at least 8 more months will be covered. (The secretary of Health and Human Services will specify the increase, if any, beyond 8 months.) For those exhausting their 36 months of coverage in 2002, 2003, or 2004, the number of additional months may be more or fewer than 8. (The secretary will specify the increase for each of these years.) (See 1993.)

The annual payment limits of \$1,500 per beneficiary for outpatient physical therapy services and outpatient occupational therapy services, each, for services furnished by independent practitioners (that is, not by a hospital outpatient department) are suspended for 2000 and 2001. (See 1997.)

2000. Coverage for screening pap smears and pelvic exams (including a clinical breast exam) is provided every 2 years (increased from every 3 years) beginning July 1, 2001. (Annual coverage continues for beneficiaries at higher risk, and SMI deductible continues to be waived.) (See 1997.)

Annual coverage of glaucoma screenings is provided for certain high-risk beneficiaries, effective January 1, 2002.

Screening colonoscopies are covered for all beneficiaries, not just for those at high risk, beginning July 1, 2001. For persons not at high risk, a screening colonoscopy is covered 10 years after a previous one, or 4 years after a screening flexible sigmoidoscopy. (See 1997.)

Coverage is provided for medical nutrition therapy services under certain circumstances for beneficiaries who have diabetes or a renal disease, effective January 1, 2002.

The amount of a beneficiary's copayment for a procedure in a hospital outpatient department is limited, beginning April 1, 2001, to the hospital inpatient deductible applicable for that year. Also, the secretary of Health and Human Services must reduce the effective copayment rate for outpatient services to a maximum rate of 57 percent in 2001 (for services received after April 1), 55 percent in 2002 and 2003, 50 percent in 2004, 45 percent in 2005, and 40 percent in 2006 and later.

Time and budget limitations are removed on the coverage of immunosuppressive drugs, making coverage of these drugs a permanent benefit for beneficiaries who have received a covered organ transplant. (See 1999.)

The annual payment limits of \$1,500 per beneficiary for outpatient physical therapy services and outpatient occupational therapy services, each, for services provided by independent practitioners (that is,

not by a hospital outpatient department), which were suspended for 2000 and 2001, are also suspended for 2002. (See 1999.)

The homebound criterion for home health services is clarified to specify that beneficiaries who require home health services may attend adult day care for therapeutic, psychosocial, or medical treatment and still remain eligible for the home health benefit. Homebound beneficiaries may also attend religious services without being disqualified from receiving home health benefits.

2003. The Part B deductible remains at \$100 through 2004 and increases to \$110 in 2005. Beginning in 2006, it will be increased each year by the annual percentage increase in the Part B aged actuarial rate.

A one-time, initial preventive physical exam is covered within 6 months of a beneficiary's first coverage under Part B, beginning January 1, 2005, for beneficiaries whose Part B coverage begins on or after that date.

Certain screening blood tests are covered for the early detection of cardiovascular disease and abnormalities associated with elevated risk for such disease, including certain tests for cholesterol and other lipid or triglyceride levels, effective January 1, 2005, under frequency standards to be established (but not to exceed once every 2 years).

Diabetes screening tests, including a fasting plasma glucose test and other such tests determined appropriate by the secretary of Health and Human Services, are covered for beneficiaries at risk for diabetes, beginning January 1, 2005, under frequency standards to be established (but not to exceed two times per year).

2005. The colorectal screening benefit (see 1997 and 2000) is exempt from the Part B deductible, effective January 2007.

Exceptions to the financial limits on therapy services not provided by a hospital outpatient department are allowed for services furnished in 2006, if such services are determined to be medically necessary. (See 1997, 1999, and 2000.)

2006. Exceptions to the financial limits on nonhospital therapy services when deemed medically appropriate are extended through December 31, 2007. (See 2005.)

2007. Exceptions to the financial limits on nonhospital therapy services when deemed medically appropriate are extended through July 1, 2008. (See 2005 and 2006).

2008. For outpatient mental health services, the percentage of approved charges for which the beneficiary is liable phases down from 50 percent to 20 percent, over the 5-year period 2010–2014.

For the one-time, initial preventive examination (see 2003), the Part B deductible is waived, the eligibility period is extended from 6 months to 1 year after enrollment in Part B, measurement of body mass index is covered, and, upon agreement with the beneficiary, end-of-life planning is covered. Effective January 1, 2009.

Exceptions to the financial limits on nonhospital therapy services when deemed medically appropriate are extended through December 31, 2009. (See 2005, 2006, and 2007.)

2009. Exceptions to the financial limits on nonhospital therapy services when deemed medically appropriate are extended through March 31, 2010. (See 2005, 2006, 2007, and 2008.)

2010. An annual wellness visit to develop or update a personalized prevention plan is covered, with no beneficiary cost sharing, effective January 1, 2011.

Beneficiary cost sharing is eliminated for preventive services recommended with a grade of A or B by the U.S. Preventive Services Task Force, and the Part B deductible is waived for colorectal cancer screening tests, both effective January 1, 2011.

Exceptions to the financial limits on nonhospital therapy services when deemed medically appropriate are extended through December 31, 2010. (See 2005, 2006, 2007, 2008, and 2009.)

Under Parts A and B

1965. Requires that Medicare be secondary payer to benefits provided by liability insurance policies or under no-fault insurance.

1981. Requires that Medicare be secondary payer to employer-based group health plans for beneficiaries entitled to Medicare solely on the basis of end-stage renal disease (ESRD) for up to 12 months.

1982. For workers and their spouses aged 65 to 69, Medicare is the secondary payer when benefits are provided under an employer-based group health plan (applicable to employers with 20 or more employees who sponsor or contribute to the group plan).

Health maintenance organizations (HMOs) will be authorized as providers of benefits. The secretary of Health and Human Services must certify the prospective payment mechanism for HMOs before implementation.

- 1984.** Medicare secondary-payer provisions are extended to spouses aged 65 to 69 of workers under age 65 whose employer-based group health plan covers such spouses.
- For HMOs, includes medical and other health services furnished by clinical psychologists.
- 1985.** Provides payment for liver transplant services.
- 1986.** Extends the working-age, secondary-payer provision to cover workers and their spouses beyond age 69.
- For HMOs that offered organ transplants as a basic health service on April 15, 1985, such services may be offered from October 1, 1985, through April 1, 1988.
- For disabled individuals who are covered by employer-based health plans (with at least 100 employees), Medicare is the secondary payer, effective for the period from 1987 to 1991.
- 1987.** Requires HMOs and competitive medical plans that cease to contract with Medicare to provide or arrange supplemental coverage of benefits related to preexisting conditions for the lesser of 6 months or the duration of an exclusion period.
- Specifies in law that to be eligible for home health care, a Medicare beneficiary must have a restricted ability to leave the home, requiring the assistance of another or the aid of a supportive device (such as crutches, a cane, a wheelchair, or a walker).
- Clarifies that the secondary-payer provision for disabled individuals covered under employer-based health plans for employers with at least 500 employees applies to employers who are government entities.
- 1990.** Requires that Medicare be the secondary payer to employer-based group health plans for beneficiaries entitled to Medicare solely on the basis of ESRD for up to 18 months (extended from 12 months), effective February 1, 1991, to January 1, 1996.
- The secondary-payer provision for disabled beneficiaries covered under large employer plans (see 1986) is effective through September 30, 1995.
- 1993.** The secondary-payer provision for disabled beneficiaries covered under large employer plans is effective through September 30, 1998.
- The secondary-payer provision for beneficiaries with ESRD applies to all beneficiaries with end-stage renal disease, not only those entitled to Medicare solely on the basis of ESRD. The extension to include the first 18 months of an individual's entitlement on the basis of ESRD is effective through September 30, 1998.
- 1996.** The Medicare Integrity Program (MIP) is created, providing dedicated funds to identify and combat improper payments, including those caused by fraud and abuse, and, for the first time, allowing for contracts to be awarded competitively to entities other than carriers and intermediaries to conduct these activities.
- 1997.** Established an expanded set of options for the delivery of health care under Medicare, referred to as Medicare+Choice (and also known as "Medicare Part C"). All Medicare beneficiaries can receive their Medicare benefits through the original fee-for-service program. In addition, most beneficiaries can choose instead to receive their Medicare benefits through one of the following Medicare+Choice plans: (1) coordinated care plans (such as HMOs, provider-sponsored organizations, and PPOs), (2) Medical Savings Account (MSA)/High Deductible plans (through a demonstration available for up to 390,000 beneficiaries), or (3) private fee-for-service plans. Except for MSA plans, all Medicare+Choice plans are required to provide the current Medicare benefit package (excluding hospice services) and any additional health services required under the adjusted community rate (ACR) process. MSA plans provide Medicare benefits after a single high deductible is met, and enrollees receive an annual deposit in their medical savings account. Transition rules for current Medicare HMO program also provided. (See also HMO provision of 1982.)
- The provision making Medicare the secondary payer for disabled beneficiaries covered under large employer plans, previously scheduled to expire September 30, 1998, made permanent.
- The provision making Medicare the secondary payer for the first 12 months of entitlement because of ESRD, which had been extended on a temporary basis (through September 30, 1998) to include the first 18 months of entitlement, has been extended, permanently, to include the first 30 months of entitlement on the basis of ESRD.
- 2003.** Medicare+Choice is renamed Medicare Advantage. (It is still sometimes referred to as "Medicare Part C.") As before, beneficiaries enrolled in both Part A and Part B can receive their Medicare benefits through the original fee-for-service program; most can opt instead to use a Medicare Advantage plan in their area. Medicare Advantage plans include (1) Medicare Managed Care plans (like HMOs), (2) Medicare Preferred Provider Organization plans (PPOs), (3) Private Fee-for-Service plans, and (4) Medicare Specialty plans (available in some areas to provide Medicare benefits for certain people with special needs, such as beneficiaries in institutions). Beginning in 2006, Medicare Advantage plan

choices will be expanded to include regional PPOs. Participating regional PPOs will be required to serve an entire region (10 to 50 regions are to be established), and there are provisions to encourage plan participation. Regional PPOs must have a single deductible for benefits under Parts A and B, and they must include catastrophic limits for out-of-pocket expenditures. Beginning in 2006, the adjusted community rate (ACR) process for determining plan payments is replaced by a competitive bidding process. (Historical reference points to this item include the Medicare+Choice provision of 1997 and the HMO provision of 1982, both of which are displayed in this section.)

2007. Group health plans are required to provide information identifying situations in which the plan is, or has been, primary to Medicare, effective January 2009. Effective June 2009, liability insurance, no-fault insurance, and workers' compensation plans must submit specific information to enable appropriate determinations concerning coordination of benefits and any applicable recovery claims.

Under Part D

2003. Under temporary Medicare-endorsed prescription drug discount card program, for eligible beneficiaries voluntarily enrolling and paying up to \$30 annually, discounts on certain prescription drugs, as specified by card sponsors. Under Transitional Assistance provision, eligible beneficiaries whose incomes do not exceed 135 percent of the federal poverty level and do not have third-party prescription drug coverage are eligible for (1) financial assistance of up to \$600 per year for purchasing prescription drugs and (2) a subsidized enrollment fee under the temporary Medicare-endorsed prescription drug discount card program. Enrollment begins in May 2004, access to discounts begins in June 2004, and program phases out as drug benefit becomes available in 2006 (see next entry).

Beginning January 1, 2006, upon voluntary enrollment in either a stand-alone PDP or an integrated Medicare Advantage plan that offers Part D coverage in its benefit, subsidized prescription drug coverage. Most FDA-approved drugs and biologicals are covered. However, plans may set up formularies for their drug coverage, subject to certain statutory standards. (Drugs currently covered in Parts A and B remain covered there.) Part D coverage can consist of either standard coverage or an alternative design that provides the same actuarial value. (For an additional premium, plans may also offer supplemental coverage exceeding the value of basic coverage.) Standard Part D coverage is defined for 2006 as having a \$250 deductible, with 25 percent coinsurance (or

other actuarially equivalent amounts) for drug costs above the deductible and below the initial coverage limit of \$2,250. The beneficiary is then responsible for all costs until the \$3,600 out-of-pocket limit (which is equivalent to total drug costs of \$5,100) is reached. For higher costs, there is catastrophic coverage; it requires enrollees to pay the greater of 5 percent coinsurance or a small copay (\$2 for generic or preferred multisource brand and \$5 for other drugs). After 2006, these benefit parameters are indexed to the growth in per capita Part D spending (see Table 2.C1). In determining out-of-pocket costs, only those amounts actually paid by the enrollee or another individual (and not reimbursed through insurance) are counted; the exception is cost-sharing assistance from Medicare's low-income subsidies (certain beneficiaries with low incomes and modest assets will be eligible for certain subsidies that eliminate or reduce their Part D premiums, cost-sharing, or both) and from State Pharmacy Assistance Programs. A beneficiary premium, representing 25.5 percent of the cost of basic coverage on average, is required (except for certain low-income beneficiaries, as previously mentioned, who may pay a reduced or no premium). For PDPs and the drug portion of Medicare Advantage plans, the premium will be determined by a bid process; each plan's premium will be 25.5 percent of the national weighted average plus or minus the difference between the plan's bid and the average. To help them gain experience with the Medicare population, plans will be protected by a system of risk corridors, which allow Part D to assist with unexpected costs and to share in unexpected savings; after 2007, the risk corridors became less protective. To encourage employer and union plans to continue prescription drug coverage to Medicare retirees, subsidies to these plans are authorized; the plan must meet or exceed the value of standard Part D coverage, and the subsidy pays 28 percent of the allowable costs associated with enrollee prescription drug costs between a specified cost threshold (\$250 in 2006, indexed thereafter) and a specified cost limit (\$5,000 in 2006, indexed thereafter).

2008. Part D plans are required to include two classes of drugs in their formularies: (1) benzodiazepines and (2) for the treatment of epilepsy, cancer, or chronic mental disorder, barbiturates. Effective January 1, 2013.

2010. Beneficiaries who enter the coverage gap in 2010 receive a \$250 rebate and, starting in 2011, beneficiaries receive a 50-percent discount on covered brand-name prescription drugs. (The dollar value of this discount counts toward out-of-pocket spending, even though the beneficiary does not incur the cost.) Additionally, reductions in beneficiary cost sharing for

both brand-name and generic drugs during the coverage gap are to be phased in beginning in 2011, such that by 2020, the coverage gap will be closed, and beneficiaries will be responsible for 25 percent of their prescription drug costs.

Retiree drug subsidies paid to employers and unions that provide continued prescription drug coverage to Medicare retirees (and meet specific criteria in doing so) are taxable beginning in 2013.

Medicare Financing

Hospital Insurance Taxes

See Table 2.A3.

2010. Beginning in 2013, an additional Part A payroll tax of 0.9 percent is collected on earned income exceeding \$200,000 (for those filing income tax singly) and \$250,000 (for those filing jointly). The earnings thresholds are not indexed.

Appropriations from General Revenues

1965. For HI costs attributable to transitionally insured beneficiaries.

For HI costs attributable to noncontributory wage credits granted for military service prior to 1957 (see Table 2.A2).

For the Part B program, an amount equal to participant premiums.

1972. For cost of Part B not met by enrollee premiums.

1982. For HI costs attributable to beneficiaries having transitional entitlement based on Medicare-qualified federal employment.

1983. For HI taxes on noncontributory wage credits granted for military service (a) from the inception of HI program through 1983 and (b) on a current basis, annually, beginning in 1984 (see Table 2.A2).

2002. Eliminated for HI taxes on noncontributory wage credits granted for military service on a current basis, for all years after calendar year 2001 (see Table 2.A2).

2003. For Part D costs not met by enrollee premiums or otherwise, beginning in January 2006. (That is, transfers from general revenues [plus smaller income sources, particularly the payments from states described below] will pay for (1) the 74.5 percent subsidy to PDPs and the prescription drug portion of Medicare Advantage plans [which remains after enrollee premiums of 25.5 percent, on average], in the form of a direct subsidy and reinsurance, and (2) for other Part D costs, such as low-income subsi-

dies and subsidies to employers who provide qualifying drug coverage to their Medicare-eligible retirees.)

Beginning January 2007, for Part B beneficiaries meeting certain income thresholds and thus paying income-related adjustment amounts in addition to their standard Part B premiums (see “Medicare Financing, Participant Premiums, 2003”), the per capita general revenue appropriations to Part B (see 1965 and 1972) are supposed to be reduced accordingly.

2010. Beginning January 2011, for Part D beneficiaries meeting certain income thresholds and thus paying income-related adjustment amounts in addition to their Part D premiums (see “Medicare Financing, Participant Premiums, 2010”), the per capita general revenue appropriations to Part D (see 2003) are supposed to be reduced accordingly.

Participant Premiums

See Table 2.C1.

1965. Part B enrollee premium rate (originally \$3 per month) to be established annually such that it will pay one-half of program costs.

1972. Part B enrollee premium rate increase limited to rate of increase in OASDI cash benefits.

HI premium (originally \$33 per month) to be established annually. Only individuals not otherwise entitled to HI but desiring voluntary participation need to pay the HI premium.

1983. Part B enrollee premiums for July 1983 to December 31, 1983, frozen at premium level of June 30, 1983. Premiums for January 1, 1984, to December 31, 1985, set to cover 25 percent of aged program costs.

1984. Part B enrollee premiums for January 1, 1986, to December 31, 1987, will be set to cover 25 percent of aged program costs. Increases in the Part B premium may not exceed the dollar amount of the Social Security cost-of-living adjustment.

For calculating the amount of Part B premium surcharge for individuals aged 65–70 not previously enrolled in Part B, the number of years an individual did not enroll because of coverage by employer group health insurance will not be taken into account.

1985. Extends through calendar year 1988 the requirement that Part B premiums be set to cover 25 percent of aged program costs and that increases in the Part B premium may not exceed the dollar amount of the Social Security cost-of-living adjustment.

Premium-paying individuals who do not purchase Part A coverage within a specific time after becoming eligible because of age are subject to a 10 percent penalty for each 12 months they are late in enrolling. There is a cutoff on the length of time these individuals will have to pay an enrollment penalty. The 10 percent premium penalty would be limited to twice the number of years enrollment was delayed. Therefore, if enrollment was delayed 1 year, the penalty would be assessed for 2 years. Individuals in this category and already enrolled will have the length of time the higher premium was paid credited to them.

1987. Extends through calendar year 1989 the provisions requiring that the Part B premium be set to cover 25 percent of aged program costs, prohibiting any increase in the premium if there is no Social Security cost-of-living adjustment, and continuing to hold beneficiaries harmless from Social Security check reductions as a result of a premium increase.

1988. Increases in the Part B premium may not exceed the dollar amount of the Social Security cost-of-living adjustments for 1989 and beyond.

1989. Extends through calendar year 1990 the requirement that Part B premiums be set to cover 25 percent of aged program costs.

1990. The Part B premium is set at \$29.90 in 1991, \$31.80 in 1992, \$36.60 in 1993, \$41.10 in 1994, and \$46.10 in 1995.

1993. Part B enrollee premiums for January 1, 1996, to December 31, 1998, will be set to cover 25 percent of aged program costs.

1997. The Part B premium is permanently set at 25 percent of program costs.

2003. Beginning January 2007, the Part B premium is increased for beneficiaries meeting certain income thresholds. (Beneficiaries with modified adjusted gross incomes under \$80,000 will continue to pay premiums that are 25 percent of twice the actuarial rate. *Actuarial rate* is defined as one-half of the Part B expected monthly cost per enrollee. For beneficiaries with incomes greater than \$80,000 and less than or equal to \$100,000, the applicable percentage is 35 percent; for those with incomes greater than \$100,000 and less than or equal to \$150,000, the percentage is 50 percent; for incomes greater than \$150,000 and less than or equal to \$200,000, the percentage is 65 percent; and for incomes greater than \$200,000, the percentage is 80 percent. For married couples who file joint tax returns, the income thresholds are doubled. For beneficiaries who are married and lived with their spouses at any time during the taxable year but who file separate tax returns from their spouses, with incomes greater than

\$80,000 and less than or equal to \$120,000, the percentage is 65 percent; with incomes greater than \$120,000, the percentage is 80 percent. These thresholds are to be updated each calendar year by the Consumer Price Index (CPI). There is a 5-year adjustment period for this provision as well; that is, the amount of premium above 25 percent of twice the actuarial rate is phased in—at 20, 40, 60, 80, and 100 percent for 2007 to 2011 and later, respectively.)

For military retirees, their spouses (including eligible divorced spouses and widows and widowers), and dependent children who enroll(ed) in Part B during the period from 2001 to 2004, the late enrollment penalty imposed on beneficiaries who do not enroll in Part B upon becoming eligible for Medicare is waived for premium payments for January 2004 and later. (Also, a special enrollment period for these beneficiaries is to begin as soon as possible and end December 31, 2004.)

For Part D, beginning in January 2006, a beneficiary premium, representing 25.5 percent of the cost of basic coverage on average, is required (except for certain low-income beneficiaries who may pay a reduced or no premium). For PDPs and the drug portion of Medicare Advantage plans, the premium will be determined by a bid process; each plan's premium will be 25.5 percent of the national weighted average plus or minus the difference between the plan's bid and the average. A late enrollment penalty will apply for certain beneficiaries who fail to enroll at the first opportunity and who do not maintain creditable coverage elsewhere (external prescription drug coverage, such as through a retiree group health plan that meets or exceeds the actuarial value of standard Part D coverage).

2005. The phase-in of the income-related Part B premium (see 2003) is shortened from 5 years to 3 years, beginning January 1, 2007. (That is, the amount of premium above 25 percent of twice the actuarial rate is phased in at 1/3 for 2007, 2/3 for 2008, and 3/3 for 2009 and later.)

For beneficiaries who are volunteering outside the United States through a 12-month or longer program sponsored by a tax-exempt organization and who have other health insurance, the late enrollment penalties imposed on beneficiaries who do not enroll in Part B upon becoming eligible for Medicare are waived, effective January 2007, and a special enrollment period for these beneficiaries is established.

2008. The policy waiving the late enrollment penalty for Part D enrollees who meet certain low-income and limited-resources requirements is codified into statute. (The policy was in effect through 2008 and the law is effective beginning January 1, 2009.)

2010. The income thresholds used to calculate Part B income-related premiums are frozen at 2010 levels for 2011 through 2019.

Beginning in January 2011, Part D enrollees whose income exceeds certain thresholds are required to pay higher Part D premiums. The income thresholds and premium adjustments are to be set in the same manner as those under Part B (including the use of frozen thresholds in 2011–2019).

Income from Taxation of OASDI Benefits

1993. The additional income tax revenues resulting from the increase in the taxable percentage applicable to OASDI benefits (an increase from 50 percent to 85 percent, see Table 2.A31) are transferred to the HI trust fund.

Payment from States

2003. Beginning in January 2006, with the availability of drug coverage and low-income subsidies under Part D, Medicaid will no longer be primary payer for full-benefit dual eligibles, and states are required to make payments to defray a portion of the Part D drug expenditures for these beneficiaries. States pay 90 percent of the estimated costs for 2006, phasing down over a 10-year period to 75 percent for 2015 and later.

Interfund Borrowing

1981. See Table 2.A6.

1983. See Table 2.A6.

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Medicaid

The following are brief summaries of complex subjects as of November 1, 2010. They should be used only as overviews and general guides to the Medicare and Medicaid programs. The views expressed herein do not necessarily reflect the policies or legal positions of the Centers for Medicare & Medicaid Services (CMS) or the Department of Health and Human Services (HHS). These summaries do not render any legal, accounting, or other professional advice, nor are they intended to explain fully all of the provisions or exclusions of the relevant laws, regulations, and rulings of the Medicare and Medicaid programs. Original sources of authority should be researched and utilized.¹

Overview

Title XIX of the Social Security Act is a federal and state entitlement program that pays for medical assistance for certain individuals and families with low incomes and resources. This program, known as Medicaid, became law in 1965 as a cooperative venture jointly funded by the federal and state governments (including the District of Columbia and the territories) to assist states in furnishing medical assistance to eligible needy persons. Medicaid is the largest source of funding for medical and health-related services for America's poorest people.

Within broad national guidelines established by federal statutes, regulations, and policies, each state establishes its own eligibility standards; determines the type, amount, duration, and scope of services; sets the rate of payment for services; and administers its own program. Medicaid policies for eligibility, services, and payment are complex and vary considerably, even among states of similar size or geographic proximity. Thus, a person who is eligible for Medicaid in one state may not be eligible in another state, and the services provided by one state may differ considerably in amount, duration, or scope from services provided in a similar or neighboring state. In addition, state legislatures may change Medicaid eligibility, services, and/or reimbursement at any time.

Title XXI of the Social Security Act, the Children's Health Insurance Program (CHIP, known from its inception until March 2009 as the State Children's Health Insurance Program, or SCHIP), is a program initiated by the Balanced Budget Act (BBA) of 1997 (Public Law 105-33). The BBA provided \$40 billion in federal funding through fiscal year 2007 to furnish health care coverage

for low-income children—generally those in households with income below 200 percent of the federal poverty level (FPL)—who did not qualify for Medicaid and would otherwise be uninsured. Subsequent legislation, including the Children's Health Insurance Program Reauthorization Act (CHIPRA) of 2009 (Public Law 111-3) and the Patient Protection and Affordable Care Act (Public Law 111-148) as amended by the Health Care and Education Reconciliation Act of 2010 (Public Law 111-152)—collectively referred to as the Affordable Care Act—extended CHIP funding through fiscal year 2015. Under CHIP, states may elect to provide coverage to qualifying children by expanding their Medicaid programs or through a state program separate from Medicaid. A number of states have also been granted waivers to cover parents of children enrolled in CHIP.

Medicaid Eligibility

Until 2014, when the Affordable Care Act will expand Medicaid eligibility, Medicaid does not provide medical assistance for all poor persons. Under the broadest provisions of the federal statute, Medicaid does not currently provide health care services even for very poor persons unless they are in one of the groups designated below. Low income is only one test for Medicaid eligibility for those within these groups; their financial resources also are tested against threshold levels (as determined by each state within federal guidelines).

States generally have broad discretion in determining which groups their Medicaid programs will cover and the financial criteria for Medicaid eligibility. To be eligible for federal funds, however, states are required to provide Medicaid coverage for certain individuals who receive federally assisted income-maintenance payments, as well as for related groups not receiving cash payments. In addition to their Medicaid programs, most states have additional "state-only" programs to provide medical assistance for specified poor persons who do not qualify for Medicaid. Federal funds are not provided for state-only programs. The following enumerates the mandatory Medicaid "categorically needy" eligibility groups for which federal matching funds are provided:

- Limited-income families with children, as described in section 1931 of the Social Security Act, are generally eligible for Medicaid if they meet the requirements for the Aid to Families with Dependent Children (AFDC) program that were in effect in their state on July 16, 1996.
- Children under age 6 whose family income is at or below 133 percent of the FPL. (As of January 2010, the FPL has been set at \$22,050 for a family of four

1. These summaries were prepared by Barbara S. Klees, Christian J. Wolfe, and Catherine A. Curtis, Office of the Actuary, Centers for Medicare & Medicaid Services, 7500 Security Blvd., Baltimore, MD 21244. The authors wish to express their gratitude to Mary Onnis Waid, who originated these summaries and diligently prepared them for many years before her retirement.

in the continental U.S.; Alaska and Hawaii's FPLs are substantially higher.)

- Pregnant women whose family income is below 133 percent of the FPL. (Services to these women are limited to those related to pregnancy, complications of pregnancy, delivery, and postpartum care.)
- Infants born to Medicaid-eligible women, for the first year of life with certain restrictions.
- Supplemental Security Income (SSI) recipients in most states (or aged, blind, and disabled individuals in states using more restrictive Medicaid eligibility requirements that pre-date SSI).
- Recipients of adoption or foster care assistance under Title IV-E of the Social Security Act.
- Special protected groups (typically individuals who lose their cash assistance under Title IV-A or SSI because of earnings from work or from increased Social Security benefits, but who may keep Medicaid for a period of time).
- All children under age 19, in families with incomes at or below the FPL.
- Certain Medicare beneficiaries (described later).

States also have the option of providing Medicaid coverage for other "categorically related" groups. These optional groups share characteristics of the mandatory groups (that is, they fall within defined categories), but the eligibility criteria are somewhat more liberally defined. The broadest optional groups for which states can receive federal matching funds for coverage under the Medicaid program include the following:

- Infants up to age 1 and pregnant women not covered under the mandatory rules whose family income is no more than 185 percent of the FPL. (The percentage amount is set by each state.)
- Children under age 21 who meet criteria more liberal than the AFDC income and resources requirements that were in effect in their state on July 16, 1996.
- Institutionalized individuals, and individuals in home and community-based waiver programs, who are eligible under a "special income level." (The amount is set by each state—up to 300 percent of the SSI federal benefit rate.)
- Individuals who would be eligible if institutionalized, but who are receiving care under home and community-based services waivers.
- Certain aged, blind, or disabled adults who have incomes above those requiring mandatory coverage, but below the FPL.

- Aged, blind, or disabled recipients of state supplementary income payments.
- Certain working-and-disabled persons with family income less than 250 percent of the FPL who would qualify for SSI if they did not work.
- Tuberculosis-infected persons who would be financially eligible for Medicaid at the SSI income level if they were in a Medicaid-covered category. (Coverage is limited to tuberculosis-related ambulatory services and tuberculosis drugs.)
- Certain uninsured or low-income women who are screened for breast or cervical cancer through a program administered by the Centers for Disease Control and Prevention. The Breast and Cervical Cancer Prevention and Treatment Act of 2000 (Public Law 106-354) provides these women with medical assistance and follow-up diagnostic services through Medicaid.
- "Optional targeted low-income children" included in the CHIP (formerly SCHIP) program established by the BBA.
- "Medically needy" persons (described below).

The medically needy (MN) option allows states to extend Medicaid eligibility to additional persons. These persons would be eligible for Medicaid under one of the mandatory or optional groups, except that their income and/or resources are above the eligibility level set by their state. Persons may qualify immediately or may "spend down" by incurring medical expenses greater than the amount by which their income exceeds their state's MN income level.

Medicaid eligibility and benefit provisions for the medically needy do not have to be as extensive as for the categorically needy, and may be quite restrictive. Federal matching funds are available for MN programs. However, if a state elects to have an MN program, there are federal requirements that certain groups and certain services must be included; for example, children under age 19 and pregnant women who are medically needy must be covered, and prenatal and delivery care for pregnant women, as well as ambulatory care for children, must be provided. A state may elect to provide MN eligibility to certain additional groups and may elect to provide certain additional services as part of its MN program. As of 2008, 34 states plus the District of Columbia have elected to have an MN program and are providing services to at least some MN beneficiaries. All remaining states utilize the "special income level" option to extend Medicaid to the "near poor" in medical institutional settings.

The Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (Public Law 104-193)—known

as the “welfare reform” bill—made restrictive changes regarding eligibility for SSI coverage that affected the Medicaid program. For example, legal resident aliens and other qualified aliens who entered the United States on or after August 22, 1996 are ineligible for Medicaid for 5 years. States have the option of providing Medicaid coverage for most aliens entering before that date and coverage for those eligible after the 5-year ban; emergency services, however, are mandatory for both of these alien coverage groups. For aliens who lose SSI benefits because of these restrictions regarding SSI coverage, Medicaid benefits can continue only if these persons can be covered under some other eligibility status (again with the exception of emergency services, which are mandatory). Public Law 104-193 also affected a number of disabled children, who lost SSI as a result of the restrictive changes; however, their eligibility for Medicaid was reinstated by Public Law 105-33, the BBA.

In addition, welfare reform repealed the open-ended federal entitlement program known as Aid to Families with Dependent Children (AFDC) and replaced it with Temporary Assistance for Needy Families (TANF), which provides states with grants to be spent on time-limited cash assistance. TANF generally limits a family’s lifetime cash welfare benefits to a maximum of 5 years and permits states to impose a wide range of other requirements as well—in particular, those related to employment. However, the impact on Medicaid eligibility has not been significant. Under welfare reform, persons who would have been eligible for AFDC under the AFDC requirements in effect on July 16, 1996 are generally still eligible for Medicaid. Although most persons covered by TANF receive Medicaid, it is not required by law.

Medicaid coverage may begin as early as the third month prior to application—if the person would have been eligible for Medicaid had he or she applied during that time. Medicaid coverage generally stops at the end of the month in which a person no longer meets the criteria of any Medicaid eligibility group. The BBA allows states to provide 12 months of continuous Medicaid coverage (without reevaluation) for eligible children under age 19.

The Ticket to Work and Work Incentives Improvement Act of 1999 (Public Law 106-170) provides or continues Medicaid coverage to certain disabled beneficiaries who work despite their disability. Beneficiaries with higher incomes may pay a sliding scale premium based on income.

The Deficit Reduction Act (DRA) of 2005 (Public Law 109-171) refined eligibility requirements for Medicaid beneficiaries by tightening standards for citizenship and immigration documentation and by changing the rules concerning long-term care eligibility—specifically, the

look-back period for determining community spouse income and assets was lengthened from 36 months to 60 months, individuals whose homes exceed \$500,000 in value are disqualified, and the states are required to impose partial months of ineligibility.

Beginning in 2014, the Affordable Care Act will expand Medicaid eligibility to include all individuals under age 65 in families with income below 138 percent of the FPL. (Technically, the income limit is 133 percent of the FPL, but the Act also provides for a 5-percent income disregard.) In addition to the higher level of allowable income, the new legislation expands eligibility to people under age 65 who have no other qualifying factors that would have made them eligible for Medicaid under prior law, such as being under age 18, disabled, pregnant, or parents of eligible children. Because individuals are not required to be parents of eligible children under the new law, nondisabled nonaged adults comprise the category expected to have the greatest increase in Medicaid enrollment. The Affordable Care Act also broadens availability of long-term care services and supports, starting, in some instances, as early as 2010.

Scope of Medicaid Services

Title XIX of the Social Security Act allows considerable flexibility within the states’ Medicaid plans. However, some federal requirements are mandatory if federal matching funds are to be received. A state’s Medicaid program must offer medical assistance for certain basic services to most categorically needy populations. These services generally include:

- Inpatient hospital services;
- Outpatient hospital services;
- Pregnancy-related services, including prenatal care and 60 days postpartum pregnancy-related services;
- Vaccines for children;
- Physician services;
- Nursing facility services for persons aged 21 or older;
- Family planning services and supplies;
- Rural health clinic services;
- Home health care for persons eligible for skilled nursing services;
- Laboratory and x-ray services;
- Pediatric and family nurse practitioner services;
- Nurse-midwife services;
- Federally qualified health center (FQHC) services, and ambulatory services of an FQHC that would be available in other settings; and

- Early and periodic screening, diagnostic, and treatment (EPSDT) services for children under age 21.

States may also receive federal matching funds to provide certain optional services. Some of the most common currently approved optional Medicaid services are:

- Diagnostic services;
- Clinic services;
- Intermediate care facilities for the intellectually disabled (ICFs/ID, formerly known as ICFs for the mentally retarded or ICFs/MR);
- Prescribed drugs and prosthetic devices;
- Optometrist services and eyeglasses;
- Nursing facility services for children under age 21;
- Transportation services;
- Rehabilitation and physical therapy services;
- Hospice care;
- Home and community-based care to certain persons with chronic impairments; and
- Targeted case management services.

The BBA included a state option known as Programs of All-inclusive Care for the Elderly (PACE). PACE provides an alternative to institutional care for persons aged 55 and older who require a nursing-facility level of care. The PACE team offers and manages all health, medical, and social services and mobilizes other services as needed to provide preventive, rehabilitative, curative, and supportive care. This care, provided in day health centers, homes, hospitals, and nursing homes, helps the person maintain independence, dignity, and quality of life. PACE functions within the Medicare program as well. Regardless of source of payment, PACE providers receive payment only through the PACE agreement and must make available all items and services covered under both Titles XVIII and XIX, without amount, duration, or scope limitations and without application of any deductibles, copayments, or other cost sharing. The individuals enrolled in PACE receive benefits solely through the PACE program.

Amount and Duration of Medicaid Services

Within broad federal guidelines and certain limitations, states determine the amount and duration of services offered under their Medicaid programs. States may limit, for example, the number of days of hospital care or the number of physician visits covered. Two restrictions apply: (1) limits must result in a sufficient level of services to reasonably achieve the purpose of the benefits, and

(2) limits on benefits may not discriminate among beneficiaries based on medical diagnosis or condition.

In general, states are required to provide comparable amounts, duration, and scope of services to all categorically needy and categorically related eligible persons. There are two important exceptions: (1) medically necessary health care services that are identified under the EPSDT program for eligible children, and that are within the scope of mandatory or optional services under federal law, must be covered even if those services are not included as part of the covered services in that state's plan, and (2) states may request waivers to pay for otherwise uncovered home and community-based services for Medicaid-eligible persons who might otherwise be institutionalized. As long as the services are cost effective, states have few limitations on the services that may be covered under these waivers (except that states may not provide room and board for the beneficiaries, other than as a part of respite care). With certain exceptions, a state's Medicaid program must allow beneficiaries to have some informed choices among participating providers of health care and to receive quality care that is appropriate and timely.

Payment for Medicaid Services

Medicaid operates as a vendor payment program. States may pay health care providers directly on a fee-for-service basis, or states may pay for Medicaid services through various prepayment arrangements, such as health maintenance organizations (HMOs). Within federally imposed upper limits and specific restrictions, each state for the most part has broad discretion in determining the payment methodology and payment rate for services. Generally, payment rates must be sufficient to enlist enough providers so that covered services are available at least to the extent that comparable care and services are available to the general population within that geographic area. Providers participating in Medicaid must accept Medicaid payment rates as payment in full. States must make additional payments to qualified hospitals that provide inpatient services to a disproportionate number of Medicaid beneficiaries and/or to other low-income or uninsured persons under what is known as the "disproportionate share hospital" (DSH) adjustment. From 1988 to 1991, excessive and inappropriate use of the DSH adjustment resulted in rapidly increasing federal expenditures for Medicaid. Legislation that was passed in 1991 and 1993, and again in the BBA of 1997, capped the federal share of payments to DSH hospitals. However, the Medicare, Medicaid, and SCHIP Benefits Improvement and Protection Act (BIPA) of 2000 (Public Law 106-554) increased DSH allotments for 2001 and 2002 and made other changes to DSH provisions that resulted in increased costs to the Medicaid program.

States may impose nominal deductibles, coinsurance, or copayments on some Medicaid beneficiaries for certain services. The following Medicaid beneficiaries, however, must be excluded from cost sharing: pregnant women, children under age 18, and hospital or nursing home patients who are expected to contribute most of their income to institutional care. In addition, all Medicaid beneficiaries must be exempt from copayments for emergency services and family planning services. Under the DRA, new cost sharing and benefit rules provided states the option of imposing new premiums and increased cost sharing on all Medicaid beneficiaries except for those mentioned above and for terminally ill patients in hospice care. The DRA also established special rules for cost sharing for prescription drugs and for nonemergency services furnished in emergency rooms.

The federal government pays a share of the medical assistance expenditures under each state's Medicaid program. That share, known as the Federal Medical Assistance Percentage (FMAP), is determined annually by a formula that compares the state's average per capita income level with the national income average. States with a higher per capita income level are reimbursed a smaller share of their costs. By law, the FMAP cannot be lower than 50 percent or higher than 83 percent. In fiscal year 2010, the FMAPs varied from 50 percent in 16 states and the territories to 75.7 percent in Mississippi and averaged 59.2 percent overall. The BBA permanently raised the FMAP for the District of Columbia from 50 percent to 70 percent. For children covered through the CHIP program, the federal government pays states a higher share, or "enhanced" FMAP, which averaged 71.5 percent in fiscal year 2010.

The American Recovery and Reinvestment Act (ARRA) of 2009 (Public Law 111-5) provided states with an increase in their Medicaid FMAPs of up to 14 percentage points, depending on state unemployment rates, for the first quarter of fiscal year 2009 through the first quarter of fiscal year 2011. Section 201 of Public Law 111-226 (referred to as the Education, Jobs, and Medicaid Assistance Act of 2010) extended these increases for the second and third quarters of fiscal year 2011, but at lower levels than those under ARRA.

The federal government also reimburses states for 100 percent of the cost of services provided through facilities of the Indian Health Service, for 100 percent of the cost of the Qualifying Individuals (QI) program (described later), and for 90 percent of the cost of family planning services, and shares in each state's expenditures for the administration of the Medicaid program. Most administrative costs are matched at 50 percent, although higher percentages are paid for certain activities and functions, such as development of mechanized claims processing systems.

Except for the CHIP program, the QI program, DSH payments, and payments to territories, federal payments to states for medical assistance have no set limit (cap). Rather, the federal government matches (at FMAP rates) state expenditures for the mandatory services, as well as for the optional services that the individual state decides to cover for eligible beneficiaries, and matches (at the appropriate administrative rate) all necessary and proper administrative costs.

Summary and Trends

Medicaid was initially formulated as a medical care extension of federally funded programs providing cash income assistance for the poor, with an emphasis on dependent children and their mothers, the disabled, and the elderly. Over the years, however, Medicaid eligibility has been incrementally expanded beyond its original ties with eligibility for cash programs. Legislation in the late 1980s extended Medicaid coverage to a larger number of low-income pregnant women and poor children and to some Medicare beneficiaries who are not eligible for any cash assistance program. Legislative changes also focused on increased access, better quality of care, specific benefits, enhanced outreach programs, and fewer limits on services.

In most years since its inception, Medicaid has had very rapid growth in expenditures. This rapid growth has been due primarily to the following factors:

- The increase in size of the Medicaid-covered populations as a result of federal mandates, population growth, and economic recessions;
- The expanded coverage and utilization of services;
- The DSH payment program, coupled with its inappropriate use to increase federal payments to states;
- The increase in the number of very old and disabled persons requiring extensive acute and/or long-term health care and various related services;
- The results of technological advances to keep a greater number of very low birth-weight babies and other critically ill or severely injured persons alive and in need of continued extensive and very costly care;
- The increase in drug costs and the availability of new expensive drugs; and
- The increase in payment rates to providers of health care services, when compared with general inflation.

As with all health insurance programs, most Medicaid beneficiaries incur relatively small average expenditures per person each year, and a relatively small proportion incurs very large costs. Moreover, the average cost varies substantially by type of beneficiary. National

data for 2007, for example, indicate that Medicaid payments for services for 29.9 million children, who constituted 53 percent of all Medicaid beneficiaries, averaged \$1,878 per child. Similarly, for 13.5 million adults, who represented 24 percent of beneficiaries, payments averaged \$2,650 per person. However, other groups had much larger per-person expenditures. Medicaid payments for services for 4.4 million aged, who constituted 8 percent of all Medicaid beneficiaries, averaged \$13,612 per person; for 9.1 million disabled, who represented 16 percent of beneficiaries, payments averaged \$13,663 per person. When expenditures for these high- and lower-cost beneficiaries are combined, the 2007 payments to health care vendors for 56.8 million Medicaid beneficiaries averaged \$4,862 per person.

Long-term care is an important provision of Medicaid that will be increasingly utilized as our nation's population ages. The Medicaid program paid for nearly 41 percent of the total cost of nursing facility care in 2008. National data for 2007 show that Medicaid payments for nursing facility services (excluding ICFs/ID) totaled \$46.5 billion for more than 1.6 million beneficiaries of these services—an average expenditure of \$28,335 per nursing home beneficiary. The national data also show that Medicaid payments for home health services totaled \$6.3 billion for 1.2 million beneficiaries—an average expenditure of \$5,344 per home health care beneficiary. With the percentage of our population who are elderly or disabled increasing faster than that of the younger groups, the need for long-term care is expected to increase.

Another significant development in Medicaid is the growth in managed care as an alternative service delivery concept different from the traditional fee-for-service system. Under managed care systems, HMOs, prepaid health plans (PHPs), or comparable entities agree to provide a specific set of services to Medicaid enrollees, usually in return for a predetermined periodic payment per enrollee. Managed care programs seek to enhance access to quality care in a cost-effective manner. Waivers may provide the states with greater flexibility in the design and implementation of their Medicaid managed care programs. Waiver authority under sections 1915(b) and 1115 of the Social Security Act is an important part of the Medicaid program. Section 1915(b) waivers allow states to develop innovative health care delivery or reimbursement systems. Section 1115 waivers allow experimental statewide health care reform demonstrations to cover uninsured populations and to test new delivery systems without increasing costs. Finally, the BBA provided states a new option to use managed care without a waiver. The number of Medicaid beneficiaries enrolled in some form of managed care program is growing rapidly, from 48 percent of enrollees in 1997 to 71.7 percent in 2009.

In fiscal year 2009, total expenditures for the Medicaid program (federal and state) were \$384.3 billion, including direct payment to providers of \$248.9 billion, payments for various premiums (for HMOs, Medicare, etc.) of \$94.4 billion, payments to disproportionate share hospitals of \$16.3 billion, administrative costs of \$21.4 billion, and \$3.4 billion for the Vaccines for Children Program. With no changes to the Medicaid program, spending is projected to reach \$627.5 billion by fiscal year 2015. This projection includes the impact of the Affordable Care Act.

Expenditures under the CHIP program in fiscal year 2009 were \$10.7 billion. CHIP is currently funded only through fiscal year 2015.

The Medicaid-Medicare Relationship

Medicare beneficiaries who have low incomes and limited resources may also receive help from the Medicaid program. For such persons who are eligible for full Medicaid coverage, the Medicare health care coverage is supplemented by services that are available under their state's Medicaid program, according to eligibility category. These additional services may include, for example, nursing facility care beyond the 100-day limit covered by Medicare, eyeglasses, and hearing aids. For persons enrolled in both programs, any services that are covered by Medicare are paid for by the Medicare program before any payments are made by the Medicaid program, since Medicaid is always the "payer of last resort."

Certain other Medicare beneficiaries may receive help with Medicare premium and cost-sharing payments through their state Medicaid program. Qualified Medicare Beneficiaries (QMBs) and Specified Low-Income Medicare Beneficiaries (SLMBs) are the best-known categories and the largest in numbers. QMBs are those Medicare beneficiaries who have financial resources at or below twice the standard allowed under the SSI program and incomes at or below 100 percent of the FPL. For QMBs, Medicaid pays the Hospital Insurance (HI, or Part A) and Supplementary Medical Insurance (SMI) Part B premiums and the Medicare coinsurance and deductibles, subject to limits that states may impose on payment rates. SLMBs are Medicare beneficiaries with resources like the QMBs but with incomes that are higher, though still less than 120 percent of the FPL. For SLMBs, the Medicaid program pays only the Part B premiums. A third category of Medicare beneficiaries who may receive help consists of disabled-and-working individuals. According to Medicare law, disabled-and-working individuals who previously qualified for Medicare because of disability, but who lost entitlement because of their return to work (despite the disability), are allowed to purchase Medicare Part A and Part B coverage. If these

persons have incomes below 200 percent of the FPL but do not meet any other Medicaid assistance category, they may qualify to have Medicaid pay their Part A premiums as Qualified Disabled and Working Individuals (QDWIs).

For Medicare beneficiaries with incomes above 120 percent and less than 135 percent of the FPL, states receive a capped allotment of federal funds for payment of Medicare Part B premiums. These beneficiaries are known as Qualifying Individuals (QIs). Unlike the QMBs and SLMBs, who may be eligible for other Medicaid benefits in addition to their QMB/SLMB benefits, the QIs cannot be otherwise eligible for medical assistance under a state plan. The QI benefit is 100 percent federally funded, up to the state's allotment. The QI program was established by the BBA for fiscal years 1998 through 2002 and has been extended numerous times. The most recent extension continues the program through December 2011.

The Centers for Medicare & Medicaid Services (CMS) estimates that, in 2009, Medicaid provided some level of supplemental health coverage for 8.5 million Medicare beneficiaries.

In January 2006, a new Medicare prescription drug benefit began that provides drug coverage for Medicare beneficiaries, including those who also receive coverage from Medicaid. In addition, under this benefit, individuals eligible for both Medicare and Medicaid receive a low-income subsidy for the Medicare drug plan premium and assistance with cost sharing for prescriptions. Medicaid no longer provides drug benefits for Medicare beneficiaries.

Since the Medicare drug benefit and low-income subsidy replace a portion of state Medicaid expenditures for drugs, states will see a reduction in Medicaid expenditures. To offset this reduction, the Medicare Prescription Drug, Improvement, and Modernization Act (MMA) of 2003 (Public Law 108-173) requires each state to make a monthly payment to Medicare representing a percentage of the projected reduction. For 2006, this payment was 90 percent of the projected 2006 reduction in state spending. The percentage has decreased by 1 2/3 percent per year since 2006 and will continue decreasing to 75 percent for 2015 and beyond.

Note: Medicaid data are based on the projections of the Mid-Session Review of the President's Fiscal Year 2010 Budget and are consistent with data received from the states through the Medicaid Statistical Information System (MSIS) and forms CMS-37 and CMS-64.

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Unemployment Insurance

Through federal and state cooperation, unemployment insurance programs are designed to provide benefits to regularly employed members of the labor force who become involuntarily unemployed and who are able and willing to accept suitable employment. Workers in all 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands are covered under unemployment insurance programs.

To induce states to enact unemployment insurance laws, the Social Security Act of 1935 provided a tax offset incentive. A uniform national tax was imposed on payrolls of industrial and commercial employers who employed eight or more workers in 20 or more weeks in a calendar year. Employers who paid taxes to a state with an approved unemployment insurance law could credit (offset) up to 90 percent of the state tax against the federal tax. This ensured that employers in states without an unemployment insurance law would not have an advantage competing with similar businesses in states with such a law because they would still be subject to the federal payroll tax, and their employees would not be eligible for benefits.

In addition, the Social Security Act authorized grants to states to meet the costs of administering the state systems. By July 1937, all 48 states, the then territories of Alaska and Hawaii, and the District of Columbia had passed unemployment insurance laws. Later, Puerto Rico adopted its own program, which was incorporated in 1961 into the federal-state system. A similar program for workers in the U.S. Virgin Islands was added in 1978.

If employers are to receive an offset against federal taxes and if states are to receive federal grants for administration, federal law requires state unemployment insurance programs to meet certain requirements. These requirements are intended to ensure that a state participating in the program has an unemployment insurance system that is fairly administered.

One requirement is that all contributions collected under state laws be deposited in the unemployment trust fund of the U.S. Treasury Department. The fund is invested as a whole, but each state has a separate account to which its deposits and its share of interest on investments are credited. At any time, a state may withdraw money from its account in the trust fund, but only to pay benefits. Thus, unlike the situation in the majority of states having workers' compensation and temporary disability insurance laws, unemployment insurance benefits are paid exclusively through a public fund. Private plans cannot be substituted for the state plan.

Aside from federal standards, each state has major responsibility for the content and development of its unemployment insurance law. The state itself decides the amount and duration of benefits (except for certain federal requirements concerning federal-state Extended Benefits); the contribution rates (with limitations); and, in general, the eligibility requirements and disqualification provisions. The states also directly administer the programs collecting contributions, maintaining wage records (where applicable), taking claims, determining eligibility, and paying benefits to unemployed workers.

Coverage

Originally, coverage under the Federal Unemployment Tax Act (FUTA) had been limited to employment related primarily to industrial and commercial workers in private industry. However, several laws, including the Employment Security Amendments of 1970 and the Unemployment Compensation Amendments of 1976, added substantially to the number and types of workers protected under the state programs.

Private employers in industry and commerce are subject to the law if they have one or more individuals employed on 1 day in each of 20 weeks during the current or preceding year or if they paid wages of \$1,500 or more during any calendar quarter in the current or preceding year.

Agricultural workers are covered on farms with a quarterly payroll of at least \$20,000 or employing 10 or more employees in 20 weeks of the year. Domestic employees in private households are subject to FUTA if their employer pays wages of \$1,000 or more in a calendar quarter. Excluded from coverage are workers employed by their families and the self-employed.

Before 1976, employment in state and local governments and nonprofit organizations was exempt from FUTA. However, as a result of federal legislation enacted in 1976, most employment in these groups must now be covered by state law as a condition of securing federal approval of the state law. Under this form of coverage, local government and nonprofit employers have the option of making contributions or of reimbursing the state for actual benefit expenditures. Elected officials, legislators, members of the judiciary, and the state National Guard are still excluded, as are employees of nonprofit organizations that employ fewer than four workers in 20 weeks in the current or preceding calendar year. Many states have extended coverage beyond that provided by federal legislation.

Through special federal legislation, federal civilian employees and ex-servicemembers of the armed forces were brought under the unemployment insurance system. Benefits for those persons are financed through federal funds but are administered by the states and paid in accordance with the provisions of the state laws. A separate unemployment insurance law enacted by Congress covers railroad workers.

Amendments to FUTA made in 2000 added Indian tribes to the set of entities for whom coverage is required, although they are not liable for FUTA taxes. As a result, workers performing services for tribes are now potentially eligible to receive unemployment insurance benefits. Coverage is required when service is performed for any Indian tribe, band, nation, or other organized group community that is recognized as eligible for federal assistance because of their status as Indians. The same permissible exclusion from coverage that is applicable to other governmental entities also applies to services performed for Indian tribes. If an Indian tribe fails to make payments to states as required, the tribe loses its FUTA exemption and may lose coverage.

Eligibility for Benefits

Unemployment benefits are available as a matter of right (without a means test) to unemployed workers who have demonstrated their attachment to the labor force by a specified amount of recent work or earnings in covered employment. All federal civilian employees, ex-servicemembers, and workers whose employers contribute to or make payments in lieu of contributions to state unemployment funds are eligible if they are involuntarily unemployed, able to work, available for work, and actively seeking work. Workers must also meet any other eligibility and qualifying requirements of the state law and be free from disqualifications. Workers who meet these eligibility conditions may still be denied benefits if they are found to have voluntarily quit their jobs without good cause or were discharged for misconduct.

Work Requirements

A worker's monetary benefit rights are based on his or her employment in covered work over a prior reference period called the *base period*, and these benefit rights remain fixed for a *benefit year*. In most states, the base period is the first 4 quarters of the last 5 completed calendar quarters preceding the claim for unemployment benefits. Under certain circumstances, many states now also allow an alternative base period, which is generally the most recent 4 completed calendar quarters.

Benefits

Under all state laws, the weekly benefit amount—that is, the amount payable for a week of total unemployment—varies with the worker's past wages within certain minimum and maximum limits. In most states, the formula is designed to compensate for a fraction of the usual weekly wage. Some states replace approximately 50 percent, subject to specified dollar maximums.

A considerable majority of state laws use a formula that computes weekly benefits as a fraction of wages in one or more quarters of the base period. Most commonly, the fraction is taken of wages in the quarter during which wages were highest, because this quarter most nearly reflects full-time work. In most of these states, the same fraction is used at all benefit levels. The other state laws use a weighted schedule that gives a greater proportion of the high-quarter wages to lower-paid workers than to those earning more.

Each state establishes a ceiling on the weekly benefit amount, and no worker may receive an amount higher than the ceiling. The maximum may be either a fixed dollar amount or a flexible amount. Under the latter arrangement, which has been adopted in 36 jurisdictions, the maximum is adjusted automatically in accordance with the weekly wages of covered employees.

Fifteen states provide additional allowances for certain dependents. They all include children under the ages of 16, 18, or 19 (and, generally, older if incapacitated); nine states include a nonworking spouse; and three states consider other dependent relatives. The amount allowed per dependent varies considerably by state but generally is \$30 or less per week, and, in the majority of states, the amount is the same for each dependent.

All but 12 states require a waiting period of 1 week of total unemployment before benefits can begin. Five states have provisions making the waiting period compensable after a specified period.

Except for two jurisdictions, states provide a statutory maximum duration of 26 weeks of benefits in a benefit year. However, many jurisdictions vary the duration of benefits through various formulas.

Extended Benefits

In 1970, a permanent federal-state program of Extended Benefits was established for workers who exhaust their entitlement to regular state benefits during periods of high unemployment. The program is financed equally from federal and state funds. Employment conditions in an individual state trigger Extended Benefits. This hap-

pens when the unemployment rate among insured workers in a state averages 5 percent or more over a 13-week period and is at least 20 percent higher than the rate for the same period in the 2 preceding years. If the insured unemployment rate reaches 6 percent, a state may, by state law, disregard the 20 percent requirement in initiating Extended Benefits. Once triggered, Extended Benefit provisions remain in effect for at least 13 weeks. When a state's benefit period ends, Extended Benefits to individual workers also end, even if they have received less than their potential entitlement and are still unemployed. Further, once a state's benefit period ends, another statewide period cannot begin for at least 13 weeks.

State law determines most eligibility conditions for Extended Benefits and the weekly benefit payable. However, under federal law a claimant must have had 20 weeks in full-time employment (or the equivalent in insured wages) and must meet special work requirements. A worker who has exhausted his or her regular benefits is eligible for a 50 percent increase in duration of benefits for a maximum of 13 weeks of Extended Benefits. There is, however, an overall maximum of 39 weeks of regular and Extended Benefits. Extended Benefits are payable at the same rate as the weekly amount under the regular state program.

Before the 1992 legislation, the Extended Benefits program was based on the insured unemployment rate (IUR)—the number of unemployed workers receiving benefits in a state as a percentage of the number of persons in employment that is covered by unemployment insurance in that state. By definition, the IUR does not include workers who have exhausted their benefits but are still unemployed.

The 1992 legislation (Public Law 102-318) provided states with the option of adopting an additional formula for triggering the permanent Extended Benefits program. Effective March 1993, states had the option of amending their laws to use alternative total unemployment rate triggers, in addition to the current insured unemployment rate triggers. Under this option, Extended Benefits would be paid when (1) the state's seasonally adjusted total unemployment rate for the most recent 3 months is at least 6.5 percent and (2) that rate is at least 110 percent of the state average total unemployment rate in the corresponding 3-month period in either of the 2 preceding years.

States triggering on to the Extended Benefits program under other triggers would provide the regular 26 weeks of unemployment benefits in addition to 13 weeks of Extended Benefits (which is the same number of weeks of benefits provided previously). In addition, states that have chosen the total unemployment rate option will also amend their state laws to add an additional 7 weeks of Extended Benefits (for a total of 20 weeks) when the total unemployment rate is at least 8 percent and is 110 percent of the state's total unemployment rate for the same 3 months in either of the 2 preceding years. As of December 31, 2009, Extended Benefits were not payable in 14 states.

In addition to the permanent Extended Benefits program, Congress from time to time enacts temporary extensions of unemployment compensation benefits. The most recent example is Emergency Unemployment Compensation (EUC08). The EUC08 program was created on June 30, 2008, by the Supplemental Appropriations Act of 2008 (Public Law 110-252). It made up to 13 additional weeks of federally funded unemployment benefits available to unemployed individuals nationwide who had already collected all regular state benefits for which they were eligible and who met other eligibility requirements.

On November 21, 2008, the Unemployment Compensation Extension Act of 2008 (Public Law 110-449) expanded EUC08 to up to 20 weeks in every state and up to 13 additional weeks for individuals in "high unemployment" states. On November 6, 2009, the Worker, Homeownership, and Business Assistance Act of 2009 (Public Law 111-92) expanded EUC08 to up to 34 weeks in every state and up to 19 additional weeks for individuals in "high unemployment" states.

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Workers' Compensation

Workers' compensation was the first form of social insurance to develop widely in the United States. It is designed to provide cash benefits and medical care when employees suffer work-related injuries or illnesses and survivor benefits to the dependents of workers whose deaths result from a work-related incident. In exchange for receiving benefits, workers who receive workers' compensation are generally not allowed to bring a tort suit against their employers for damages of any kind.

The federal government was the first to establish a workers' compensation program, covering its civilian employees with an act that was passed in 1908 to provide benefits for workers engaged in hazardous work. The remaining federal workforce was covered in 1916. Nine states enacted workers' compensation laws in 1911. By 1921, all but 6 states and the District of Columbia had workers' compensation laws.

Today each of the 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands have their own program. The federal government covers its employees through its own program. It also administers the Longshore and Harbor Workers' Compensation Act, enacted in 1927, which covers longshore and harbor workers throughout the United States.

Coal miners suffering from pneumoconiosis, or "black lung" disease, are covered by the Black Lung Benefits Act of 1972, with the initial benefits enacted as part of the Coal Mine Health and Safety Act of 1969. Under this program, monthly cash benefits are payable to miners disabled by black lung disease and to their dependents or survivors. Medical benefits are also payable to the worker on the basis of a diagnosis of pneumoconiosis.

The Radiation Exposure Compensation Act of 1990 provides lump-sum compensation payments to individuals who contracted certain cancers and other serious diseases as a result of exposure to radiation released during above-ground nuclear weapons tests or during employment in underground uranium mines. The lump-sum payments are specified in law and range from \$50,000 to \$100,000.

The Energy Employees Occupational Illness Compensation Program provides lump-sum payments up to \$150,000 to civilian workers (or their survivors) who became ill as a result of exposure to radiation, beryllium, or silica in the production or testing of nuclear weapons. The program went into effect in July 2001. It also provides smaller lump-sum payments to individuals found

eligible for an award under the Radiation Exposure Compensation Act. Medical benefits are awarded for the treatment of covered conditions.

Coverage

In 2008, state and federal workers' compensation laws covered about 130.6 million employees. Covered payroll in 2008—that is, total wages paid to covered workers—was \$5.2 trillion.

Common exemptions from coverage are domestic service, agricultural employment, small employers, and casual labor. However, 39 programs have some coverage for agricultural workers, and 25 programs have some coverage for domestic workers.

Many programs exempt employees of nonprofit, charitable, or religious institutions. The coverage of state and local public employees differs widely from one state program to another.

The workers' compensation programs are compulsory for most private employment, except in Texas, where it is elective. That is, in Texas, employers may accept or reject coverage under the law. If they reject it, they lose the customary common-law defenses against suits by employees in private industry.

Two groups outside the coverage of workers' compensation laws are railroad employees engaged in interstate commerce and seamen in the U.S. Merchant Marine. These workers have health insurance and short-term and long-term cash benefit plans that cover disabilities whether or not the conditions are work-related. In addition, under federal laws these workers retain the right to bring tort suits against their employers for negligence in the case of work-related injuries or illness.

Benefits

The benefits provided under workers' compensation include periodic cash payments and medical services to the worker during the period of disablement for the disabling condition. They also include death and funeral benefits to the workers' survivors. Lump-sum settlements are permitted under most programs.

Approximately three-fourths of all workers' compensation cases involve only medical benefits. Cash wage replacement benefits are categorized according to the duration and severity of the worker's disability.

Temporary Total Disability

Most compensation cases that involve cash payments are for temporary total disability. In these cases, the worker is temporarily precluded from performing the pre-injury job or another job with the employer that the worker could have performed before the injury. When workers' lost time exceeds the waiting period (3 to 7 days, depending on the state), they receive a percentage of their weekly wages—typically two-thirds—up to a maximum weekly amount. The maximum is generally set at some percentage of the states' average weekly wage, ranging from 66 2/3 percent to 200 percent, but typically 100 percent.

Temporary Partial Disability

In some cases, workers return to work before they reach maximum medical improvement and have reduced responsibilities and a lower salary. In those cases, they receive temporary partial disability benefits.

Permanent Total Disability

If a worker has very significant impairments that are judged to be permanent after he or she reaches maximum medical improvement, the worker receives permanent total disability benefits. Very few workers' compensation cases are found to have permanent total disabilities.

Permanent Partial Disability

When the worker has impairments that, although permanent, do not completely limit the workers' ability to work, permanent partial disability benefits are paid. The system for determining benefits in these cases is complex and varies across jurisdictions. Some states provide benefits based on an impairment rating scheme. The level of impairment, often expressed as a percentage of total disability, is used to determine the benefit amount. Some states provide benefits on the basis of loss of earning capacity. They use impairment ratings with modifications based on vocational factors, such as the worker's education, job experience, and age. Other states use systems that attempt to compensate workers for actual lost wages.

Death Benefits

Generally, compensation is related to earnings and to the number of dependents eligible as the survivors of workers who die from a work-related illness or injury.

Medical Benefits

All workers' compensation acts require that medical aid be furnished without delay, to workers suffering from a work-related injury or illness, whether or not the condition entails work interruption. This care includes first-aid treatment, physician services, surgical and hospital services, nursing, medications, medical supplies, appliances, and prosthetic devices. Care is typically provided with no co-payment from the worker. A few state laws contain provisions for contributions by the covered employee for hospital and medical benefits.

Financing

Workers' compensation programs are financed almost exclusively by employers and are based on the principle that the cost of work-related accidents is a business expense. Depending on state laws, employers can purchase insurance from a private carrier or state fund, or they can self-insure. No program relies on general taxing power to finance workers' compensation. Employers in most programs are permitted to carry insurance against work accidents with commercial insurance companies or to qualify as self-insurers by giving proof of financial ability to carry their own risk. In five jurisdictions, commercial insurance is not allowed. In two of these areas, employers must insure with an exclusive state fund, and in three others, they must either insure with an exclusive state insurance fund or self-insure. In 21 jurisdictions, state funds have been established that compete with private insurance carriers. Federal employees are provided protection through a federally financed and operated system.

Program Highlights

Benefit payments under workers' compensation programs increased to \$57.6 billion in 2008, which was a 3.8 percent increase from the 2007 benefit figure of \$55.5 billion. When compared to covered wages, the benefits increased by two cents to \$0.97 per \$100 of covered wages.

In 2008, medical benefits accounted for \$29.0 billion, and wage loss compensation accounted for \$28.5 billion. The latter amount includes payments to disabled workers and the survivors of deceased workers.

The \$57.6 billion for workers' compensation benefit payments in 2008 includes \$526.2 million in benefits for the Black Lung program. This program is described separately (see tables 9.D1-9.D2).

The employers' cost of providing workers' compensation coverage generally varies according to risk, industrial classification, and experience rating. Nationally in 2008, such costs were approximately \$1.33 per \$100 of covered wages, or about \$530 for each of the 130.6 million protected employees.

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Temporary Disability Insurance

Five states, Puerto Rico, and the railroad industry have social insurance programs that partially compensate for the loss of wages caused by temporary nonoccupational disability or maternity. Those programs are known as *temporary disability insurance* (TDI) because the duration of the payments is limited.

Federal law does not provide for a federal-state insurance system for short-term disability comparable with the federal-state system of unemployment insurance. However, in 1946 Congress amended the Federal Unemployment Tax Act (FUTA) to permit states where employees make contributions under the unemployment insurance program to use some or all of these contributions to pay disability benefits (but not administrative costs). Of the nine states that could have benefited from this provision for initial funding for TDI, three—California, New Jersey, and Rhode Island—took advantage. Rhode Island had already enacted the first state law in 1942. California and the railroad industry followed in 1946, then New Jersey in 1948, and New York in 1949. A two-decade hiatus followed before Puerto Rico and Hawaii passed laws in 1968 and 1969, respectively.

The temporary disability insurance laws of the five states and Puerto Rico cover most commercial and industrial wage and salary workers in private employment if the employer has at least one worker. In no state is coverage under TDI identical with that of the unemployment insurance program. Principal occupational groups excluded are domestic workers, family workers (parent, child, or spouse of the employer), government employees, and the self-employed. State and local government employees are included in Hawaii, and the other state programs generally provide elective coverage for some or all public employees.

Agricultural workers are covered to varying degrees in California, Hawaii, New Jersey, and Puerto Rico, but they are not covered in other jurisdictions. The California law permits self-employed individuals to elect coverage on a voluntary basis. Workers employed by railroads, railroad associations, and railroad unions are covered by TDI under the national system included in the Railroad Unemployment Insurance Act.

The methods used for providing this protection vary. In Rhode Island, the coverage is provided through an exclusive, state-operated fund into which all contributions are paid and from which all benefits are disbursed. In addition, covered employers may provide supplemental benefits in any manner they choose. The railroad program is also exclusively publicly operated in conjunction with its unemployment insurance provisions.

In California, New Jersey, and Puerto Rico, coverage is provided through a state-operated fund, but employers are permitted to "contract out" of the state fund by purchasing group insurance from commercial insurance companies, by self-insuring, or by negotiating an agreement with a union or employees' association. Coverage by the state fund is automatic unless or until an employer or the employees take positive action by substituting a private plan that meets the standards prescribed in the law and is approved by the administering agency. Premiums (in lieu of contributions) are then paid directly to the private plan, and benefits are paid to the workers affected.

The laws in Hawaii and New York require employers to provide their own disability insurance plans for their workers by setting up an approved self-insurance plan, by reaching an agreement with employees or a union establishing a labor-management benefit plan, or by purchasing group insurance from a commercial carrier. In New York, the employer may also provide protection through the State Insurance Fund, which is a state-operated competitive carrier. Both Hawaii and New York operate special funds to pay benefits to workers who become disabled while unemployed or whose employers have failed to provide the required protection. In other jurisdictions, benefit payments for the disabled unemployed are made from the regular state-operated funds.

Eligibility for Benefits

To qualify for benefits, a worker must fulfill certain requirements regarding past earnings or employment and must be disabled as defined in the law. In addition, claimants may be disqualified if they received certain types of income during the period of disability.

Earnings or Employment Requirements

A claimant must have a specified amount of past employment or earnings to qualify for benefits. However, in most jurisdictions with private plans, the plans either insure workers immediately upon their employment or, in some cases, require a short probationary period of employment, usually from 1 to 3 months. Upon cessation of employment after a specified period, workers generally lose their private plan coverage and must look to a state-created fund for such protection.

Disability Requirements

The laws generally define disability as inability to perform regular or customary work because of a physical or mental condition. Stricter requirements are imposed for dis-

ability during unemployment in New Jersey and New York. All the laws pay full benefits for disability due to pregnancy.

Disqualifying Income

All the laws restrict payment of disability benefits when the claimant is also receiving workers' compensation payments. However, the statutes usually contain some exceptions to this rule (for example, if the workers' compensation is for partial disability or for previously incurred work disabilities).

The laws differ with respect to the treatment of sick leave payments. Rhode Island pays disability benefits in full even though the claimant draws wage continuation payments. New York deducts from the benefits any payment from the employer or from a fund contributed to by the employer, except for benefits paid pursuant to a collective bargaining agreement. In California, New Jersey, and Puerto Rico, benefits plus paid sick leave for any week during disability may not exceed the individual's weekly earnings before their disablement. Railroad workers are not eligible for TDI benefits while they receive sick leave pay.

In all seven TDI systems, as with unemployment insurance, weekly benefit amounts are related to a claimant's previous earnings in covered employment. In general, the benefit amount for a week is intended to replace at least one-half the weekly wage loss for a limited time. All the laws, however, specify minimum and maximum amounts payable for a week. The maximum duration of benefits varies from 26 weeks to 52 weeks. New York and Puerto Rico have a uniform duration of 26 weeks for all claimants; New Jersey and Hawaii have a variable duration of up to 26 weeks; Rhode Island has a variable duration of up to 30 weeks; and California and the railroad program have a variable duration of up to 52 weeks. Under the railroad program, duration of benefits varies from 26 weeks to 52 weeks, on the basis of the total number of years of employment in the industry. In the other jurisdictions, limited predisability "base period" wages reduce benefit duration. A noncompensable waiting period of a week or 7 consecutive days of disability (4 days for railroad workers) is generally required before the payment of benefits for subsequent weeks.

The statutory provisions described above govern the benefits payable to employees covered by the state-operated plans. In those states where private plans are permitted to participate, those provisions represent standards against which the private plan can be measured (in accordance with provisions in the state law).

Financing and Administration

Under each of the laws, except for that governing the railroad program, employees may be required to contribute to the cost of the temporary disability benefit. In five of the jurisdictions (all but California and Rhode Island), employers are also required to contribute. In general, the government does not contribute.

Five of the seven TDI programs are administered by the same agency that administers unemployment insurance. Under those programs, the unemployment insurance administrative machinery is used to collect contributions, to maintain wage records, to determine eligibility, and to pay benefits to workers under the state-operated funds. By contrast, the New York program is administered by the state Workers' Compensation Board, and the Hawaii program is administered by a separate division of the Department of Labor and Industrial Relations.

Claims in New York and Hawaii are filed with and paid by the employer, the insurance carrier, or the union health and welfare fund that is operating the private plan. The state agency limits its functions to supervising private plans, setting standards of performance, and adjudicating disputed claims arising between claimants and carriers. A similar situation applies to claimants under private plans in California, New Jersey, and Puerto Rico.

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Black Lung Benefits

The Black Lung benefit program established by the Federal Coal Mine Health and Safety Act of 1969 provides monthly benefit payments to coal miners totally disabled as a result of pneumoconiosis, to the widows of coal miners who died as a result of pneumoconiosis, and to their dependents. The Social Security Administration (SSA) was initially responsible for the payment and administration of all benefits.

The Black Lung Benefits Act of 1972 designated program operations related to claims filed through December 31, 1973 (with certain exceptions) as Part B, designated claims filed thereafter as Part C, established different financing provisions for Part C, and assigned jurisdiction for Part C to the Department of Labor (DOL).

On October 1, 1997, responsibility for maintenance and payment of Part B benefits was also transferred from SSA to DOL; SSA, however, maintained responsibility for conducting formal hearings to resolve contested issues regarding Part B claims. Data on all Part B claims are reported in this *Supplement*. Part C data are reported by DOL's Office of Workers' Compensation Programs (OWCP) in the *OWCP Annual Report to Congress*.

Legislation enacted November 2, 2002 (Public Law 107-275) permanently transferred the responsibility for all Black Lung claims (Parts B and C) to OWCP. SSA continues to handle only a small number of pending Part B appeals cases.

The basic Black Lung benefit rate is set by law at 37 1/2 percent of the monthly pay rate for federal employees in the first step of grade GS-2. The basic rate to a miner or widow may be increased according to the number of qualified dependents—50 percent of the basic benefit rate if one dependent qualifies, 75 percent for two dependents, and 100 percent for three or more dependents.

Because Black Lung payments are tied directly to federal employee salary scales, increases are automatically payable when federal salaries are increased. Reflecting a 2.9 percent adjustment, monthly benefit rates effective January 1, 2009, are:

- Miner or widow, \$616.00
- Miner or widow and 1 dependent, \$924.00
- Miner or widow and 2 dependents, \$1,078.00
- Miner or widow and 3 or more dependents (family benefit), \$1,232.00

If a miner or surviving spouse is receiving workers' compensation, unemployment compensation, or disability insurance payments under state law, the Black Lung benefit is offset by the amount being paid under these other programs.

The amendments of 1972 extended benefit payments to full orphans, parents, brothers, and sisters of deceased miners. Under earlier law, survivor payments were limited to widows and their dependent children (if the miner and spouse were both deceased, no benefits were payable to surviving children). These amendments also expanded coverage to include surface as well as underground coal miners.

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Veterans' Benefits

A variety of programs and benefits are available to servicemembers and veterans of military service: disability payments, educational assistance, health care, vocational rehabilitation, survivor and dependents benefits, life insurance, burial benefits, special loan programs, and hiring preference for certain jobs. Most of the veterans programs are administered by the Department of Veterans Affairs (VA).

Monetary Benefits

Two major cash benefit programs are available for veterans. The first program provides benefits to veterans with service-connected disabilities and, on the veteran's death, benefits are available for eligible surviving spouses, children, and dependent parents. These benefits are payable regardless of other income or resources. The second program provides benefits to needy veterans who have nonservice-connected disabilities. These benefits are means tested.

Compensation for Service-connected Disabilities

Disability compensation is a monetary benefit paid to veterans who are disabled by injury or disease incurred in or aggravated during active military service. Individuals discharged or separated from military service under dishonorable conditions are generally not eligible for compensation payments. The amount of monthly compensation depends on the degree of disability, rated as the percentage of normal function lost. Payments in 2009 range from \$123 a month for a 10 percent disability to \$2,673 a month for total disability. Veterans who have at least a 30 percent service-connected disability are entitled to an additional dependent's allowance. The amount is based on the number of dependents and degree of disability.

Pensions for Nonservice-connected Disabilities

Monthly benefits are provided to wartime veterans with limited income and resources who are totally and permanently disabled because of a condition not attributable to their military service. To qualify for these pensions, a veteran must have served in one or more of the following designated war periods: The Mexican Border Period, World War I, World War II, the Korean Conflict, the Vietnam Era, or the Gulf War. The period of service must have lasted at least 90 days, and the discharge or separation cannot have been dishonorable. Service less than 90 days is acceptable if the veteran was discharged with a service-connected disability.

Pension payments are reduced by countable income. Some medical and other expenses are allowed as deductions from countable income. Veterans aged 65 or older who meet service, net worth, and income requirements are eligible for a pension, regardless of current physical condition.

Effective December 1, 2009, maximum benefit amounts for nonservice-connected disabilities range from \$986 per month for a veteran without a dependent spouse or child to \$1,950 per month for a veteran who is in need of regular aid and attendance and who has one dependent. For each additional dependent child, the pension is raised by \$168 per month.

Benefits for Survivors

The dependency and indemnity compensation (DIC) program provides monthly benefits to the surviving spouse, children (under age 18, disabled, or students), and certain parents of servicemembers or veterans who die as the result of an injury or disease incurred while in or aggravated by active duty or training, or from a disability otherwise compensable under laws administered by the Department of Veterans Affairs.

DIC payments may also be authorized for survivors of veterans who were totally disabled by service-connected conditions at the time of death, even though their service-connected disabilities did not cause their deaths.

Eligibility for survivor benefits based on a nonservice-connected death of a veteran with a service-connected disability requires a marriage of at least 1 year's duration before the veteran's death. A surviving spouse is generally required to have lived continuously with the veteran from marriage until his or her death.

Entitlement for death benefits ends with the surviving spouse's remarriage but may be restored upon termination of the remarriage. A surviving spouse receiving DIC benefits who remarries on or after December 16, 2003, and on or after attaining age 57 is entitled to continue to receive DIC.

The monthly benefit amount payable to surviving spouses of veterans who died before January 1, 1993, depends on the last pay rate of the deceased servicemember or veteran. In 2009, for pay grades E-1 through E-6, a flat monthly rate of \$1,154 is paid to surviving spouses. Monthly benefits for grades E-7 through E-9 range between \$1,194 and \$1,314. For veterans who died after January 1, 1993, surviving spouses receive a

flat \$1,154 a month. An additional \$246 a month will be paid to supplement the basic rate if the deceased veteran had been entitled to receive 100 percent service-connected compensation for at least 8 years immediately preceding death. VA also adds a transitional benefit of \$286 to the surviving spouse's monthly DIC if there are children under age 18. The amount is based on a family unit, not individual children, and is paid up to a maximum of 2 years. The amounts payable to eligible parents are lower and depend on (1) the number of parents eligible, (2) their income, and (3) their marital status.

Pensions for Nonservice-connected Death

Pensions are paid on the basis of need to surviving spouses and dependent children (under age 18, disabled, or students) of deceased veterans of the wartime periods specified in the disability pension program. For a pension to be payable, the veteran generally must have met the same service requirements established for the nonservice-connected disability pension program, and the surviving spouse must meet the same marriage requirements as under the dependency and indemnity compensation program.

The pension amount depends on the composition of the surviving family and the physical condition of the surviving spouse. In 2009, pensions range from \$661 a month for a surviving spouse without dependent children to \$1,261 a month for a spouse who is in need of regular aid and attendance and who has a dependent child. The pension is raised by \$168 a month for each additional dependent child. Pension payments are reduced by countable income. Some medical and other expenses are allowed as deductions from countable income.

Hospitalization and Other Medical Care

The Department of Veterans Affairs (VA) provides a nationwide system of health care through a system of hospitals and community-based outpatient clinics to eligible veterans.

Enrollment and Provision of Hospitalization and Outpatient Medical Care to Veterans

To receive health care, veterans generally must be enrolled with the VA and may apply for enrollment at any time. Veterans do not have to be enrolled if they (1) have a service-connected disability of 50 percent or more, (2) want care for a disability that the military determined was incurred or aggravated in the line of duty but that the VA has not yet rated during the 12-month period following discharge, (3) want care for a service-connected disability, or (4) are receiving registry examinations.

Enrolled veterans and those not subject to enrollment are eligible to receive comprehensive medical benefits, which include basic and preventive care.

Eligibility Requirements

Basic eligibility for hospital care and outpatient medical services are based on a veteran's character of discharge from active military service. Veterans discharged prior to September 7, 1980, for other than dishonorable conditions have basic eligibility for care. However, veterans discharged after September 7, 1980, must have completed 24 consecutive months of active-duty service. Reservists who were called or ordered to active duty may also be eligible for care as veterans if they complete the full period for which they were called or ordered to active duty. The 24-month minimum service time requirement does apply to veterans who were discharged for reasons of early-out under Title 38, U.S.C. 1173, were discharged for a disability incurred or aggravated in the line of duty, were awarded VA compensation, or are in need of care for an adjudicated service-connected disability.

Care for Dependents and Survivors

The dependents and survivors of certain veterans may be eligible for medical care under the Civilian Health and Medical Program of the Department of Veterans Affairs (CHAMPVA) if not eligible for medical care under Tricare or Medicare. Tricare (formerly known as CHAMPUS) is the health program administered by the Department of Defense for dependents of active-duty personnel and military retirees and their dependents.

Beneficiaries covered by CHAMPVA may be treated at Department facilities when space is available. Usually, however, the person with CHAMPVA coverage is treated at a community hospital of his or her choice. The Department of Veterans Affairs pays for a part of the bill, and the beneficiary is responsible for any required copayment.

Nursing Home Care

A veteran seeking nursing home care must meet the established eligibility requirements for admission to a Department of Veterans Affairs nursing home. The Veterans Millennium Health Care and Benefits Act (P.L. 106-117, passed by Congress on November 30, 1999) made amendments to the original authority for nursing home placement. The new law requires that the VA:

- Provide nursing home care to any veteran in need of such care for a service-connected disability;
- Provide nursing home care to any veteran who is in need of such care and who has a service-connected disability rated at 70 percent or greater;

-
- Provide nursing home care, either directly or through contracts when clinically indicated for eligible veterans;
 - Determine the need for nursing home care based on a comprehensive interdisciplinary assessment.

Other Medical Benefits

Other Department of Veterans Affairs programs and medical benefits are available to certain veterans. Veterans do not need to be enrolled in the VA health care system to be eligible for any of the following benefits, although there may be restrictions: domiciliary care; alcohol and drug dependency treatment; prosthetic appliances; modification in certain veterans' homes when so ordered by his or her physician, subject to cost limitations; compensation and pension examinations; care as part of a VA-approved research project; readjustment counseling and treatment for Vietnam veterans; sexual trauma counseling for veterans suffering from trauma of a sexual nature during active military service; counseling; vocational rehabilitation counseling; special registry examinations; and dental care.

Educational Assistance

The post-Vietnam Veterans' Educational Assistance Program (VEAP) is a voluntary contributory matching program for persons entering service after December 31, 1976. To be eligible, the servicemember must have initially contributed to VEAP before April 1, 1987. The Montgomery GI Bill—Active Duty program provides education benefits for individuals entering military service on or after July 1, 1985, and for certain other individuals. Servicemembers entering active duty have their basic pay reduced \$100 a month for the first 12 months of their service unless they specifically elect not to participate. An educational assistance program is also available for individuals who enter the Selected Reserve on or after July 1, 1985. The post-9/11 GI Bill is a new education benefit program for servicemembers and veterans who served on active duty on or after September 11, 2001.

The Department of Veterans Affairs also pays educational assistance for dependents if a veteran is permanently and totally disabled from a service-connected cause, or dies as a result of service, or while completely disabled from service-connected causes.

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A vertical strip on the left side of the page shows a close-up of the stars and stripes of the American flag. The stars are white and five-pointed, set against a dark background. The stripes are horizontal and appear as light and dark bands.

Program Provisions and SSA Administrative Data

Old-Age, Survivors, and Disability Insurance

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Table 2.A1—Covered employment and self-employment provisions, by year enacted

Year enacted	Coverage election or waiver	Provision
1935	...	All workers in commerce and industry (except railroads) under age 65 in the continental United States, Alaska, and Hawaii and on American vessels. (Covered after 1936.)
1939	...	Age restriction eliminated.
1946	...	Railroad and Social Security earnings combined to determine eligibility for and amount of survivors benefits.
1950	...	Regularly employed farm and domestic workers. Nonfarm self-employed (except members of professional groups). Federal civilian employees not under a federal retirement system. U.S. citizens employed outside the United States by American employers. Workers in Puerto Rico and the U.S. Virgin Islands (effective January 1, 1951).
	Elective by employer	State and local government employees not under a state and local government retirement system. Termination permitted 2 years after giving notice if group has 5 years of coverage when notice is given.
	Elective by employer and employee	Employees (other than members of the clergy) of nonprofit organizations (upon election by employer, each current employee given a choice as to coverage; new employees are covered). Nonprofit organizations permitted to terminate coverage 2 years after giving notice, if the organization has 8 years of coverage when notice is given.
1951	...	Railroad workers with less than 10 years of service, for all benefits. (After October 1951, coverage retroactive to 1937.)
1954	...	Farm self-employed. Professional self-employed except lawyers, dentists, physicians, and members of other medical groups (taxable years ending after 1954). Additional regularly employed farm and domestic workers. Homeworkers.
	Elective by employer	U.S. citizens employed outside the United States by a foreign subsidiary of an American employer.
	Elective by employer and employee	State and local government employees (except fire fighters and police personnel) under a state or local government retirement system (coverage provided at state's option; a majority of the eligible employees must vote in favor). See above (elective by employer, 1950) for termination rule.
	Elective by individual	Members of the clergy and of religious orders not under a vow of poverty.
1956	...	Members of the uniformed services on active duty or on active duty for training. Remainder of professional self-employed except physicians (taxable years ending after 1955). Farm landlords who materially participate in farm operations.
	Elective by employer and employee	Fire fighters and police personnel in designated states. State and local government employees under a state or local government retirement system in designated states may be divided into two systems, one excluding employees not desiring coverage (new employees covered).
1960	...	U.S. citizens employed in United States by foreign governments or international organizations. Parents working for children (except domestic or casual labor). Workers in Guam and American Samoa.
1965	...	Interns. Self-employed physicians (taxable years ending on or after December 31, 1965). Tips for employee tax only.
	Elective by individual	Members of certain religious sects may obtain exemptions from self-employed coverage (retroactive to 1951).
1967	Elective by employer and employee	Fire fighters under state and local government retirement system (under a majority favorable vote) and only if governor of state certifies Social Security protection.
	Subject to waiver by individual	Members of the clergy and of religious orders not under a vow of poverty are covered automatically, but they can choose to be exempt on grounds of conscience or religious principles. Taxable years ending after 1967.
1972	Elective by employer	Members of a religious order who are subject to a vow of poverty. Retroactivity allowed for 5 years but not earlier than January 1, 1968.
1977	Elective by individual	Members of the clergy and of religious orders who filed an application for exemption from coverage may revoke the exemption if the revocation is filed before the due date of the individual's federal income tax return for the first taxable year beginning after December 20, 1977.
1982	...	Federal employees—Hospital Insurance (Part A) program only, effective January 1, 1983.
1983	...	Federal employees newly hired after December 31, 1983, including executive, legislative, and judicial branch employees, and also including those hired before January 1, 1984, with a break in service lasting more than 365 days. Excludes re-employed annuitants hired before January 1, 1984.
	...	Legislative branch employees hired before 1984 who were not participating in the Civil Service Retirement System on December 31, 1983.
	...	Members of Congress, the president, the vice president, sitting federal judges, and most executive-level political appointees of the federal government.
	...	Employees of nonprofit organizations.
	...	U.S. residents employed outside the United States by American employers.
	Elective by employer	U.S. residents employed outside the United States by a foreign affiliate of an American employer.
	...	Employees of nonprofit organizations placed under compulsory coverage; nonprofit organizations prohibited from terminating coverage of their employees on or after March 31, 1983.
	Elective by employer or by employer and employee	States prohibited from terminating coverage of employees (after April 20, 1983) and permitted to reinstate coverage for a terminated group.

(Continued)

2.A OASDI: Coverage, Financing, and Insured Status

Table 2.A1—Covered employment and self-employment provisions, by year enacted—Continued

Year enacted	Coverage election or waiver	Provision
1984	...	Rehired federal employees whose previous service was covered.
	...	Persons exercising reemployment rights to noncovered federal employment retain exemption after a period (not limited to 365 or fewer days) of military or national guard service or work for an international organization.
	...	Generally, all legislative branch employees except those who were participating on December 31, 1983, and are also currently participating in the Civil Service Retirement System or another federal retirement system.
	...	Employees of nonprofit organizations who are also participating on a mandatory basis in the Civil Service Retirement System are treated like federal employees for Social Security tax and coverage purposes. They are therefore not covered unless hired on or after January 1, 1984, or reemployed after a break in service of more than 365 days.
	Elective by employer	Churches or church-related organizations may elect irrevocably to have services performed by their employees excluded from covered employment. Their employees are then treated as self-employed for Social Security purposes.
1986	...	State and local government employees hired after March 31, 1986—Hospital Insurance (Part A) program only.
	Elective by individual	Members of the clergy and of religious orders who filed an application for exemption from coverage may revoke the exemption if the revocation is filed before the due date of the individual's federal income tax return for the first taxable year beginning after October 22, 1986.
	Elective by employee	Employees covered under Civil Service Retirement System can elect to switch to Federal Employees Retirement System from July 1, 1987, to December 31, 1987.
1987	...	Members of uniformed services reserve components on inactive duty training. Irregularly employed farm workers (if employer's annual expenditures for farm labor is at least \$2,500). Services performed in trade or business of spouse or by children aged 18 or older in trade or business of parent. For employers, the full amount of covered tips.
1990	...	State and local government employees not under a state or local government retirement system. Exceptions: (1) students employed by the educational institution they attend and (2) election workers paid less than the mandated amount (\$100), unless either group covered under a state's Section 218 agreement.
1994	...	Threshold for exclusion of wages paid to election workers raised from \$100 to \$1,000 annually beginning January 1, 1995, and will be indexed for wage increases each year after December 31, 1999.
	...	Police and fire fighters under a public retirement system can be covered for Social Security in all states.
	...	Threshold for coverage of domestic employees' earnings raised from \$50 per calendar quarter to \$1,000 per calendar year per employer; amount subject to annual automatic adjustments. Domestic workers no longer covered for years in which they were under age 18, unless they are no longer in school and domestic employment is their principal occupation. Coverage of earnings of domestic workers on farms becomes subject to new annual threshold for domestic workers instead of annual threshold for agricultural employees.
1997	Elective by employee	Employees covered under Civil Service Retirement System can elect to switch to Federal Employees Retirement System from July 1, 1998, to December 31, 1998.
1998	...	States can modify their Social Security coverage agreements made between January 1, 1999, and March 31, 1999, to exclude from coverage services performed by students employed by state schools, colleges, or universities, effective for services performed after June 30, 2000.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

NOTE: ... = not applicable.

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Table 2.A2—Noncontributory wage credit provisions, by year enacted

Year enacted	Provision
1946	Fully insured status and average monthly wage of \$160 for World War II veterans who died within 3 years after discharge.
1950	Wage credits of \$160 per month of military service during World War II period (September 16, 1940–July 24, 1947).
1952	Wage credits of \$160 per month of military service to December 31, 1953.
1953	Wage credits of \$160 per month of military service to June 30, 1955.
1955	Wage credits of \$160 per month of military service to March 31, 1956.
1956	Wage credits of \$160 per month of military service to December 31, 1956.
1967	For uniformed services, wage credits of \$100 for each \$100 (or fraction thereof) of basic pay not in excess of \$300 per calendar quarter, beginning in 1968.
1972	For uniformed services, wage credits of \$300 per calendar quarter of service after 1956. (Supersedes 1967 provision.) For U.S. citizens of Japanese ancestry, wage credits for the period they were interned by the U.S. government during World War II period (December 7, 1941–December 31, 1946) and who were aged 18 or older.
1977	For uniformed services, wage credits of \$100 for each \$300 of basic pay up to maximum credit of \$1,200 per calendar year after 1977.
2002	For uniformed services, deemed wage credits are eliminated for all years after calendar year 2001. Deemed wage credits will continue to be given for appropriate earnings for periods prior to calendar year 2002.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

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2.A OASDI: Coverage, Financing, and Insured Status

Table 2.A3—Annual maximum taxable earnings and contribution rates, 1937–2010

Year	Annual maximum taxable earnings (dollars)		Contribution rate (percent)								
			Employer and employee, each				Self-employed person				
	OASDI	HI	Total, OASDI and HI	OASI	DI	HI	Total, OASDI and HI	OASI	DI	HI	
1937–1949	3,000	...	1.0	1.0	...	...	...	...	...	...	...
1950	3,000	...	1.5	1.5	...	...	...	...	...	...	...
1951–1953	3,600	...	1.5	1.5	...	...	2.25	2.25	...	...	...
1954	3,600	...	2.0	2.0	...	...	3.0	3.0	...	...	...
1955–1956	4,200	...	2.0	2.0	...	...	3.0	3.0	...	...	...
1957–1958	4,200	...	2.25	2.0	0.25	...	3.375	3.0	0.375	...	...
1959	4,800	...	2.5	2.25	0.25	...	3.75	3.375	0.375	...	...
1960–1961	4,800	...	3.0	2.75	0.25	...	4.5	4.125	0.375	...	...
1962	4,800	...	3.125	2.875	0.25	...	4.7	4.325	0.375	...	...
1963–1965	4,800	...	3.625	3.375	0.25	...	5.4	5.025	0.375	...	...
1966	6,600	6,600	4.2	3.5	0.35	0.35	6.15	5.275	0.525	0.35	0.35
1967	6,600	6,600	4.4	3.55	0.35	0.5	6.4	5.375	0.525	0.5	0.5
1968	7,800	7,800	4.4	3.325	0.475	0.6	6.4	5.0875	0.7125	0.6	0.6
1969	7,800	7,800	4.8	3.725	0.475	0.6	6.9	5.5875	0.7125	0.6	0.6
1970	7,800	7,800	4.8	3.65	0.55	0.6	6.9	5.475	0.825	0.6	0.6
1971	7,800	7,800	5.2	4.05	0.55	0.6	7.5	6.075	0.825	0.6	0.6
1972	9,000	9,000	5.2	4.05	0.55	0.6	7.5	6.075	0.825	0.6	0.6
1973	10,800	10,800	5.85	4.3	0.55	1.0	8.0	6.205	0.795	1.0	1.0
1974	13,200	13,200	5.85	4.375	0.575	0.9	7.9	6.185	0.815	0.9	0.9
1975	^a 14,100	^a 14,100	5.85	4.375	0.575	0.9	7.9	6.185	0.815	0.9	0.9
1976	^a 15,300	^a 15,300	5.85	4.375	0.575	0.9	7.9	6.185	0.815	0.9	0.9
1977	^a 16,500	^a 16,500	5.85	4.375	0.575	0.9	7.9	6.185	0.815	0.9	0.9
1978	^a 17,700	^a 17,700	6.05	4.275	0.775	1.0	8.1	6.01	1.09	1.0	1.0
1979	^a 22,900	^a 22,900	6.13	4.33	0.75	1.05	8.1	6.01	1.04	1.05	1.05
1980	25,900	25,900	6.13	4.52	0.56	1.05	8.1	6.2725	0.7775	1.05	1.05
1981	29,700	29,700	6.65	4.7	0.65	1.3	9.3	7.025	0.975	1.3	1.3
1982	^a 32,400	^a 32,400	6.7	4.575	0.825	1.3	9.35	6.8125	1.2375	1.3	1.3
1983	^a 35,700	^a 35,700	6.7	4.775	0.625	1.3	9.35	7.1125	0.9375	1.3	1.3
1984	^a 37,800	^a 37,800	^b 7.0	5.2	0.5	1.3	^b 14.0	10.4	1.0	2.6	2.6
1985	^a 39,600	^a 39,600	7.05	5.2	0.5	1.35	^b 14.1	10.4	1.0	2.7	2.7
1986	^a 42,000	^a 42,000	7.15	5.2	0.5	1.45	^b 14.3	10.4	1.0	2.9	2.9
1987	^a 43,800	^a 43,800	7.15	5.2	0.5	1.45	^b 14.3	10.4	1.0	2.9	2.9
1988	^a 45,000	^a 45,000	7.51	5.53	0.53	1.45	^b 15.02	11.06	1.06	2.9	2.9
1989	^a 48,000	^a 48,000	7.51	5.53	0.53	1.45	^b 15.02	11.06	1.06	2.9	2.9
1990	^c 51,300	^c 51,300	7.65	5.6	0.6	1.45	15.3	11.2	1.2	2.9	2.9
1991	^c 53,400	^d 125,000	7.65	5.6	0.6	1.45	15.3	11.2	1.2	2.9	2.9
1992	^c 55,500	130,200	7.65	5.6	0.6	1.45	15.3	11.2	1.2	2.9	2.9
1993	^a 57,600	^a 135,000	7.65	5.6	0.6	1.45	15.3	11.2	1.2	2.9	2.9
1994	^a 60,600	^e	7.65	5.26	0.94	1.45	15.3	10.52	1.88	2.9	2.9
1995	^a 61,200	^e	7.65	5.26	0.94	1.45	15.3	10.52	1.88	2.9	2.9
1996	^a 62,700	^e	7.65	5.26	0.94	1.45	15.3	10.52	1.88	2.9	2.9
1997	^a 65,400	^e	7.65	5.35	0.85	1.45	15.3	10.7	1.7	2.9	2.9
1998	^a 68,400	^e	7.65	5.35	0.85	1.45	15.3	10.7	1.7	2.9	2.9
1999	^a 72,600	^e	7.65	5.35	0.85	1.45	15.3	10.7	1.7	2.9	2.9

(Continued)

2.A OASDI: Coverage, Financing, and Insured Status

Table 2.A3—Annual maximum taxable earnings and contribution rates, 1937–2010—Continued

Year	Annual maximum taxable earnings (dollars)		Contribution rate (percent)							
			Employer and employee, each				Self-employed person			
	OASDI	HI	Total, OASDI and HI	OASI	DI	HI	Total, OASDI and HI	OASI	DI	HI
2000	^a 76,200	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2001	^a 80,400	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2002	^a 84,900	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2003	^a 87,000	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2004	^a 87,900	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2005	^a 90,000	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2006	^a 94,200	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2007	^a 97,500	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2008	^a 102,000	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2009	^a 106,800	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2010	^a 106,800	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTE: DI = Disability Insurance; HI = Hospital Insurance; OASI = Old-Age and Survivors Insurance; OASDI = Old-Age, Survivors, and Disability Insurance; . . . = not applicable.

- a. Based on automatic adjustment, under legislation in 1972 (as modified by legislation in 1973), in proportion to increases in average wage level.
- b. Tables 2.A3 and 2.A4 show the tax rate and tax amount paid by employers and received by the OASDI trust funds. In 1984, the 5.7 percent OASDI tax on taxable wages of employees was offset by a tax credit of 0.3 percent, resulting in an effective employee tax rate of 5.4 percent. However, the OASDI trust funds received the full 5.7 percent because of a general revenue transfer equivalent to 0.3 percent of taxable wages. Similar credits of 2.7 percent, 2.3 percent, and 2.0 percent were allowed against the combined OASDI and HI taxes on net earnings from self-employment in 1984, 1985, and from 1986 to 1989, respectively.
- c. Based on automatic adjustment, under legislation in 1972 (as modified by legislation in 1973), using a transitional rule, specified by the Omnibus Budget Reconciliation Act (OBRA) of 1989, for computing a "deemed" average annual wage for 1988, 1989, and 1990.
- d. Based on legislation in 1990.
- e. Upper limit on earnings subject to HI taxes was repealed by OBRA 1993.

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2.A OASDI: Coverage, Financing, and Insured Status

Table 2.A4—Maximum annual amount of contributions, 1937–2010 (in dollars)

Year	Employee					Self-employed person				
	Total, OASDI and HI	Subtotal, OASDI	OASI	DI	HI	Total, OASDI and HI	Subtotal, OASDI	OASI	DI	HI
1937–1949	30.00	30.00	30.00	...	...	...	...	...	...	...
1950	45.00	45.00	45.00	...	...	...	...	...	...	...
1951–1953	54.00	54.00	54.00	...	...	81.00	81.00	81.00	...	...
1954	72.00	72.00	72.00	...	...	108.00	108.00	108.00	...	...
1955–1956	84.00	84.00	84.00	...	...	126.00	126.00	126.00	...	...
1957–1958	94.50	94.50	84.00	10.50	...	141.75	141.75	126.00	15.75	...
1959	120.00	120.00	108.00	12.00	...	180.00	180.00	162.00	18.00	...
1960–1961	144.00	144.00	132.00	12.00	...	216.00	216.00	198.00	18.00	...
1962	150.00	150.00	138.00	12.00	...	225.60	225.60	207.60	18.00	...
1963–1965	174.00	174.00	162.00	12.00	...	259.20	259.20	241.20	18.00	...
1966	277.20	254.10	231.00	23.10	23.10	405.90	382.80	348.15	34.65	23.10
1967	290.40	257.40	234.30	23.10	33.00	422.40	389.40	354.75	34.65	33.00
1968	343.20	296.40	259.35	37.05	46.80	499.20	452.40	396.825	55.575	46.80
1969	374.40	327.60	290.55	37.05	46.80	538.20	491.40	435.825	55.575	46.80
1970	374.40	327.60	284.70	42.90	46.80	538.20	491.40	427.05	64.35	46.80
1971	405.60	358.80	315.90	42.90	46.80	585.00	538.20	473.85	64.35	46.80
1972	468.00	414.00	364.50	49.50	54.00	675.00	621.00	546.75	74.25	54.00
1973	631.80	523.80	464.40	59.40	108.00	864.00	756.00	670.14	85.86	108.00
1974	772.20	653.40	577.50	75.90	118.80	1,042.80	924.00	816.42	107.58	118.80
1975	824.85	697.95	616.875	81.075	126.90	1,113.90	987.00	872.085	114.915	126.90
1976	895.05	757.35	669.375	87.975	137.70	1,208.70	1,071.00	946.305	124.695	137.70
1977	965.25	816.75	721.875	94.875	148.50	1,303.50	1,155.00	1,020.525	134.475	148.50
1978	1,070.85	893.85	756.675	137.175	177.00	1,433.70	1,256.70	1,063.77	192.93	177.00
1979	1,403.77	1,163.32	991.59	171.75	240.45	1,854.90	1,614.45	1,376.29	238.16	240.45
1980	1,587.67	1,315.72	1,170.68	145.04	271.95	2,097.90	1,825.95	1,624.58	201.37	271.95
1981	1,975.05	1,588.95	1,395.90	193.05	386.10	2,762.10	2,376.00	2,086.43	289.57	386.10
1982	2,170.80	1,749.60	1,482.30	267.30	421.20	3,029.40	2,608.20	2,207.25	400.95	421.20
1983	2,391.90	1,927.80	1,704.675	223.125	464.10	3,337.95	2,873.85	2,539.1625	334.6875	464.10
1984 ^a	2,646.00	2,154.60	1,965.60	189.00	491.40	5,292.00	4,309.20	3,931.20	378.00	982.80
1985 ^a	2,791.80	2,257.20	2,059.20	198.00	534.60	5,583.60	4,514.40	4,118.40	396.00	1,069.20
1986 ^a	3,003.00	2,394.00	2,184.00	210.00	609.00	6,006.00	4,788.00	4,368.00	420.00	1,218.00
1987 ^a	3,131.70	2,496.60	2,277.60	219.00	635.10	6,263.40	4,993.20	4,555.20	438.00	1,270.20
1988 ^a	3,379.50	2,727.00	2,488.50	238.50	652.50	6,759.00	5,454.00	4,977.00	477.00	1,305.00
1989 ^a	3,604.80	2,908.80	2,654.40	254.40	696.00	7,209.60	5,817.60	5,308.80	508.80	1,392.00
1990	3,924.45	3,180.60	2,872.80	307.80	743.85	7,848.90	6,361.20	5,745.60	615.60	1,487.70
1991	5,123.30	3,310.80	2,990.40	320.40	1,812.50	10,246.60	6,621.60	5,980.80	640.80	3,625.00
1992	5,328.90	3,441.00	3,108.00	333.00	1,887.90	10,657.80	6,882.00	6,216.00	666.00	3,775.80
1993	5,528.70	3,571.20	3,225.60	345.60	1,957.50	11,057.40	7,142.40	6,451.20	691.20	3,915.00
1994	^b	3,757.20	3,187.56	569.64	^b	^b	7,514.40	6,375.12	1,139.28	^b
1995	^b	3,794.40	3,219.12	575.28	^b	^b	7,588.80	6,438.24	1,150.56	^b
1996	^b	3,887.40	3,298.02	589.38	^b	^b	7,774.80	6,596.04	1,178.76	^b
1997	^b	4,054.80	3,498.90	555.90	^b	^b	8,109.60	6,997.80	1,111.80	^b
1998	^b	4,240.80	3,659.40	581.40	^b	^b	8,481.60	7,318.80	1,162.80	^b
1999	^b	4,501.20	3,884.10	617.10	^b	^b	9,002.40	7,768.20	1,234.20	^b

(Continued)

2.A OASDI: Coverage, Financing, and Insured Status

Table 2.A4—Maximum annual amount of contributions, 1937–2010 (in dollars)—Continued

Year	Employee					Self-employed person				
	Total, OASDI and HI	Subtotal, OASDI	OASI	DI	HI	Total, OASDI and HI	Subtotal, OASDI	OASI	DI	HI
2000	b	4,724.40	4,038.60	685.80	b	b	9,448.80	8,077.20	1,371.60	b
2001	b	4,984.80	4,261.20	723.60	b	b	9,969.60	8,522.40	1,447.20	b
2002	b	5,236.80	4,499.70	764.10	b	b	10,527.60	8,999.40	1,528.20	b
2003	b	5,394.00	4,611.00	783.00	b	b	10,788.00	9,222.00	1,566.00	b
2004	b	5,449.80	4,658.70	791.10	b	b	10,899.60	9,317.40	1,582.20	b
2005	b	5,580.00	4,770.00	810.00	b	b	11,160.00	9,540.00	1,620.00	b
2006	b	5,840.40	4,992.60	847.80	b	b	11,680.80	9,985.20	1,695.60	b
2007	b	6,045.00	5,167.50	877.50	b	b	12,090.00	10,335.00	1,755.00	b
2008	b	6,324.00	5,406.00	918.00	b	b	12,648.00	10,812.00	1,836.00	b
2009	b	6,621.60	5,660.40	961.20	b	b	13,243.20	11,320.80	1,922.40	b
2010	b	6,621.60	5,660.40	961.20	b	b	13,243.20	11,320.80	1,922.40	b

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTE: DI = Disability Insurance; HI = Hospital Insurance; OASI = Old-Age and Survivors Insurance; OASDI = Old-Age, Survivors, and Disability Insurance; . . . = not applicable.

- a. Tables 2.A3 and 2.A4 show the tax rate and tax amount paid by employers and received by the OASDI trust funds. In 1984, the 5.7 percent OASDI tax on taxable wages of employees was offset by a tax credit of 0.3 percent, resulting in an effective employee tax rate of 5.4 percent. However, the OASDI trust funds received the full 5.7 percent because of a general revenue transfer equivalent to 0.3 percent of taxable wages. Similar credits of 2.7 percent, 2.3 percent, and 2.0 percent were allowed against the combined OASDI and HI taxes on net earnings from self-employment in 1984, 1985, and from 1986 to 1989, respectively.
- b. Upper limit on earnings subject to HI taxes was repealed by the Omnibus Budget Reconciliation Act (OBRA) of 1993.

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2.A OASDI: Coverage, Financing, and Insured Status

Table 2.A5—Tax credits enacted in 1983

Group	Tax payable under—	Percentage of earnings	Tax credit, effective with respect to—
Employee	Federal Insurance Contributions Act (FICA)	0.3	Remuneration paid in calendar year 1984
Self-employed	Self-Employment Contributions Act (SECA)	2.7	Self-employment income for taxable years beginning in 1984
		2.3	Self-employment income for taxable years beginning in 1985
		2.0	Self-employment income for taxable years beginning in 1986, 1987, 1988, and 1989

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

NOTES: During this period, scheduled taxes were credited to the Social Security (Old-Age, Survivors, and Disability Insurance, or OASDI) trust funds, monies for tax credits were paid from the Treasury, and the reduced tax rates were paid by employees and the self-employed.

Tables 2.A3 and 2.A4 show the tax rate and tax amount paid by employers and received by the OASDI trust funds. In 1984, the 5.7 percent OASDI tax on taxable wages of employees was offset by a tax credit of 0.3 percent, resulting in an effective employee tax rate of 5.4 percent. However, the OASDI trust funds received the full 5.7 percent because of a general revenue transfer equivalent to 0.3 percent of taxable wages. Similar credits of 2.7 percent, 2.3 percent, and 2.0 percent were allowed against the combined OASDI and Hospital Insurance (HI) taxes on net earnings from self-employment in 1984, 1985, and from 1986 to 1989, respectively.

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Table 2.A6—Appropriations from general revenues and interfund borrowing provisions, by type of transaction and year enacted

Year enacted	Provision
<i>Appropriations from general revenues</i>	
1935	Annual appropriations to the old-age reserve account to provide payments; direct appropriation to pay for administrative expenses.
1939	Trust fund created from which benefits and administrative expenses were to be paid.
1944	General authorization to finance benefits and payments.
1947	For cost of gratuitous military service wage credits.
1950	General authorization repealed.
1951	Railroad interchange provisions enacted.
1956	For cost of gratuitous military service wage credits.
1966	For cost of transitional uninsured monthly benefits for those aged 72 and older with fewer than 3 quarters of coverage.
1972	For cost of gratuitous wage credits for Japanese-American internees.
1983	<p>A lump-sum payment to the Old-Age, Survivors, and Disability Insurance (OASDI) trust funds equal to (1) the present value of the estimated additional benefits arising from the gratuitous military service wage credits for service before 1957 and (2) the amount of the combined employer-employee OASDI taxes on the gratuitous wage credits for service after 1956 and before 1984 but less any amounts previously transferred. After 1983, the trust funds will be reimbursed on a current basis for employer-employee taxes on such wage credits for service after 1983.</p> <p>A lump-sum payment to the OASDI trust funds representing the amount of uncashed benefit checks (including interest) issued in the past. In the future, the trust funds will be credited on a regular basis. All transfers made for uncashed benefit checks will be subject to the annual appropriation process.</p> <p>Transfers in each year from the Treasury Department to the OASDI trust funds of amounts equal to income tax receipts attributable to inclusion of Social Security benefits in taxable income.</p> <p>For tax credits for part of the 1984 employment FICA tax and part of the tax on self-employment income under SECA for 1984–1989, see Table 2.A5.</p>
1993	Transfers in each year from the Treasury Department to the Hospital Insurance (HI) trust fund of amounts equal to income tax receipts attributable to the increased portions of Social Security benefits included in taxable income under the 1993 Act.
<i>Interfund borrowing</i>	
1981	Interfund borrowing permitted among Old-Age and Survivors Insurance (OASI), Disability Insurance (DI), and Hospital Insurance (HI) trust funds as needed until December 31, 1982. For all or part of any loan to be repaid, the managing trustee determines if assets of borrowing trust fund(s) are sufficient for that purpose. Interest with respect to any outstanding loan balance at a rate equal to the rate earned by lending trust fund is transferred from time to time.
1983	Interfund borrowing reauthorized among OASI, DI, and HI trust funds for calendar years 1983–1987, with provisions for scheduled repayment, no later than December 31, 1989, of principal and interest (including amounts borrowed in 1982). No borrowing permitted from any fund that has been reduced to specified levels.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

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2.A OASDI: Coverage, Financing, and Insured Status

Table 2.A7—Insured status (benefit eligibility) provisions, by eligibility concept and year enacted

Year enacted	Provision																																																																		
Quarter of coverage																																																																			
1939	Calendar quarter in which \$50 of wages is earned. Four quarters of coverage (QC) are credited for covered earnings equal to maximum limitation for the year.																																																																		
1946	Calendar quarter in which \$50 of wages is paid.																																																																		
1950	Calendar quarter credited with \$100 of self-employment income (reported annually).																																																																		
1954	Calendar quarter credited with \$100 of agricultural wages (reported annually).																																																																		
1977	Calendar quarters of coverage (up to 4) for each \$250 of annual earnings, effective January 1, 1978 (<i>effective on January 1 of each year, dollar amount subject to automatic increase</i>):																																																																		
	<table border="0"> <thead> <tr> <th style="text-align: left;">Year</th> <th style="text-align: right;">Amount (dollars)</th> </tr> </thead> <tbody> <tr><td>1979</td><td style="text-align: right;">260</td></tr> <tr><td>1980</td><td style="text-align: right;">290</td></tr> <tr><td>1981</td><td style="text-align: right;">310</td></tr> <tr><td>1982</td><td style="text-align: right;">340</td></tr> <tr><td>1983</td><td style="text-align: right;">370</td></tr> <tr><td>1984</td><td style="text-align: right;">390</td></tr> <tr><td>1985</td><td style="text-align: right;">410</td></tr> <tr><td>1986</td><td style="text-align: right;">440</td></tr> <tr><td>1987</td><td style="text-align: right;">460</td></tr> <tr><td>1988</td><td style="text-align: right;">470</td></tr> <tr><td>1989</td><td style="text-align: right;">500</td></tr> <tr><td>1990</td><td style="text-align: right;">520</td></tr> <tr><td>1991</td><td style="text-align: right;">540</td></tr> <tr><td>1992</td><td style="text-align: right;">570</td></tr> <tr><td>1993</td><td style="text-align: right;">590</td></tr> <tr><td>1994</td><td style="text-align: right;">620</td></tr> <tr><td>1995</td><td style="text-align: right;">630</td></tr> <tr><td>1996</td><td style="text-align: right;">640</td></tr> <tr><td>1997</td><td style="text-align: right;">670</td></tr> <tr><td>1998</td><td style="text-align: right;">700</td></tr> <tr><td>1999</td><td style="text-align: right;">740</td></tr> <tr><td>2000</td><td style="text-align: right;">780</td></tr> <tr><td>2001</td><td style="text-align: right;">830</td></tr> <tr><td>2002</td><td style="text-align: right;">870</td></tr> <tr><td>2003</td><td style="text-align: right;">890</td></tr> <tr><td>2004</td><td style="text-align: right;">900</td></tr> <tr><td>2005</td><td style="text-align: right;">920</td></tr> <tr><td>2006</td><td style="text-align: right;">970</td></tr> <tr><td>2007</td><td style="text-align: right;">1,000</td></tr> <tr><td>2008</td><td style="text-align: right;">1,050</td></tr> <tr><td>2009</td><td style="text-align: right;">1,090</td></tr> <tr><td>2010</td><td style="text-align: right;">1,120</td></tr> </tbody> </table>	Year	Amount (dollars)	1979	260	1980	290	1981	310	1982	340	1983	370	1984	390	1985	410	1986	440	1987	460	1988	470	1989	500	1990	520	1991	540	1992	570	1993	590	1994	620	1995	630	1996	640	1997	670	1998	700	1999	740	2000	780	2001	830	2002	870	2003	890	2004	900	2005	920	2006	970	2007	1,000	2008	1,050	2009	1,090	2010	1,120
Year	Amount (dollars)																																																																		
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Disability definition																																																																			
1954	Inability to engage in substantial gainful activity because of any medically determinable permanent physical or mental impairment.																																																																		
1965	Disability lasting at least 12 months. For blind persons aged 55–64, inability to engage in usual occupation.																																																																		
1967	Disability that precludes engagement in any substantial gainful work existing in the national economy. For surviving spouse, disability precludes any gainful activity.																																																																		
1990	More restrictive definition for surviving spouse eliminated.																																																																		
Period of disability																																																																			
1954	Continuous period of at least 6 months as defined above or of blindness.																																																																		
1972	At least 5 months of disability.																																																																		

(Continued)

2.A OASDI: Coverage, Financing, and Insured Status

Table 2.A7—Insured status (benefit eligibility) provisions, by eligibility concept and year enacted—Continued

Year enacted	Provision
Fully insured	
1935	Cumulative wages of \$2,000 and employment in each of 5 years after 1936 and before attainment of age 65.
1939	QC equal to one-half the quarters elapsed after 1936 (or quarter in which age 21 attained) and before quarter of death or attainment of age 65. Minimum 6 QC, maximum 40 QC.
1950	Elapsed period measured after 1950 (QC earned at any time are used).
1954	Period of disability excluded from elapsed period. Alternatively, QC earned in all quarters after 1954 and before quarter in which age 65 attained (minimum 6 QC).
1956	Elapsed period measured to age 62 for women. Alternatively, QC earned in all except 4 quarters after 1954 and before quarter in which age 65 attained (62 for women).
1960	QC reduced to one-third the elapsed quarters.
1961	QC equal to years elapsed after 1950 (or year age 21 attained) and before year of death or age 65 (62 for women).
1972	Elapsed period for men reaching age 62 after 1972, measured to age 62 or to 1975, if later.
1983	Any person aged 55 or older on January 1, 1984, and employed by a nonprofit organization to whose employees coverage is extended solely by reason of the new compulsory coverage provision will be deemed fully insured upon subsequently acquiring 6 QC if aged 60 or older on January 1, 1984; 8 QC if aged 59; 12 QC if aged 58; 16 QC if aged 57; and 20 QC if aged 55 or 56.
2004	Workers who are not citizens or nationals of the United States (referred to here as noncitizens) must meet additional requirements to be fully or currently insured. Noncitizen workers whose Social Security number (SSN) was originally assigned on or after January 1, 2004, must have been issued an SSN for work purposes at any time on or after January 1, 2004; or must have been admitted to the United States at any time as a nonimmigrant visitor for business (B-1) or as an alien crewman (D-1 or D-2).
Currently insured	
1939	6 QC earned in 12 quarters before quarter of death.
1946	6 QC earned in preceding 13 quarters, including quarter of death.
1950	Including quarter of retirement added.
1954	Including quarter of disablement added.
2004	Workers who are not citizens or nationals of the United States (referred to here as noncitizens) must meet additional requirements to be fully or currently insured. Noncitizen workers whose Social Security number (SSN) was originally assigned on or after January 1, 2004, must have been issued an SSN for work purposes at any time on or after January 1, 2004; or must have been admitted to the United States at any time as a nonimmigrant visitor for business (B-1) or as an alien crewman (D-1 or D-2).
Disability insured	
1954	20 QC earned in last 40 quarters, including quarter of disablement, and currently insured.
1956	Fully insured requirement added.
1958	Currently insured requirement eliminated.
1960	Alternatively, 20 QC earned before quarter of disablement (not necessarily in last 40 quarters) but QC earned in all quarters after 1950, with minimum of 6 QC.
1965	Alternatively, for blind under age 31, QC earned in one-half the quarters elapsed after age 21, with minimum of 6 QC. For blind under age 24, 6 QC earned in preceding 12 quarters.
1967	For all disabled under age 31, same alternative.
1972	For blind, requirement for recent QC eliminated.
1983	For those who become disabled again at age 31 or older and who were previously disabled before age 31, same alternative as that for those under age 31.
Transitionally insured	
1965	Same as fully insured, but minimum reduced to 3 QC.
Requirement for special age-72 monthly benefit	
1966	3 QC for each year elapsed after 1966 and before attainment of age 72. (No QC if aged 72 before 1968.)

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A8—Factors for indexing earnings, 1951–2010

Year	Annual maximum taxable earnings (dollars)	Average annual wage ^a (dollars)	Factors for workers who were first eligible (attained age 62, became disabled, or died) in ^b —							
			1995	1996	1997	1998	1999	2000	2001	2002
1951	3,600	2,799.16	8.2641471	8.4859494	8.8260978	9.2577416	9.7979394	10.3107504	10.8853513	11.4873105
1952	3,600	2,973.32	7.7800809	7.9888912	8.3091157	8.7154763	9.2240324	9.7068059	10.2477500	10.8144498
1953	3,600	3,139.44	7.3684065	7.5661679	7.8694481	8.2543065	8.7359529	9.1931809	9.7055016	10.2422152
1954	3,600	3,155.64	7.3305795	7.5273257	7.8290489	8.2119317	8.6911054	9.1459862	9.6556768	10.1896351
1955	4,200	3,301.44	7.0068425	7.1948998	7.4832982	7.8492718	8.3072841	8.7420762	9.2292575	9.7396348
1956	4,200	3,532.36	6.5487861	6.7245496	6.9940946	7.3361435	7.7642143	8.1705828	8.6259158	9.1029284
1957	4,200	3,641.72	6.3521276	6.5226129	6.7840636	7.1158409	7.5310568	7.9252221	8.3668816	8.8295695
1958	4,200	3,673.80	6.2966601	6.4656568	6.7248244	7.0537046	7.4652948	7.8560183	8.2938211	8.7524688
1959	4,800	3,855.80	5.9994476	6.1604673	6.4074018	6.7207583	7.1129208	7.4852015	7.9023393	8.3393381
1960	4,800	4,007.12	5.7728918	5.9278310	6.1654405	6.4669638	6.8443171	7.2025395	7.6039250	8.0244215
1961	4,800	4,086.76	5.6603936	5.8123134	6.0452926	6.3409400	6.7109397	7.0621813	7.4557449	7.8680471
1962	4,800	4,291.40	5.3904716	5.5351470	5.7570164	6.0385655	6.3909214	6.7254136	7.1002097	7.4928508
1963	4,800	4,396.64	5.2614428	5.4026552	5.6192138	5.8940236	6.2379453	6.5644310	6.9302558	7.3134985
1964	4,800	4,576.32	5.0548629	5.1905308	5.3985866	5.6626066	5.9930250	6.3066918	6.6581533	7.0263487
1965	4,800	4,658.72	4.9654562	5.0987245	5.3031004	5.5624506	5.8870248	6.1951437	6.5403888	6.9020718
1966	6,600	4,938.36	4.6842818	4.8100037	5.0028066	5.2474708	5.5536656	5.8443370	6.1700322	6.5112345
1967	6,600	5,213.44	4.4371221	4.5562105	4.7388404	4.9705952	5.2606341	5.5359686	5.8444789	6.1676782
1968	7,800	5,571.76	4.1517707	4.2632005	4.4340855	4.6509361	4.9223226	5.1799503	5.4686203	5.7710346
1969	7,800	5,893.76	3.9249427	4.0302846	4.1918334	4.3968367	4.6533961	4.8969486	5.1698474	5.4557396
1970	7,800	6,186.24	3.7393748	3.8397363	3.9936472	4.1889581	4.4333876	4.6654252	4.9254216	5.1977970
1971	7,800	6,497.08	3.5604718	3.6560316	3.8025790	3.9885456	4.2212809	4.4422171	4.6897745	4.9491187
1972	9,000	7,133.80	3.2426855	3.3297163	3.4631837	3.6325521	3.8445148	4.0457316	4.2711935	4.5073902
1973	10,800	7,580.16	3.0517390	3.1336449	3.2592531	3.4186482	3.6181294	3.8074975	4.0196830	4.2419711
1974	13,200	8,030.76	2.8805082	2.9578184	3.0763788	3.2268303	3.4151189	3.5938616	3.7941415	4.0039573
1975	14,100	8,630.92	2.6802091	2.7521435	2.8624596	3.0024493	3.1776450	3.3439587	3.5303119	3.7255379
1976	15,300	9,226.48	2.5072043	2.5744954	2.6776907	2.8086443	2.9725312	3.1281095	3.3024339	3.4850582
1977	16,500	9,779.44	2.3654391	2.4289254	2.5262858	2.6498348	2.8044551	2.9512365	3.1157040	3.2880022
1978	17,700	10,556.03	2.1914176	2.2502333	2.3404310	2.4548907	2.5981359	2.7341188	2.8864867	3.0461092
1979	22,900	11,479.46	2.0151357	2.0692202	2.1521622	2.2574145	2.3891368	2.5141810	2.6542921	2.8010743
1980	25,900	12,513.46	1.8486230	1.8982384	1.9743268	2.0708821	2.1917200	2.3064316	2.4349652	2.5696186
1981	29,700	13,773.10	1.6795543	1.7246321	1.7937618	1.8814864	1.9912728	2.0954934	2.2122717	2.3346102
1982	32,400	14,531.34	1.5919158	1.6346414	1.7001639	1.7833111	1.8873690	1.9861513	2.0968362	2.2127911
1983	35,700	15,239.24	1.5179674	1.5587083	1.6211871	1.7004719	1.7996960	1.8938897	1.9994330	2.1100015
1984	37,800	16,135.07	1.4336889	1.4721678	1.5311777	1.6060606	1.6997757	1.7887397	1.8884232	1.9928528
1985	39,600	16,822.51	1.3751022	1.4120087	1.4686072	1.5404301	1.6303156	1.7156441	1.8112541	1.9114163
1986	42,000	17,321.82	1.3354642	1.3713068	1.4262739	1.4960264	1.5833209	1.6661898	1.7590438	1.8563188
1987	43,800	18,426.51	1.2554016	1.2890954	1.3407672	1.4063379	1.4883991	1.5662999	1.6535871	1.7450304
1988	45,000	19,334.04	1.1964737	1.2285860	1.2778323	1.3403251	1.4185344	1.4927785	1.5759686	1.6631196
1989	48,000	20,099.55	1.1509049	1.1817941	1.2291648	1.2892776	1.3645082	1.4359247	1.5159464	1.5997781
1990	51,300	21,027.98	1.1000900	1.1296154	1.1748946	1.2323533	1.3042622	1.3725256	1.4490141	1.5291445
1991	53,400	21,811.60	1.0605673	1.0890320	1.1326844	1.1880788	1.2574043	1.3232152	1.3969557	1.4742073
1992	55,500	22,935.42	1.0086002	1.0356702	1.0771837	1.1298638	1.1957924	1.2583785	1.3285059	1.4019721
1993	57,600	23,132.67	1.0000000	1.0268391	1.0679986	1.1202295	1.1855960	1.2476485	1.3171778	1.3900177
1994	60,600	23,753.53	1.0000000	1.0000000	1.0400837	1.0909494	1.1546073	1.2150379	1.2827500	1.3536860
1995	61,200	24,705.66	1.0000000	1.0000000	1.0000000	1.0489054	1.1101100	1.1682117	1.2333141	1.3015163
1996	62,700	25,913.90	1.0000000	1.0000000	1.0000000	1.0000000	1.0583509	1.1137436	1.1758107	1.2408329
1997	65,400	27,426.00	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0523387	1.1109837	1.1724211
1998	68,400	28,861.44	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0557283	1.1141100
1999	72,600	30,469.84	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0552999

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A8—Factors for indexing earnings, 1951–2010—Continued

Year	Annual maximum taxable earnings (dollars)	Average annual wage ^a (dollars)	Factors for workers who were first eligible (attained age 62, became disabled, or died) in ^b —							
			1995	1996	1997	1998	1999	2000	2001	2002
2000	76,200	32,154.82	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2001	80,400	32,921.92	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2002	84,900	33,252.09	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2003	87,000	34,064.95	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2004	87,900	35,648.55	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2005	90,000	36,952.94	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2006	94,200	38,651.41	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2007	97,500	40,405.48	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2008	102,000	41,334.97	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2009	106,800	--	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2010	106,800	--	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A8—Factors for indexing earnings, 1951–2010—Continued

Year	Annual maximum taxable earnings (dollars)	Average annual wage ^a (dollars)	Factors for workers who were first eligible (attained age 62, became disabled, or died) in ^b —							
			2003	2004	2005	2006	2007	2008	2009	2010
1951	3,600	2,799.16	11.7613570	11.8793102	12.1697045	12.7354456	13.2014390	13.8082175	14.4348590	14.7669194
1952	3,600	2,973.32	11.0724443	11.1834885	11.4568731	11.9894764	12.4281746	12.9994114	13.5893479	13.9019581
1953	3,600	3,139.44	10.4865581	10.5917265	10.8506453	11.3550665	11.7705514	12.3115619	12.8702826	13.1663513
1954	3,600	3,155.64	10.4327236	10.5373522	10.7949418	11.2967734	11.7101254	12.2483585	12.8042109	13.0987597
1955	4,200	3,301.44	9.9719880	10.0719959	10.3182096	10.7978791	11.1929764	11.7074398	12.2387443	12.5202851
1956	4,200	3,532.36	9.3200919	9.4135620	9.6436801	10.0919923	10.4612610	10.9420925	11.4386642	11.7017999
1957	4,200	3,641.72	9.0402118	9.1308750	9.3540827	9.7889322	10.1471118	10.6135041	11.0951638	11.5039766
1958	4,200	3,673.80	8.9612717	9.0511432	9.2724019	9.7034542	10.0585062	10.5208258	10.9982797	11.2512848
1959	4,800	3,855.80	8.5382852	8.6239146	8.8347295	9.2454354	9.5837284	10.0242258	10.4791431	10.7202059
1960	4,800	4,007.12	8.2158558	8.2982516	8.5011055	8.8963021	9.2218202	9.6456832	10.0834215	10.3153811
1961	4,800	4,086.76	8.0557508	8.1365409	8.3354418	8.7229370	9.0421116	9.4577147	9.8869226	10.1143620
1962	4,800	4,291.40	7.6716037	7.7485413	7.9379573	8.3069744	8.6109288	9.0067134	9.4154542	9.6320478
1963	4,800	4,396.64	7.4879726	7.5630686	7.7479507	8.1081348	8.4048137	8.7911246	9.1900815	9.4014907
1964	4,800	4,576.32	7.1939724	7.2661199	7.4437430	7.7897852	8.0748156	8.4459588	8.8292515	9.0323601
1965	4,800	4,658.72	7.0667308	7.1376022	7.3120836	7.6520053	7.9319942	8.2965729	8.6730862	8.8726023
1966	6,600	4,938.36	6.6665695	6.7334277	6.8980289	7.2187022	7.4828364	7.8267704	8.1819632	8.3701816
1967	6,600	5,213.44	6.3148171	6.3781476	6.5340639	6.8378173	7.0880148	7.4138016	7.7502532	7.9285405
1968	7,800	5,571.76	5.9087111	5.9679688	6.1138581	6.3980771	6.6321844	6.9370199	7.2518342	7.4186559
1969	7,800	5,893.76	5.5858942	5.6419145	5.7798332	6.0485242	6.2698413	6.5580224	6.8556371	7.0133446
1970	7,800	6,186.24	5.3217981	5.3751697	5.5065678	5.7625553	5.9734087	6.2479648	6.5315086	6.6817598
1971	7,800	6,497.08	5.0671871	5.1180053	5.2431169	5.4868572	5.6876227	5.9490433	6.2190215	6.3620842
1972	9,000	7,133.80	4.6149205	4.6612030	4.7751479	4.9971334	5.1799798	5.4180675	5.6639491	5.7942429
1973	10,800	7,580.16	4.3431695	4.3867267	4.4939619	4.7028757	4.8749551	5.0990230	5.3304257	5.4530472
1974	13,200	8,030.76	4.0994775	4.1405907	4.2418090	4.4390008	4.6014250	4.8129206	5.0313395	5.1470807
1975	14,100	8,630.92	3.8144161	3.8526704	3.9468504	4.1303303	4.2814601	4.4782491	4.6814801	4.7891731
1976	15,300	9,226.48	3.5681994	3.6039844	3.6920852	3.8637216	4.0050962	4.1891827	4.3792952	4.4800368
1977	16,500	9,779.44	3.3664423	3.4002039	3.4833232	3.6452547	3.7786356	3.9523132	4.1316763	4.2267216
1978	17,700	10,556.03	3.1187786	3.1500564	3.2270607	3.3770793	3.5006475	3.6615479	3.8277155	3.9157685
1979	22,900	11,479.46	2.8678980	2.8966598	2.9674697	3.1054205	3.2190486	3.3670059	3.5198067	3.6007765
1980	25,900	12,513.46	2.6309206	2.6573058	2.7222647	2.8488164	2.9530554	3.0887868	3.2289615	3.3032407
1981	29,700	13,773.10	2.3903057	2.4142778	2.4732958	2.5882735	2.6829791	2.8062971	2.9336518	3.0011377
1982	32,400	14,531.34	2.2655805	2.2883017	2.3442401	2.4532184	2.5429823	2.6598655	2.7805750	2.8445395
1983	35,700	15,239.24	2.1603387	2.1820045	2.2353444	2.3392604	2.4248545	2.5363082	2.6514104	2.7124036
1984	37,800	16,135.07	2.0403952	2.0608581	2.1112366	2.2093830	2.2902250	2.3954907	2.5042023	2.5618092
1985	39,600	16,822.51	1.9570159	1.9766426	2.0249624	2.1190982	2.1966365	2.2976007	2.4018699	2.4571226
1986	42,000	17,321.82	1.9006040	1.9196649	1.9665918	2.0580141	2.1333174	2.2313712	2.3326348	2.3862949
1987	43,800	18,426.51	1.7866606	1.8045788	1.8486925	1.9346339	2.0054226	2.0975980	2.1927907	2.2432338
1988	45,000	19,334.04	1.7027957	1.7198728	1.7619158	1.8438231	1.9112891	1.9991378	2.0898622	2.1379375
1989	48,000	20,099.55	1.6379431	1.6543699	1.6948116	1.7735994	1.8384959	1.9229988	2.0102679	2.0565122
1990	51,300	21,027.98	1.5656245	1.5813259	1.6199820	1.6952912	1.7573224	1.8380943	1.9215103	1.9657128
1991	53,400	21,811.60	1.5093767	1.5245140	1.5617813	1.6343849	1.6941875	1.7720575	1.8524767	1.8950911
1992	55,500	22,935.42	1.4354182	1.4498139	1.4852551	1.5543012	1.6111735	1.6852279	1.7617066	1.8022330
1993	57,600	23,132.67	1.4231786	1.4374514	1.4725905	1.5410478	1.5974351	1.6708581	1.7466847	1.7868655
1994	60,600	23,753.53	1.3859801	1.3998799	1.4341005	1.5007685	1.5556820	1.6271859	1.7010305	1.7401611
1995	61,200	24,705.66	1.3325659	1.3459300	1.3788318	1.4429305	1.4957277	1.5644759	1.6354746	1.6730972
1996	62,700	25,913.90	1.2704348	1.2831758	1.3145435	1.3756536	1.4259891	1.4915320	1.5592203	1.5950887
1997	65,400	27,426.00	1.2003909	1.2124294	1.2420677	1.2998086	1.3473689	1.4092981	1.4732546	1.5071454
1998	68,400	28,861.44	1.1406888	1.1521286	1.1802928	1.2351619	1.2803568	1.3392059	1.3999814	1.4321867
1999	72,600	30,469.84	1.0804756	1.0913116	1.1179891	1.1699618	1.2127711	1.2685137	1.3260811	1.3565864

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A8—Factors for indexing earnings, 1951–2010—Continued

Year	Annual maximum taxable earnings (dollars)	Average annual wage ^a (dollars)	Factors for workers who were first eligible (attained age 62, became disabled, or died) in ^b —							
			2003	2004	2005	2006	2007	2008	2009	2010
2000	76,200	32,154.82	1.0238565	1.0341246	1.0594042	1.1086534	1.1492193	1.2020409	1.2565917	1.2854984
2001	80,400	32,921.92	1.0000000	1.0100289	1.0347194	1.0828211	1.1224418	1.1740327	1.2273124	1.2555455
2002	84,900	33,252.09	1.0000000	1.0000000	1.0244454	1.0720695	1.1112968	1.1623754	1.2151260	1.2430789
2003	87,000	34,064.95	1.0000000	1.0000000	1.0000000	1.0464877	1.0847789	1.1346387	1.1861306	1.2134164
2004	87,900	35,648.55	1.0000000	1.0000000	1.0000000	1.0000000	1.0365903	1.0842351	1.1334396	1.1595134
2005	90,000	36,952.94	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0459631	1.0934307	1.1185841
2006	94,200	38,651.41	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0453818	1.0694298
2007	97,500	40,405.48	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0230041
2008	102,000	41,334.97	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2009	106,800	--	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2010	106,800	--	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTE: -- = not available.

- a. National average wage levels. For years before 1978, average wages were determined from wages earned during the first quarter of the year and reported to the Social Security Administration (SSA) for Social Security tax purposes. These wages were then multiplied by 4 to obtain the average wage for the year. For 1973–1977, from data collected on all taxable wages reported to SSA; for 1957–1972, based on 1 percent statistical sample; for 1951–1956, based on 1/10 of 1 percent statistical sample. For 1978–1984, from wage data collected by the Internal Revenue Service during processing of annual tax returns. For years after 1984, from W-2 data processed by SSA. For years after 1977, the average wage amounts have been adjusted to be consistent with the pre-1978 series.
- b. The indexing factor for a given year represents the ratio of the average annual wage for the second year before the year of first eligibility to the average annual wage for the year to be indexed. Multiplying a worker's covered earnings, up to the maximum taxable amounts for various years after 1951, by the indicated factors gives the indexed earnings. Earnings in the year before the year of first eligibility, and any earnings thereafter, are not indexed. The actual taxable earnings for those years are considered in calculating the average indexed monthly earnings (AIME).

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A9—Indexed earnings for workers with maximum earnings, 1951–2010 (in dollars)

Year	Annual maximum taxable earnings	Average annual wage ^a	Annual maximum indexed earnings for workers who were first eligible (attained age 62, became disabled, or died) in ^b —							
			2003	2004	2005	2006	2007	2008	2009	2010
1951	3,600	2,799.16	42,340.89	42,765.52	43,810.94	45,847.60	47,525.18	49,709.58	51,965.49	53,160.91
1952	3,600	2,973.32	39,860.80	40,260.56	41,244.74	43,162.12	44,741.43	46,797.88	48,921.65	50,047.05
1953	3,600	3,139.44	37,751.61	38,130.22	39,062.32	40,878.24	42,373.99	44,321.62	46,333.02	47,398.86
1954	3,600	3,155.64	37,557.81	37,934.47	38,861.79	40,668.38	42,156.45	44,094.09	46,095.16	47,155.53
1955	4,200	3,301.44	41,882.35	42,302.38	43,336.48	45,351.09	47,010.50	49,171.25	51,402.73	52,585.20
1956	4,200	3,532.36	39,144.39	39,536.96	40,503.46	42,386.37	43,937.30	45,956.79	48,042.39	49,147.56
1957	4,200	3,641.72	37,968.89	38,349.67	39,287.15	41,113.52	42,617.87	44,576.72	46,599.69	47,671.67
1958	4,200	3,673.80	37,637.34	38,014.80	38,944.09	40,754.51	42,245.73	44,187.47	46,192.77	47,255.40
1959	4,800	3,855.80	40,983.77	41,394.79	42,406.70	44,378.09	46,001.90	48,116.28	50,299.89	51,456.99
1960	4,800	4,007.12	39,436.11	39,831.61	40,805.31	42,702.25	44,264.74	46,299.28	48,400.42	49,513.83
1961	4,800	4,086.76	38,667.60	39,055.40	40,010.12	41,870.10	43,402.14	45,397.03	47,457.23	48,548.94
1962	4,800	4,291.40	36,823.70	37,193.00	38,102.20	39,873.48	41,332.46	43,232.22	45,194.18	46,233.83
1963	4,800	4,396.64	35,942.27	36,302.73	37,190.16	38,919.05	40,343.11	42,197.40	44,112.39	45,127.16
1964	4,800	4,576.32	34,531.07	34,877.38	35,729.97	37,390.97	38,759.11	40,540.60	42,380.41	43,355.33
1965	4,800	4,658.72	33,920.31	34,260.49	35,098.00	36,729.63	38,073.57	39,823.55	41,630.81	42,588.49
1966	6,600	4,938.36	43,999.36	44,440.62	45,526.99	47,643.43	49,386.72	51,656.68	54,000.96	55,243.20
1967	6,600	5,213.44	41,677.79	42,095.77	43,124.82	45,129.59	46,780.90	48,931.09	51,151.67	52,328.37
1968	7,800	5,571.76	46,087.95	46,550.16	47,688.09	49,905.00	51,731.04	54,108.76	56,564.31	57,865.52
1969	7,800	5,893.76	43,569.98	44,006.93	45,082.70	47,178.49	48,904.76	51,152.57	53,473.97	54,704.09
1970	7,800	6,186.24	41,510.02	41,926.32	42,951.23	44,947.93	46,592.59	48,734.13	50,945.77	52,117.73
1971	7,800	6,497.08	39,524.06	39,920.44	40,896.31	42,797.49	44,363.46	46,402.54	48,508.37	49,624.26
1972	9,000	7,133.80	41,534.28	41,950.83	42,976.33	44,974.20	46,619.82	48,762.61	50,975.54	52,148.19
1973	10,800	7,580.16	46,906.23	47,376.65	48,534.79	50,791.06	52,649.52	55,069.45	57,568.60	58,892.91
1974	13,200	8,030.76	54,113.10	54,655.80	55,991.88	58,594.81	60,738.81	63,530.55	66,413.68	67,941.47
1975	14,100	8,630.92	53,783.27	54,322.65	55,650.59	58,237.66	60,368.59	63,143.31	66,008.87	67,527.34
1976	15,300	9,226.48	54,593.45	55,140.96	56,488.90	59,114.94	61,277.97	64,094.49	67,003.22	68,544.56
1977	16,500	9,779.44	55,546.30	56,103.36	57,474.83	60,146.70	62,347.49	65,213.17	68,172.66	69,740.91
1978	17,700	10,556.03	55,202.38	55,756.00	57,118.98	59,774.30	61,961.46	64,809.40	67,750.56	69,309.10
1979	22,900	11,479.46	65,674.86	66,333.51	67,955.06	71,114.13	73,716.21	77,104.44	80,603.57	82,457.78
1980	25,900	12,513.46	68,140.84	68,824.22	70,506.65	73,784.34	76,484.13	79,999.58	83,630.10	85,553.93
1981	29,700	13,773.10	70,992.08	71,704.05	73,456.88	76,871.72	79,684.48	83,347.02	87,129.46	89,133.79
1982	32,400	14,531.34	73,404.81	74,140.98	75,953.38	79,484.27	82,392.63	86,179.64	90,090.63	92,163.08
1983	35,700	15,239.24	77,124.09	77,897.56	79,801.80	83,511.59	86,567.31	90,546.20	94,655.35	96,832.81
1984	37,800	16,135.07	77,126.94	77,900.44	79,804.74	83,514.68	86,570.50	90,549.55	94,658.85	96,836.39
1985	39,600	16,822.51	77,497.83	78,275.05	80,188.51	83,916.29	86,986.81	90,984.99	95,114.05	97,302.05
1986	42,000	17,321.82	79,825.37	80,625.93	82,596.86	86,436.59	89,599.33	93,717.59	97,970.66	100,224.39
1987	43,800	18,426.51	78,255.74	79,040.55	80,972.73	84,736.96	87,837.51	91,874.79	96,044.23	98,253.64
1988	45,000	19,334.04	76,625.81	77,394.28	79,286.21	82,972.04	86,008.01	89,961.20	94,043.80	96,207.19
1989	48,000	20,099.55	78,621.27	79,409.75	81,350.96	85,132.77	88,247.80	92,303.94	96,492.86	98,712.59
1990	51,300	21,027.98	80,316.54	81,122.02	83,105.08	86,968.44	90,150.64	94,294.24	98,573.48	100,841.07
1991	53,400	21,811.60	80,600.71	81,409.05	83,399.12	87,276.15	90,469.61	94,627.87	98,922.26	101,197.86
1992	55,500	22,935.42	79,665.71	80,464.67	82,431.66	86,263.71	89,420.13	93,530.15	97,774.72	100,023.93
1993	57,600	23,132.67	81,975.09	82,797.20	84,821.21	88,764.35	92,012.26	96,241.43	100,609.04	102,923.45
1994	60,600	23,753.53	83,990.39	84,832.72	86,906.49	90,946.57	94,274.33	98,607.47	103,082.45	105,453.76
1995	61,200	24,705.66	81,553.03	82,370.92	84,384.51	88,307.35	91,538.54	95,745.93	100,091.05	102,393.55
1996	62,700	25,913.90	79,656.26	80,455.12	82,421.88	86,253.48	89,409.52	93,519.05	97,763.11	100,012.06
1997	65,400	27,426.00	78,505.56	79,292.89	81,231.23	85,007.48	88,117.93	92,168.10	96,350.85	98,567.31
1998	68,400	28,861.44	78,023.11	78,805.60	80,732.03	84,485.07	87,576.40	91,601.68	95,758.73	97,961.57
1999	72,600	30,469.84	78,442.53	79,229.22	81,166.01	84,939.23	88,047.18	92,094.10	96,273.49	98,488.17

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A9—Indexed earnings for workers with maximum earnings, 1951–2010 (in dollars)—Continued

Year	Annual maximum taxable earnings	Average annual wage ^a	Annual maximum indexed earnings for workers who were first eligible (attained age 62, became disabled, or died) in ^b —							
			2003	2004	2005	2006	2007	2008	2009	2010
2000	76,200	32,154.82	78,017.86	78,800.29	80,726.60	84,479.39	87,570.51	91,595.52	95,752.29	97,954.98
2001	80,400	32,921.92	80,400.00	81,206.32	83,191.44	87,058.82	90,244.32	94,392.23	98,675.92	100,945.86
2002	84,900	33,252.09	84,900.00	84,900.00	86,975.41	91,018.70	94,349.10	98,685.67	103,164.20	105,537.40
2003	87,000	34,064.95	87,000.00	87,000.00	87,000.00	91,044.43	94,375.77	98,713.57	103,193.36	105,567.23
2004	87,900	35,648.55	87,900.00	87,900.00	87,900.00	87,900.00	91,116.28	95,304.27	99,629.34	101,921.23
2005	90,000	36,952.94	90,000.00	90,000.00	90,000.00	90,000.00	90,000.00	94,136.67	98,408.76	100,672.57
2006	94,200	38,651.41	94,200.00	94,200.00	94,200.00	94,200.00	94,200.00	94,200.00	98,474.97	100,740.29
2007	97,500	40,405.48	97,500.00	97,500.00	97,500.00	97,500.00	97,500.00	97,500.00	97,500.00	99,742.90
2008	102,000	41,334.97	102,000.00	102,000.00	102,000.00	102,000.00	102,000.00	102,000.00	102,000.00	102,000.00
2009	106,800	--	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00
2010	106,800	--	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTE: -- = not available.

- a. National average wage levels. For years before 1978, average wages were determined from wages earned during the first quarter of the year and reported to the Social Security Administration (SSA) for Social Security tax purposes. These wages were then multiplied by 4 to obtain the average wage for the year. For 1973–1977, from data collected on all taxable wages reported to SSA; for 1957–1972, based on 1 percent statistical sample; for 1951–1956, based on 1/10 of 1 percent statistical sample. For 1978–1984, from wage data collected by the Internal Revenue Service during processing of annual tax returns. For years after 1984, from W-2 data processed by SSA. For years after 1977, the average wage amounts have been adjusted to be consistent with the pre-1978 series.
- b. A worker's earnings for each year after 1950 and through the second year before the year of first eligibility are indexed by multiplying covered earnings, up to the maximum taxable amounts, by specified indexing factors (see Table 2.A8). The indexing factor for a given year represents the ratio of the average annual wage for the second year before the year of first eligibility to the average annual wage for the year to be indexed. For example, if the year of first eligibility is 2010, the indexing factor for 1982 is $\$41,334.97/\$14,531.34$, or 2.8445395. Multiplication of maximum taxable earnings of \$32,400 for 1982 by this factor gives maximum indexed earnings of \$92,163.08 for 1982.

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A10—Average monthly wage and average indexed monthly earnings provisions, by year enacted

Year enacted	Provision
Average monthly wage (AMW)	
1939	Computed using creditable earnings after 1936 and before year of death or retirement, divided by months after 1936 and before quarter of death or retirement, excluding months before age 22 in quarters not covered.
1950	Alternatively, computed using creditable earnings after 1950 (or year aged 21, if later) and before year of death, year of retirement, or subsequent year (or year age 65 attained if then insured), divided by number of months in those years.
1954	Earnings and months in 4 years may be excluded in all cases; 5 years if worker has 20 quarters of coverage. Period of disability may be excluded.
1956	Earnings and months in 5 years may be excluded in all cases. Computation period may end at age 62 for women then insured.
1960	Earnings may be used for any year after 1950 and before year of retirement but including year of death, with the number of years equal to the years elapsed after 1955 (or year age 26 attained) and before year of death or age 65 attained (62 for women). Same method may be used for earnings after 1936 and years elapsed after 1941.
1972	Number of years for men reaching age 62 after 1972, measured to age 62 or to 1975, if later.
1977	For workers who attain age 62, become disabled, or die after 1978, excludes earnings in year of attainment of age 62 and later, computed using creditable earnings after 1936. For workers who attain age 62 after 1978 and before 1984, excludes earnings in year of attainment of age 62 and later, computed using creditable earnings after 1950.
Average indexed monthly earnings (AIME)	
1977	For workers who attain age 62, become disabled, or die after 1978, AIME is computed by using indexed earnings after 1950 for the same computation period applicable in calculating the AMW. Indexed earnings for a given year equal actual creditable earnings multiplied by the national average wage for the second year before worker attains age 62, becomes disabled, or dies, divided by the national average wage for the given year, except that for years after the second year before the worker attains age 62, becomes disabled, or dies, indexed earnings equal actual creditable earnings.
1980	For disabled workers, the number of years of earnings used equals the number of years elapsed after 1950 (or year age 21 attained, if later) and before year of disability, minus dropout years equal to one-fifth of the number of elapsed years rounded to the next lower integer (to a maximum of 5 dropout years). However, the number of years of earnings used is at least 2. <i>Effective for initial entitlement after June 1980.</i> Disabled workers with computations using fewer than 3 dropout years under the one-fifth rule may be credited with additional dropout years based on child care, up to a total of 3 dropout years. (To receive this credit, a worker must have had no earnings in that year and have been living with his or her child or spouse's child under age 3.) However, the number of years of earnings used is at least 2. <i>Effective July 1981.</i>
1983	For workers who die after 1978 but before attaining age 62, indexed earnings for a given year equal actual creditable earnings, multiplied by the national average wage for the earlier of (1) the year in which the worker reached or would have reached age 60 or (2) the second year before the survivor becomes eligible for aged or disabled widow(er) benefits, and then divided by the national average wage for the given year. This computation method applies only if it results in a higher benefit. <i>Effective for surviving spouses first eligible after 1984.</i>

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A11—Formulas for computing PIA from AIME, cost-of-living adjustments, and minimum PIA for workers who were first eligible in 1979 or later, by year of first eligibility

Eligibility year	Calculation of PIA (based on percentage of AIME) ^a (dollars)			First applicable cost-of-living adjustment		Minimum PIA based on indexed earnings (dollars)
	90 percent of the first	Plus 32 percent of the next	Plus 15 percent of the amount above	Effective date	Percentage increase	
<i>Enacted in 1977^b</i>						
1979	180	905	1,085	June 1979	9.9	^c 122
1980	194	977	1,171	June 1980	14.3	^c 122
<i>Enacted in 1981</i>						
1981	211	1,063	1,274	June 1981	11.2	^c 122
1982	230	1,158	1,388	June 1982	7.4	^d
<i>Enacted in 1983</i>						
1983	254	1,274	1,528	December 1983	3.5	^d
1984	267	1,345	1,612	December 1984	3.5	^d
1985	280	1,411	1,691	December 1985	3.1	^d
1986	297	1,493	1,790	December 1986	1.3	^d
1987	310	1,556	1,866	December 1987	4.2	^d
1988	319	1,603	1,922	December 1988	4.0	^d
1989	339	1,705	2,044	December 1989	4.7	^d
1990	356	1,789	2,145	December 1990	5.4	^d
1991	370	1,860	2,230	December 1991	3.7	^d
1992	387	1,946	2,333	December 1992	3.0	^d
1993	401	2,019	2,420	December 1993	2.6	^d
1994	422	2,123	2,545	December 1994	2.8	^d
1995	426	2,141	2,567	December 1995	2.6	^d
1996	437	2,198	2,635	December 1996	2.9	^d
1997	455	2,286	2,741	December 1997	2.1	^d
1998	477	2,398	2,875	December 1998	1.3	^d
1999	505	2,538	3,043	December 1999	^e 2.5	^d
2000	531	2,671	3,202	December 2000	3.5	^d

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A11—Formulas for computing PIA from AIME, cost-of-living adjustments, and minimum PIA for workers who were first eligible in 1979 or later, by year of first eligibility—Continued

Eligibility year	Calculation of PIA (based on percentage of AIME) ^a (dollars)			First applicable cost-of-living adjustment		Minimum PIA based on indexed earnings (dollars)
	90 percent of the first	Plus 32 percent of the next	Plus 15 percent of the amount above	Effective date	Percentage increase	
<i>Enacted in 1983 (cont.)</i>						
2001	561	2,820	3,381	December 2001	2.6	d
2002	592	2,975	3,567	December 2002	1.4	d
2003	606	3,047	3,653	December 2003	2.1	d
2004	612	3,077	3,689	December 2004	2.7	d
2005	627	3,152	3,779	December 2005	4.1	d
2006	656	3,299	3,955	December 2006	3.3	d
2007	680	3,420	4,100	December 2007	2.3	d
2008	711	3,577	4,288	December 2008	5.8	d
2009	744	3,739	4,483	December 2009	0.0	d
2010	761	3,825	4,586	December 2010	--	d

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTES: Eligible workers are those who attained age 62, became disabled, or died in the given year.

AIME = average indexed monthly earnings; AMW = average monthly wage; PIA = primary insurance amount; -- = not available.

- For workers who attained age 62 in the 1979–1983 period, the PIA cannot be less than that derived from the PIA table in effect in December 1978 (approximated by the PIA formula in Table 2.A16) on the basis of provisions in effect before 1979 but excluding earnings after year aged 61 in computations of AMW and including any general benefit increase after year aged 61.
- The amendments in 1977 provided for annual automatic adjustments of bend points (AIME brackets) in benefit formula in proportion to increases in average wage level. As a result, separate formulas are applicable to workers who were first eligible in successive calendar years. The legislation also froze the minimum PIA at \$122.
- Not subject to automatic adjustments until earlier of year of attainment of age 65 or year of first receipt of benefits.
- In 1981, legislation eliminated the minimum PIA for workers who attain age 62 or die after 1981 (after 1991 for members of certain religious orders). In August 1981, legislation would have eliminated the minimum PIA effective March 1982 for workers who attained age 62 before November 1981 or who died (before attaining age 62) before March 1982; for all others, the minimum would have been eliminated effective November 1981. This legislation was superseded in December 1981 by legislation that restored the minimum PIA for workers who attained age 62 or died (before attaining age 62) before 1982.
- The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A11.1—Computation of PIA based on Windfall Elimination Provision (WEP), by year enacted

Year effective	Provision																				
	<i>Enacted in 1983</i>																				
1986	Workers first eligible for pensions based on noncovered employment and disability or retired workers after December 31, 1985. ^a The benefit computation formula uses a reduced factor of the usual first AIME bend point.																				
	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><i>Year eligible</i></th> <th style="text-align: center;"><i>Factor (percent)</i></th> </tr> </thead> <tbody> <tr><td>1986</td><td style="text-align: center;">80</td></tr> <tr><td>1987</td><td style="text-align: center;">70</td></tr> <tr><td>1988</td><td style="text-align: center;">60</td></tr> <tr><td>1989</td><td style="text-align: center;">50</td></tr> <tr><td>1990 and later</td><td style="text-align: center;">40</td></tr> </tbody> </table>	<i>Year eligible</i>	<i>Factor (percent)</i>	1986	80	1987	70	1988	60	1989	50	1990 and later	40								
<i>Year eligible</i>	<i>Factor (percent)</i>																				
1986	80																				
1987	70																				
1988	60																				
1989	50																				
1990 and later	40																				
	WEP is not applicable to persons who were federal employees or nonprofit employees on January 1, 1984, and who were covered by Social Security on that date with no Civil Service Retirement System coverage; to persons with Railroad Retirement pensions; or to workers with 30 years of substantial Social Security earnings. Workers with 26–29 years of coverage have less than full WEP applied. ^b For benefits payable before January 1989:																				
	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><i>Years of coverage</i></th> <th style="text-align: center;"><i>Factor (percent)</i></th> </tr> </thead> <tbody> <tr><td>26</td><td style="text-align: center;">50</td></tr> <tr><td>27</td><td style="text-align: center;">60</td></tr> <tr><td>28</td><td style="text-align: center;">70</td></tr> <tr><td>29</td><td style="text-align: center;">80</td></tr> </tbody> </table>	<i>Years of coverage</i>	<i>Factor (percent)</i>	26	50	27	60	28	70	29	80										
<i>Years of coverage</i>	<i>Factor (percent)</i>																				
26	50																				
27	60																				
28	70																				
29	80																				
	<i>Enacted in 1988</i>																				
1989	5 percent added to factor for each year of coverage over 20.																				
	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><i>Years of coverage</i></th> <th style="text-align: center;"><i>Factor (percent)</i></th> </tr> </thead> <tbody> <tr><td>21</td><td style="text-align: center;">45</td></tr> <tr><td>22</td><td style="text-align: center;">50</td></tr> <tr><td>23</td><td style="text-align: center;">55</td></tr> <tr><td>24</td><td style="text-align: center;">60</td></tr> <tr><td>25</td><td style="text-align: center;">65</td></tr> <tr><td>26</td><td style="text-align: center;">70</td></tr> <tr><td>27</td><td style="text-align: center;">75</td></tr> <tr><td>28</td><td style="text-align: center;">80</td></tr> <tr><td>29</td><td style="text-align: center;">85</td></tr> </tbody> </table>	<i>Years of coverage</i>	<i>Factor (percent)</i>	21	45	22	50	23	55	24	60	25	65	26	70	27	75	28	80	29	85
<i>Years of coverage</i>	<i>Factor (percent)</i>																				
21	45																				
22	50																				
23	55																				
24	60																				
25	65																				
26	70																				
27	75																				
28	80																				
29	85																				

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A11.1—Computation of PIA based on Windfall Elimination Provision (WEP), by year enacted—Continued

Year effective	Provision
	<i>Enacted in 1988 (cont.)</i>
1991	Earnings required for a year of substantial coverage (decoupled from the definition of a year of coverage for special minimum PIA). ^b
	<i>Earnings (dollars)</i>
	1991 9,900
	1992 10,350
	1993 10,725
	1994 11,250
	1995 11,325
	1996 11,625
	1997 12,150
	1998 12,675
	1999 13,425
	2000 14,175
	2001 14,925
	2002 15,750
	2003 16,125
	2004 16,275
	2005 16,725
	2006 17,475
	2007 18,150
	2008 18,975
	2009 19,800
	2010 19,800

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

- a. Reduction in PIA will not be greater than one-half the amount of the pension based on noncovered employment performed after 1956.
- b. See Table 2.A12. Before 1991, a year of substantial coverage for WEP was the same amount as for the minimum PIA (25 percent of the "old law" contribution and benefit base). For 1991 and following, a year of substantial coverage under WEP provisions remains 25 percent of the old law base, while the criterion for computing the special minimum PIA was changed to 15 percent of the base.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A12—Special minimum PIA (formula applies to years of coverage), by year enacted

Year enacted	Number of years of coverage	PIA computation			
1972	For 1937–1950, the number (disregarding any remainder and not exceeding 14) obtained by dividing total creditable wages in 1937–1950 by \$900			Maximum amount ^a for workers with 30 or more years of coverage (dollars)	
	After 1950, the number of years with creditable earnings equal to at least 25 percent of the effective annual maximum taxable earnings, that is:	Effective date	Amount ^a per year of coverage over 10 years (dollars)		
	Year	Amount (dollars)	January 1973	8.50	170.00
	1951–1954	900			
	1955–1958	1,050			
	1959–1965	1,200			
	1966–1967	1,650			
	1968–1971	1,950			
	1972	2,250			
	1973	2,700			
	1974	3,300			
	1975	3,525			
	1976	3,825			
	1977	4,125			
	1978	4,425			
1973	...				Maximum amount ^a for workers with 30 or more years of coverage (dollars)
			Effective date	Amount ^a per year of coverage over 10 years (dollars)	
			March 1974	9.00	180.00
1977 ^b	After 1978, the number of years with creditable earnings equal to at least 25 percent of what the annual taxable maximum would have been if the statutory increases in the maximum under the 1977 amendments had not been enacted (the "old law" contribution and benefit base), that is:		Effective date	Amount ^a per year of coverage over 10 years (dollars)	Maximum amount ^a for workers with 30 or more years of coverage (dollars)
	Year	Amount (dollars)	January 1979	11.50	230.00
	1979	4,725	June 1979	^c 12.64	252.80
	1980	5,100	June 1980	^c 14.45	289.00
	1981	^d 5,550	June 1981	^c 16.07	321.40
	1982	6,075	June 1982	^c 17.26	345.10
	1983	6,675	December 1983	^c 17.86	357.10
	1984	7,050	December 1984	^c 18.49	369.50
	1985	7,425	December 1985	^c 19.06	380.90
	1986	7,875	December 1986	^c 19.31	385.80
	1987	8,175	December 1987	^c 20.12	402.00
	1988	8,400	December 1988	^c 20.92	418.00
	1989	8,925	December 1989	^c 21.90	437.60
	1990	9,525	December 1990	^c 23.08	461.20
			December 1991	^c 23.93	478.20
			December 1992	^c 24.65	492.50
			December 1993	^c 25.29	505.30
			December 1994	^c 26.00	519.40
			December 1995	^c 26.68	532.90
			December 1996	^c 27.45	548.30
			December 1997	^c 28.03	559.80
			December 1998	^c 28.39	567.00
			December 1999	^{c,e} 29.10	^e 581.10
			December 2000	^c 30.12	601.40
			December 2001	^c 30.90	617.00
			December 2002	^c 31.33	625.60
			December 2003	^c 31.99	638.70
			December 2004	^c 32.85	655.90

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A12—Special minimum PIA (formula applies to years of coverage), by year enacted—Continued

Year enacted	Number of years of coverage	PIA computation		
		December 2005	^c 34.20	682.70
		December 2006	^c 35.33	705.20
		December 2007	^c 36.14	721.40
		December 2008	^c 38.24	763.20
		December 2009	^c 38.24	763.20
1990	After 1990, the number of years with creditable earnings equal to at least 15 percent of what the annual taxable maximum would have been if the statutory increases in the maximum under the 1977 amendments had not been enacted (the "old law" contribution and benefit base), that is: ^f			
	<i>Year</i>	<i>Amount (dollars)</i>		
	1991	5,940		
	1992	6,210		
	1993	6,435		
	1994	6,750		
	1995	6,795		
	1996	6,975		
	1997	7,290		
	1998	7,605		
	1999	8,055		
	2000	8,505		
	2001	8,955		
	2002	9,450		
	2003	9,675		
	2004	9,765		
	2005	10,035		
	2006	10,485		
	2007	10,890		
	2008	11,385		
	2009	11,880		
	2010	11,880		

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTES: Alternative PIA applicable when it exceeds the regularly computed PIA. The usual rates of actuarial reduction apply for retirement before the full retirement age. No delayed retirement credits are applicable to the benefit derived from the special minimum PIA. However, the resulting retirement benefit will be raised if necessary to equal the benefit derived from the regularly computed PIA plus any delayed retirement credits.

. . . = not applicable.

- The amount effective for a given month applies, as of that month, to all workers from the date of entitlement to benefits.
- Provision for future automatic cost-of-living increases of amount per year of coverage (and maximum amount), beginning with the June 1979 increase.
- Factors were obtained by applying cost-of-living increases to initial 1979 factor of \$11.50 and rounding each one to nearest cent. An approximate PIA may be computed by multiplying factor in year of entitlement by the number of years of coverage in excess of 10 with a maximum of 20. Actual PIAs are published yearly in the *Federal Register*.
- Revised data.
- The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.
- For 1991 and following, a year of substantial coverage under the Windfall Elimination Provision remains 25 percent of the old law base, while the criterion for the special minimum PIA was changed to 15 percent of the base.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A13—Formulas enacted in 1977 for computing OASI maximum family benefit from PIA and cost-of-living adjustments for workers who were first eligible in 1979 or later, by year of first eligibility

Eligibility year	Calculation of maximum family benefit (based on percentage of PIA) (dollars)				First applicable cost-of-living adjustment	
	150 percent of the first	Plus 272 percent of the next	Plus 134 percent of the next	Plus 175 percent of the amount above	Effective date	Percentage increase
1979	230	102	101	433	June 1979	9.9
1980	248	110	109	467	June 1980	14.3
1981	270	120	118	508	June 1981	11.2
1982	294	131	129	554	June 1982	7.4
1983	324	144	142	610	December 1983	3.5
1984	342	151	150	643	December 1984	3.5
1985	358	159	158	675	December 1985	3.1
1986	379	169	166	714	December 1986	1.3
1987	396	175	174	745	December 1987	4.2
1988	407	181	179	767	December 1988	4.0
1989	433	193	190	816	December 1989	4.7
1990	455	201	200	856	December 1990	5.4
1991	473	209	208	890	December 1991	3.7
1992	495	219	217	931	December 1992	3.0
1993	513	227	226	966	December 1993	2.6
1994	539	240	237	1,016	December 1994	2.8
1995	544	241	239	1,024	December 1995	2.6
1996	559	247	246	1,052	December 1996	2.9
1997	581	258	255	1,094	December 1997	2.1
1998	609	271	267	1,147	December 1998	1.3
1999	645	286	283	1,214	December 1999	^a 2.5
2000	679	301	298	1,278	December 2000	3.5
2001	717	317	315	1,349	December 2001	2.6
2002	756	336	332	1,424	December 2002	1.4
2003	774	344	340	1,458	December 2003	2.1
2004	782	347	343	1,472	December 2004	2.7
2005	801	355	352	1,508	December 2005	4.1
2006	838	372	368	1,578	December 2006	3.3
2007	869	386	381	1,636	December 2007	2.3
2008	909	403	399	1,711	December 2008	5.8
2009	950	422	417	1,789	December 2009	0.0
2010	972	431	427	1,830	December 2010	--

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTES: The 1977 amendments provided for annual automatic adjustments of bend points (PIA brackets) in the maximum family benefit formula in proportion to increases in the average wage level. As a result, separate formulas are applicable to workers first eligible in successive calendar years.

Eligible workers are those who attained age 62 or died in the given year.

-- = not available.

- a. The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A14—Formulas for computing maximum family benefit and cost-of-living adjustments for workers first eligible for disability benefits in 1979 or later, by year of enactment

Eligibility year	Formula
<i>Enacted in 1977^a</i>	
1979 ^b	150% of first \$230 of PIA + 272% of next \$102 of PIA + 134% of next \$101 of PIA + 175% of PIA over \$433 ^c
1980 ^b	150% of first \$248 of PIA + 272% of next \$110 of PIA + 134% of next \$109 of PIA + 175% of PIA over \$467 ^c
<i>Enacted in 1980^d</i>	
1979 or later	Smaller of (1) 85% of the AIME (or 100% of PIA, if larger) and (2) 150% of PIA ^e

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

- a. The 1977 amendments provided for annual automatic adjustments of bend points (PIA brackets) in maximum family benefit formula in proportion to increases in average wage level. As a result, separate formulas are applicable to workers first eligible in successive calendar years.
- b. Applicability of formula limited to workers with initial entitlement before July 1980, as a result of 1980 amendments.
- c. Calculated amount subject to cost-of-living adjustments beginning with the one effective for June of the year of first eligibility.
- d. Formula for computing maximum family benefit revised effective for workers with initial entitlement in or after July 1980. New formula remains unchanged for workers eligible in successive calendar years because it has no bend points requiring adjustments.
- e. Calculated amount subject to cost-of-living adjustments beginning with the one effective in year of first eligibility (or in 1981, if later).

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A16—Percentage of average monthly wage (AMW) applicable to primary insurance amount (PIA) based on formula for computing PIA from AMW, and percentage increases in PIA

AMW (dollars)	April 1952	September 1952	September 1954	January 1959	January 1965	February 1968	January 1970	January 1971	September 1972	June 1974	June 1975
First 110	^a 50.00	^a 55.00	55.00	58.85	62.97	71.16	81.83	90.01	108.01	119.89	129.48
Next 290	^b 15.00	^b 15.00	^c 20.00	21.40	22.90	25.88	29.76	32.74	39.29	43.61	47.10
Next 150	...	...	...	...	21.40	24.18	27.81	30.59	36.71	40.75	44.01
Next 100	...	...	...	...	...	28.43	32.69	35.96	43.15	47.90	51.73
Next 100	...	...	...	...	...	...	...	20.00	24.00	26.64	28.77
Next 250	...	...	...	...	...	...	...	...	^d 20.00	22.20	23.98
Next 175	...	...	...	...	...	...	...	...	...	^e 20.00	21.60
Next 100	...	...	...	...	...	...	...	...	...	...	20.00
Percentage increase in PIA	^f 77.0	^g 12.5	^h 13.0	ⁱ 7.0	^j 7.0	13.0	15.0	10.0	20.0	^k 11.0	^l 8.0

(Continued)

Table 2.A16—Percentage of average monthly wage (AMW) applicable to primary insurance amount (PIA) based on formula for computing PIA from AMW, and percentage increases in PIA—Continued

AMW (dollars)	June 1976	June 1977	June 1978	June 1979	June 1980	June 1981	June 1982	Dec. 1983	Dec. 1984	Dec. 1985	Dec. 1986
First 110	137.77	145.90	155.38	170.76	195.18	217.04	233.10	241.26	249.70	257.44	260.79
Next 290	50.10	53.06	56.51	62.10	70.98	78.93	84.77	87.74	90.81	93.62	94.84
Next 150	46.82	49.58	52.81	58.04	66.34	73.77	79.23	82.00	84.87	87.50	88.64
Next 100	55.05	58.30	62.09	68.24	78.00	86.74	93.16	96.42	99.79	102.88	104.22
Next 100	30.61	32.42	34.53	37.95	43.38	48.24	51.81	53.62	55.50	57.22	57.96
Next 250	25.51	27.02	28.78	31.63	36.15	40.20	43.17	44.68	46.24	47.67	48.29
Next 175	22.98	24.34	25.92	28.49	32.56	36.21	38.89	40.25	41.66	42.95	43.51
Next 100	21.28	22.54	24.01	26.39	30.16	33.54	36.02	37.28	38.58	39.78	40.30
Next 100	20.00	21.18	22.56	24.79	28.33	31.50	33.83	35.01	36.24	37.36	37.85
Next 100	...	20.00	21.30	23.41	26.76	29.76	31.96	33.08	34.24	35.30	35.76
Next 435	...	...	20.00	21.98	25.12	27.93	30.00	31.05	32.14	33.14	33.57
Next 250	...	...	...	20.00	22.86	25.42	27.30	28.26	29.25	30.16	30.55
Next 315	...	...	...	...	20.00	22.24	23.89	24.73	25.60	26.39	26.73
Next 225	...	...	...	...	...	20.00	21.48	22.23	23.01	23.72	24.03
Next 275	...	...	...	...	...	...	20.00	20.70	21.42	22.08	22.37
Next 175	...	...	...	...	...	...	...	20.00	20.70	21.34	21.62
Next 150	...	...	...	...	...	...	...	...	20.00	20.63	20.90
Next 200	...	...	...	...	...	...	...	...	...	20.00	20.26
Next 150	...	...	...	...	...	...	...	...	...	...	20.00
Percentage increase in PIA	6.4	5.9	6.5	9.9	14.3	11.2	7.4	3.5	3.5	3.1	1.3

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A16—Percentage of average monthly wage (AMW) applicable to primary insurance amount (PIA) based on formula for computing PIA from AMW, and percentage increases in PIA—Continued

AMW (dollars)	Dec. 1987	Dec. 1988	Dec. 1989	Dec. 1990	Dec. 1991	Dec. 1992	Dec. 1993	Dec. 1994	Dec. 1995	Dec. 1996	Dec. 1997
First 110	271.74	282.61	295.89	311.87	323.41	333.11	341.77	351.34	360.47	370.93	378.72
Next 290	98.82	102.77	107.60	113.42	117.62	121.15	124.30	127.78	131.10	134.90	137.73
Next 150	92.36	96.05	100.56	105.99	109.91	113.21	116.15	119.40	122.50	126.06	128.71
Next 100	108.60	112.94	118.25	124.64	129.25	133.13	136.59	140.41	144.06	148.24	151.35
Next 100	60.39	62.81	65.76	69.31	71.87	74.03	75.95	78.08	80.11	82.43	84.16
Next 250	50.32	52.33	54.79	57.75	59.89	61.69	63.29	65.06	66.75	68.69	70.13
Next 175	45.34	47.15	49.37	52.04	53.97	55.59	57.04	58.64	60.16	61.91	63.21
Next 100	41.99	43.67	45.72	48.19	49.97	51.47	52.81	54.29	55.70	57.32	58.52
Next 100	39.44	41.02	42.95	45.27	46.94	48.35	49.61	51.00	52.33	53.84	54.97
Next 100	37.26	38.75	40.57	42.76	44.34	45.67	46.86	48.17	49.42	50.86	51.93
Next 435	34.98	36.38	38.09	40.15	41.64	42.89	44.01	45.24	46.42	47.76	48.76
Next 250	31.83	33.10	34.66	36.53	37.88	39.02	40.03	41.15	42.22	43.44	44.35
Next 315	27.85	28.96	30.32	31.96	33.14	34.13	35.02	36.00	36.94	38.01	38.81
Next 225	25.04	26.04	27.26	28.73	29.79	30.68	31.48	32.36	33.20	34.16	34.88
Next 275	23.31	24.24	25.38	26.75	27.74	28.57	29.31	30.13	30.91	31.81	32.48
Next 175	22.53	23.43	24.53	25.85	26.81	27.61	28.33	29.12	29.88	30.74	31.39
Next 150	21.78	22.65	23.71	24.99	25.91	26.69	27.38	28.15	28.88	29.72	30.34
Next 200	21.11	21.95	22.98	24.22	25.12	25.87	26.54	27.28	27.99	28.80	29.40
Next 150	20.84	21.67	22.69	23.92	24.81	25.55	26.21	26.94	27.64	28.44	29.04
Next 100	20.00	20.80	21.78	22.96	23.81	24.52	25.16	25.86	26.53	27.30	27.87
Next 250	...	20.00	20.94	22.07	22.89	23.58	24.19	24.87	25.52	26.26	26.81
Next 275	...	...	20.00	21.08	21.86	22.52	23.11	23.76	24.38	25.08	25.61
Next 175	...	...	...	20.00	20.74	21.36	21.92	22.53	23.12	23.79	24.29
Next 175	...	...	...	...	20.00	20.60	21.14	21.73	22.29	22.94	23.42
Next 175	...	...	...	...	...	20.00	20.52	21.09	21.64	22.27	22.74
Next 250	...	...	...	...	...	...	20.00	20.56	21.09	21.71	22.17
Next 50	...	...	...	...	...	...	...	20.00	20.52	21.12	21.56
Next 125	...	...	...	...	...	...	...	...	20.00	20.58	21.01
Next 225	...	...	...	...	...	...	...	...	...	20.00	20.42
Next 250	...	...	...	...	...	...	...	...	...	...	20.00
Percentage increase in PIA	4.2	4.0	4.7	5.4	3.7	3.0	2.6	2.8	2.6	2.9	2.1

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A16—Percentage of average monthly wage (AMW) applicable to primary insurance amount (PIA) based on formula for computing PIA from AMW, and percentage increases in PIA—Continued

AMW (dollars)	Dec. 1998	Dec. 1999	Dec. 2000	Dec. 2001	Dec. 2002	Dec. 2003	Dec. 2004	Dec. 2005	Dec. 2006	Dec. 2007	Dec. 2008	Dec. 2009
First 110	383.64	393.23	407.00	417.58	423.43	432.32	443.99	462.19	477.45	488.43	516.76	516.76
Next 290	139.52	143.01	148.02	151.87	153.99	157.23	161.47	168.09	173.64	177.63	187.93	187.93
Next 150	130.38	133.64	138.32	141.91	143.90	146.92	150.89	157.08	162.26	165.99	175.62	175.62
Next 100	153.32	157.15	162.65	166.88	169.22	172.77	177.44	184.71	190.81	195.20	206.52	206.52
Next 100	85.26	87.39	90.45	92.80	94.10	96.07	98.67	102.71	106.10	108.54	114.84	114.84
Next 250	71.04	72.82	75.37	77.33	78.41	80.06	82.22	85.59	88.41	90.45	95.69	95.69
Next 175	64.03	65.63	67.93	69.70	70.67	72.16	74.10	77.14	79.69	81.52	86.25	86.25
Next 100	59.28	60.77	62.89	64.53	65.43	66.81	68.61	71.42	73.78	75.48	79.85	79.85
Next 100	55.69	57.08	59.08	60.61	61.46	62.75	64.44	67.09	69.30	70.89	75.01	75.01
Next 100	52.60	53.92	55.81	57.26	58.06	59.28	60.88	63.37	65.46	66.97	70.85	70.85
Next 435	49.40	50.63	52.40	53.77	54.52	55.66	57.17	59.51	61.47	62.89	66.54	66.54
Next 250	44.93	46.05	47.66	48.90	49.59	50.63	52.00	54.13	55.91	57.20	60.52	60.52
Next 315	39.31	40.30	41.71	42.79	43.39	44.30	45.50	47.36	48.92	50.05	52.95	52.95
Next 225	35.33	36.21	37.48	38.46	38.99	39.81	40.89	42.56	43.97	44.98	47.59	47.59
Next 275	32.90	33.72	34.90	35.81	36.31	37.07	38.08	39.64	40.94	41.89	44.32	44.32
Next 175	31.79	32.59	33.73	34.61	35.09	35.83	36.79	38.30	39.57	40.48	42.82	42.82
Next 150	30.74	31.51	32.61	33.46	33.93	34.64	35.57	37.03	38.25	39.13	41.40	41.40
Next 200	29.79	30.53	31.60	32.42	32.88	33.57	34.47	35.89	37.07	37.92	40.12	40.12
Next 150	29.41	30.15	31.21	32.02	32.46	33.15	34.04	35.44	36.61	37.45	39.62	39.62
Next 100	28.24	28.94	29.95	30.73	31.16	31.82	32.68	34.02	35.14	35.95	38.03	38.03
Next 250	27.16	27.84	28.81	29.56	29.98	30.61	31.43	32.72	33.80	34.58	36.58	36.58
Next 275	25.94	26.59	27.52	28.23	28.63	29.23	30.02	31.25	32.28	33.02	34.94	34.94
Next 175	24.61	25.22	26.10	26.78	27.16	27.73	28.48	29.64	30.62	31.33	33.14	33.14
Next 175	23.73	24.32	25.17	25.82	26.19	26.74	27.46	28.58	29.53	30.21	31.96	31.96
Next 175	23.03	23.61	24.44	25.07	25.42	25.96	26.66	27.75	28.67	29.32	31.03	31.03
Next 250	22.45	23.02	23.82	24.44	24.78	25.30	25.99	27.05	27.94	28.59	30.24	30.24
Next 50	21.84	22.39	23.17	23.78	24.11	24.62	25.28	26.32	27.18	27.81	29.42	29.42
Next 125	21.29	21.82	22.58	23.17	23.49	23.99	24.63	25.64	26.49	27.10	28.67	28.67
Next 225	20.69	21.20	21.94	22.52	22.83	23.31	23.94	24.92	25.74	26.34	27.86	27.86
Next 250	20.26	20.77	21.49	22.05	22.36	22.83	23.45	24.41	25.21	25.79	27.29	27.29
Next 350	20.00	20.50	21.22	21.77	22.07	22.54	23.15	24.09	24.89	25.46	26.94	26.94
Next 300	...	20.00	20.70	21.24	21.54	21.99	22.58	23.51	24.28	24.84	26.28	26.28
Next 350	...	...	20.00	20.52	20.81	21.24	21.82	22.71	23.46	24.00	25.39	25.39
Next 375	...	...	...	20.00	20.28	20.71	21.26	22.14	22.87	23.39	24.75	24.75
Next 175	...	...	...	...	20.00	20.42	20.97	21.83	22.55	23.07	24.41	24.41
Next 75	...	...	...	...	...	20.00	20.54	21.38	22.09	22.60	23.91	23.91
Next 175	...	...	...	...	...	...	20.00	20.82	21.51	22.00	23.28	23.28
Next 350	...	...	...	...	...	...	...	20.00	20.66	21.14	22.36	22.36
Next 275	...	...	...	...	...	...	...	...	20.00	20.46	21.65	21.65
Next 375	...	...	...	...	...	...	...	...	...	20.00	21.16	21.16
Next 400	...	...	...	...	...	...	...	...	...	...	20.00	20.00
Percentage increase in PIA	1.3	^m 2.5	3.5	2.6	1.4	2.1	2.7	4.1	3.3	2.3	5.8	0.0

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTES: The average monthly wage (AMW) computation is based on earnings after 1950. The amounts shown in the table are percentages of the AMW computed using unrounded data.

... = not applicable.

- a. Applied to first \$100 of AMW.
- b. Applied to next \$200 of AMW.
- c. Applied to next \$190 before 1955 and to next \$240 effective for January 1955.
- d. Applied to next \$150 effective for January 1973 and to next \$350 effective for January 1974.
- e. Applied to next \$100 before January 1975.
- f. Average increase in benefits of about 77 percent—from 100 percent at the lowest level to 50 percent at the highest level.
- g. Increase of 12.5 percent or \$5, if larger.
- h. Average increase of about 13 percent, with minimum increase of \$5.
- i. Increase of 7 percent or \$3, if larger.
- j. Increase of 7 percent or \$4, if larger.
- k. Increase effective in two steps: 7 percent for March–May and 4 percent for June.
- l. Beginning June 1975, all benefit increases are based on automatic cost-of-living adjustments (COLAs).

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A16—Percentage of average monthly wage (AMW) applicable to primary insurance amount (PIA) based on formula for computing PIA from AMW, and percentage increases in PIA—*Continued*

- m. The COLA for December 1999 was originally determined to be 2.4 percent, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A17—Minimum primary insurance amount (PIA) and maximum family benefit for workers who attained age 62, were first eligible for disabled-worker benefits, or died before 1979

Year enacted	Effective date	Minimum PIA ^a (dollars)	Maximum family benefit	
			Percentage of AMW	Not less than—
1935	...	10.00	...	...
1939	...	...	Lesser of 80%, \$85, or 200% of PIA	\$20.00
1950	September 1950	20.00	80% of first \$187.50	\$40.00
1952	September 1952	25.00	80% of first \$210.93	\$45.00
1954	September 1954	30.00	80% of first \$250	\$50.00 or 150% of PIA
1958	January 1959	33.00	80% of first \$317.50	\$20.00 + PIA or 150% of PIA
1961	August 1961	40.00	80% of first \$317.50	150% of PIA
1965	January 1965	44.00	80% of first \$370 + 40% of next \$180	150% of PIA
1967	February 1968	55.00	80% of first \$436 + 40% of next \$214	150% of PIA
1969	January 1970	64.00	80% of first \$436 + 40% of next \$180	150% of PIA
1971	January 1971	70.40	88% of first \$436 + 44% of next \$191 ^b	150% of PIA
1972	September 1972	84.50	105.6% of first \$436 + 52.8% of next \$191 ^b	150% of PIA
1973 ^c	June 1974	89.50	111.8% of first \$436 + 55.9% of next \$191 ^b	150% of PIA
1973 ^d	March 1974	90.50	113.0% of first \$436 + 56.5% of next \$191 ^b	150% of PIA
	June 1974	93.80	117.2% of first \$436 + 58.6% of next \$191 ^b	150% of PIA
	June 1975	101.40	126.6% of first \$436 + 63.3% of next \$191 ^b	150% of PIA
	June 1976	107.90	134.7% of first \$436 + 67.3% of next \$191 ^b	150% of PIA
	June 1977	114.30	142.6% of first \$436 + 71.3% of next \$191 ^b	150% of PIA
	June 1978	121.80	151.9% of first \$436 + 76.0% of next \$191 ^b	150% of PIA
	June 1979	133.90	167.0% of first \$436 + 83.5% of next \$191 ^b	150% of PIA
	June 1980	153.10	190.9% of first \$436 + 95.4% of next \$191 ^b	150% of PIA
	June 1981	170.30	212.2% of first \$436 + 106.1% of next \$191 ^b	150% of PIA

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A17—Minimum primary insurance amount (PIA) and maximum family benefit for workers who attained age 62, were first eligible for disabled-worker benefits, or died before 1979—Continued

Year enacted	Effective date	Minimum PIA ^a (dollars)	Maximum family benefit	
			Percentage of AMW	Not less than—
1981 ^e	March 1982	f	190.9% of first \$436 + 106.1% of next \$191 ^b	150% of PIA
1981	June 1982	182.90	227.9% of first \$436 + 114.0% of next \$191 ^b	150% of PIA
	December 1983	189.30	235.9% of first \$436 + 118.0% of next \$191 ^b	150% of PIA
	December 1984	195.90	244.2% of first \$436 + 122.1% of next \$191 ^b	150% of PIA
	December 1985	201.90	251.8% of first \$436 + 125.9% of next \$191 ^b	150% of PIA
	December 1986	204.50	255.1% of first \$436 + 127.5% of next \$191 ^b	150% of PIA
	December 1987	213.00	265.8% of first \$436 + 132.9% of next \$191 ^b	150% of PIA
	December 1988	221.50	276.4% of first \$436 + 138.2% of next \$191 ^b	150% of PIA
	December 1989	231.90	289.4% of first \$436 + 144.7% of next \$191 ^b	150% of PIA
	December 1990	244.40	305.0% of first \$436 + 152.5% of next \$191 ^b	150% of PIA
	December 1991	253.40	316.3% of first \$436 + 158.1% of next \$191 ^b	150% of PIA
	December 1992	261.00	325.8% of first \$436 + 162.8% of next \$191 ^b	150% of PIA
	December 1993	267.70	334.3% of first \$436 + 167.0% of next \$191 ^b	150% of PIA
	December 1994	275.10	343.7% of first \$436 + 171.7% of next \$191 ^b	150% of PIA
	December 1995	282.20	352.6% of first \$436 + 176.2% of next \$191 ^b	150% of PIA
	December 1996	290.30	362.8% of first \$436 + 181.3% of next \$191 ^b	150% of PIA
	December 1997	296.30	370.4% of first \$436 + 185.1% of next \$191 ^b	150% of PIA
	December 1998	300.10	375.2% of first \$436 + 187.5% of next \$191 ^b	150% of PIA
	December 1999 ^g	307.60	384.6% of first \$436 + 192.2% of next \$191 ^b	150% of PIA
	December 2000	318.30	398.1% of first \$436 + 198.9% of next \$191 ^b	150% of PIA
	December 2001	326.50	408.5% of first \$436 + 204.1% of next \$191 ^b	150% of PIA
December 2002	331.00	414.2% of first \$436 + 206.9% of next \$191 ^b	150% of PIA	
December 2003	337.90	422.9% of first \$436 + 211.2% of next \$191 ^b	150% of PIA	
December 2004	347.00	434.3% of first \$436 + 216.9% of next \$191 ^b	150% of PIA	
December 2005	361.20	452.1% of first \$436 + 225.8% of next \$191 ^b	150% of PIA	
December 2006	373.10	467.0% of first \$436 + 233.3% of next \$191 ^b	150% of PIA	
December 2007	381.60	477.7% of first \$436 + 238.7% of next \$191 ^b	150% of PIA	
December 2008	403.70	505.4% of first \$436 + 252.5% of next \$191 ^b	150% of PIA	
December 2009	403.70	505.4% of first \$436 + 252.5% of next \$191 ^b	150% of PIA	

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTE: AMW = average monthly wage; . . . = not applicable.

- a. Based on earnings; subject to reduction if claimed before age 65.
- b. For AMW of \$628 or more, 175 percent of PIA.
- c. Superseded by legislation in 1973.
- d. Beginning in 1975, minimum PIA and percentages in maximum family benefit formula are subject to automatic cost-of-living increases. (Superseded legislation in 1972 for automatic increases beginning in 1974.)
- e. Superseded by legislation in 1981 that restored the minimum PIA for these groups.
- f. Minimum PIA eliminated by legislation in 1981.
- g. The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A17.1—Full retirement age and maximum reduction of retired-worker benefits, by year of birth

Year of birth ^a	Year of attainment of age 62	Year of attainment of age 65	Full retirement age	Maximum reduction months	Maximum reduction at age 62 ^b
1935	1997	2000	65 years	36	0.2000000
1936	1998	2001	65 years	36	0.2000000
1937	1999	2002	65 years	36	0.2000000
1938	2000	2003	65 years and 2 months	38	0.2083333
1939	2001	2004	65 years and 4 months	40	0.2166667
1940	2002	2005	65 years and 6 months	42	0.2250000
1941	2003	2006	65 years and 8 months	44	0.2333333
1942	2004	2007	65 years and 10 months	46	0.2416667
1943–1954	2005–2016	2008–2019	66 years	48	0.2500000
1955	2017	2020	66 years and 2 months	50	0.2583333
1956	2018	2021	66 years and 4 months	52	0.2666667
1957	2019	2022	66 years and 6 months	54	0.2750000
1958	2020	2023	66 years and 8 months	56	0.2833333
1959	2021	2024	66 years and 10 months	58	0.2916667
1960 or later	2022 and later	2025 and later	67 years	60	0.3000000

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

a. If birthday is January 1, refer to previous year.

b. The monthly reduction factor is 0.0055556 for the first 36 months and 0.0041667 for additional months.

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A17.2—Full retirement age and maximum reduction of widow(er)s' benefits, by year of birth

Year of birth ^a	Year of attainment of age 60	Year of attainment of age 65	Full retirement age	Maximum reduction months	Monthly reduction ^b
1939 or earlier	1999 and earlier	2004 and earlier	65 years	60	0.475
1940	2000	2005	65 years and 2 months	62	0.460
1941	2001	2006	65 years and 4 months	64	0.445
1942	2002	2007	65 years and 6 months	66	0.432
1943	2003	2008	65 years and 8 months	68	0.419
1944	2004	2009	65 years and 10 months	70	0.407
1945–1956	2005–2016	2010–2021	66 years	72	0.396
1957	2017	2022	66 years and 2 months	74	0.385
1958	2018	2023	66 years and 4 months	76	0.375
1959	2019	2024	66 years and 6 months	78	0.365
1960	2020	2025	66 years and 8 months	80	0.356
1961	2021	2026	66 years and 10 months	82	0.348
1962 or later	2022 and later	2027 and later	67 years	84	0.339

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

NOTES: Widows and widowers can elect reduced monthly benefits at age 60 or, if disabled, as early as age 50. Surviving divorced spouses can also receive benefits if married to the worker for at least 10 years and not remarried before age 60 (age 50 if disabled).

a. If birthday is January 1, refer to previous year.

b. Monthly reduction percentages are approximate due to rounding. For survivors whose full retirement age (FRA) is 65, the monthly rate of reduction for the first 60 months immediately preceding FRA is 19/40 of 1 percent of the worker's primary insurance amount (PIA), with a maximum reduction of 28.5 percent at age 60. For survivors whose FRA is older than 65, the amount of reduction for each month prior to FRA is adjusted accordingly to ensure that the maximum reduction at age 60 remains 28.5 percent of the worker's PIA.

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A18—Automatic adjustment provisions

Year enacted	Provision
	<i>Quarter of coverage</i>
1977	Mandatory annual determination, beginning in 1978, as to whether an adjustment is required in the amount of wages and self-employment earnings an individual needs in order to be credited with a quarter of coverage (QC) in the succeeding year. The amount required for a QC is the product of \$250 (in effect in 1978) multiplied by the following quotient: the national average wage for the year before the year of determination, divided by the average wage for 1976 (see Table 2.A8 for average annual wages after 1950). The resulting product, rounded to the nearest multiple of \$10, is the new amount required for a QC. In no case, however, is the new amount reduced below the amount in effect in the year of determination.
	<i>Maximum amount of taxable and creditable earnings</i>
1972	The 1972 Act (as modified by the legislation in 1973) mandated a determination in 1974, and in every subsequent year in which a cost-of-living benefit increase is established, as to whether an adjustment is required in the maximum amount of annual earnings that will be taxed and credited toward benefits. The determination in the years after 1975 is made by multiplying the "maximum" in effect in the year of determination by the following quotient: the national average wage for the year before the year of determination, divided by the average wage for the year before the most recent year in which an automatic determination was made that resulted in an increase or in which an increase in the maximum was enacted. (See Table 2.A8 for annual amounts of the average wage after 1950). The resulting product, rounded to the nearest multiple of \$300, is the new maximum amount of taxable and creditable earnings, effective with respect to remuneration paid after the year of determination and with respect to taxable years beginning after that year. In no case, however, is the maximum reduced to an amount below the maximum in the year of determination.
1976	In the 1974 and 1975 determinations, the quotient was the average wage for the year of determination, estimated from data for the first calendar quarter, divided by the corresponding amount for the year before the year of determination. Public Law (P.L.) 94-202 (signed January 2, 1976) revised the adjustment method by increasing by a year the lag in average wages used in the computation. Thus, for example, the determination in 1976 was based on the percentage increase in the average wage from 1974 to 1975.
1977	Statutory in lieu of automatic increases in the maximum instituted for 1979, 1980, and 1981. Also, for purposes of establishing a "year of coverage" used in the computation of the special minimum primary insurance amount (PIA), annual maximum taxable and creditable earnings after 1978 are the amounts that would have been determined under the automatic adjustment provisions if the statutory increases in the maximum under the 1977 Act had not been enacted (see Table 2.A12).
1989	Automatic increases in the maximum for 1990, 1991, and 1992 determined under a transitional rule, specified by the Omnibus Budget Reconciliation Act of 1989, for computing "deemed" average annual wage for 1988, 1989, and 1990. The purpose of the legislation was to include contributions to certain "deferred compensation" plans, most importantly section 401(k) pension plans, in the average annual average wage.
1994	The determination for years after 1994 is made by multiplying \$60,600, the "maximum" for 1994, by the following quotient: the national average wage index for the year before the year in which the determination is made, divided by the national average wage index for 1992. (See Table 2.A8 for annual amounts of the national average wage index.) The resulting product, rounded to the nearest \$300, is the new maximum amount of taxable and creditable earnings, effective with respect to remuneration paid in (and taxable years beginning in) the year following the year the determination is made. In no case, however, is the new maximum reduced to an amount below the maximum in the year of determination.
	<i>Benefits Computation</i>
1977	New benefit computation method based on average indexed monthly earnings (AIME) after 1950, effective for workers first eligible after 1978. Provision for automatic adjustment of the dollar amounts, or bend points, defining (1) the AIME brackets in the PIA formula (see Table 2.A11) and (2) the PIA brackets in the maximum family benefit formula (see Table 2.A13). New bend points are established by multiplying the bend points in effect in 1979—\$180 and \$1,085 for the PIA formula and \$230, \$332, and \$433 for the maximum family benefit formula—by the following quotient: the national average wage for the second year before the year for which the determination was made, divided by the average wage for 1977 (see Table 2.A8 for average annual wages after 1950). The resulting products, rounded to the nearest dollar, are the new bend points.
1980	Modified maximum family benefit formula applicable to workers with initial entitlement to disability benefits in or after July 1980 (see Table 2.A14). New formula for disabled workers has no bend points subject to automatic adjustment.
	<i>Cost-of-living increase</i>
1972	Under the original provisions (based on 1972 and 1973 legislation), the arithmetical mean of the Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W) for January, February, and March in the year of determination was compared with the arithmetical mean of the CPI for the later of (a) January, February, and March of the year in which the last effective cost-of-living increase was established or (b) the 3 months of the calendar quarter in which the effective month of the last general benefit increase occurred. (Before the introduction, in 1977, of the alternative CPI series for "all urban consumers," or the CPI-U, the CPI-W was referred to as the CPI.) If the percentage increase in the CPI, rounded to the nearest one-tenth of 1 percent, was at least 3.0 (the triggering requirement), a cost-of-living benefit increase was established and the level of benefits was increased by the same percentage, effective for June of the year in which the determination was made.

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A18—Automatic adjustment provisions—Continued

Year enacted	Provision
	Benefits (cont.) <i>Cost-of-living increase (cont.)</i>
1983	<p>The 1983 Act moved the effective date for a cost-of-living benefit increase from June to December, beginning in 1983, and eliminated the "triggering requirement" for the 1983 increase only. Effective with the determination made in 1984, the two periods used in calculating the CPI-W percentage increase were shifted from the first to the third quarter.</p> <p>The 1983 Act also introduced an alternative method for determining the size of a cost-of-living adjustment (COLA). This method, called the stabilizer provision, is applied when the ratio of the combined OASDI trust fund assets to estimated outgo falls below a certain percentage. The "triggering" percentage is 15 percent for 1985–1988 and 20 percent for years after 1988. Under these circumstances, the COLA is based on the lesser of the CPI-W percentage increase determined above or the increase in average wages. The latter increase is the percentage, rounded to the nearest one-tenth of 1 percent by which the national average wage for the year before the year of determination exceeds the average wage for the year before the most recent year in which either a cost-of-living increase or a general benefit increase occurred. (See Table 2.A8 for the annual amount of the average wage after 1950 and footnote a in that table for the underlying data sources.)</p> <p>The 1983 legislation also included a provision for making up any benefit increases that are based on a lower wage increase rather than on the increase in the cost of living. When the fund ratio is greater than 32 percent, additional increases will be provided so that benefits are increased to the level at which they would have been if all increases had been based on the CPI-W. (See Table 2.A19 for the cumulative effect of statutory and automatic increases in benefits.)</p>
1986	Triggering requirement eliminated for cost-of-living increases in and after 1986 by P.L. 99-509 (signed October 21, 1986).
2001	The COLA for December 1999 was originally determined to be 2.4 percent, based on the CPI. The underlying CPI was later recomputed by the Bureau of Labor Statistics (BLS); a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to P.L. 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.
2007	The rules for calculating automatic cost-of-living increases to PIAs under title II of the Social Security Act (the Act) were revised. The arithmetical mean of the CPI for each month is computed for the beginning and ending quarters of the measuring period, and the result is rounded to the same number of decimal places as the published CPI figures. Through December 2006, BLS published CPI figures rounded to the nearest one-tenth of 1 percent. BLS began publishing CPI figures rounded to the nearest one-thousandth of 1 percent in January 2007.
	Earnings test
1972	<p>The 1972 Act (as modified by the 1973 Acts) mandated a determination in 1974, and in every subsequent year in which a cost-of-living increase is established, as to whether an adjustment in the exempt amount—the amount of earnings permitted without reduction in benefits—is required.</p> <p>The determination in the years after 1975 is made by multiplying the monthly exempt amount in effect in the year of determination by the following quotient: the national average wage for the year before the year of determination, divided by the average wage for the year before the most recent year in which an automatic determination was made that resulted in an increase or in which an increase in the exempt amount was enacted. (See Table 2.A8 for annual amounts of the average wage after 1950.) The resulting product, rounded to the nearest multiple of \$10, is the new monthly exempt amount, effective with respect to remuneration paid after the year of determination and with respect to taxable year beginning after that year. In no case, however, is the new exempt amount reduced below the exempt amount in the year of determination. The new annual exempt amount is determined by multiplying the new monthly amount by 12.</p>
1976	In the 1974 and 1975 determinations, the quotient was the average wage for the year of determination, estimated from data for the first calendar quarter, divided by the corresponding amount for the year before the year of determination. P.L. 94-202 (signed January 2, 1976) revised the adjustment method by increasing by a year the lag in average wages used in the computation. Thus, for example, the 1976 determination was based on the percentage increase in the average wage from 1974 to 1975.
1994	The determination for years after 1994 is made by multiplying the monthly exempt amounts in effect for 1994 (\$930 for beneficiaries who have, \$670 for beneficiaries who have not yet, reached "full retirement age"; see footnote f in Table 2.A29) by the following quotient: the national average wage for the year before the year in which the determination is made, divided by the national average wage for 1992. (See Table 2.A8 for annual amounts of the national average wage.) The resulting products, rounded to the nearest \$10, are the new monthly exempt amounts effective for the year following the year the determination is made. The new annual exempt amounts are determined by multiplying the new monthly amounts by 12.
1996	P.L. 104-121, enacted March 29, 1996, suspended the automatic indexing of the exempt amounts through the year 2002 for workers aged 65–69. It legislated ad hoc increases in the annual exempt amounts to \$12,500 in 1996; \$13,500 in 1997; \$14,500 in 1998; \$15,500 in 1999; \$17,000 in 2000; \$25,000 in 2001; and \$30,000 in 2002. Thereafter, the exempt amounts will increase automatically based on the annual increase in the national average wage as under the 1994 legislation.
2000	P.L. 106-182, enacted April 7, 2000, eliminated the earnings test beginning with the month a beneficiary reaches full retirement age (FRA). The annual earnings test that applies in the year of attainment of FRA is based on the annual limits established under P.L. 104-121 (including the \$1 for \$3 withholding rate). In determining annual earnings for purposes of the annual earnings test under this legislation, only earnings before the month of attainment of FRA will be considered. P.L. 106-182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year, which continues to be pegged to increases in the average wage.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A19—Illustrative benefit growth: Cumulative effect of statutory and automatic increases in benefits using a 100 dollar base benefit

Base date	Aug. 1950	Sept. 1950	Sep. 1952	Sept. 1954	Jan. 1959	Jan. 1965	Feb. 1968	Jan. 1970	Jan. 1971	Sept. 1972	June 1974	June 1975	June 1976	June 1977	June 1978
August 1950	100	177	199	225	241	258	291	335	368	442	491	530	564	597	636
September 1950	...	100	113	127	136	146	164	189	208	250	277	299	318	337	359
September 1952	100	113	121	129	146	168	185	222	246	266	283	300	319
September 1954	100	107	114	129	149	164	196	218	235	250	265	283
January 1959	100	107	121	139	153	184	204	220	234	248	264
January 1965	100	113	130	143	172	190	206	219	232	247
February 1968	100	115	127	152	168	182	194	205	218
January 1970	100	110	132	147	158	168	178	190
January 1971	100	120	133	144	153	162	173
September 1972	100	111	120	128	135	144
June 1974	100	108	115	122	130
June 1975	100	106	113	120
June 1976	100	106	113
June 1977	100	107
June 1978	100
Cost-of-living adjustment	...	^a 77.0	12.5	13.0	7.0	7.0	13.0	15.0	10.0	20.0	11.0	8.0	6.4	5.9	6.5

(Continued)

Table 2.A19—Illustrative benefit growth: Cumulative effect of statutory and automatic increases in benefits using a 100 dollar base benefit—Continued

Base date	June 1979	June 1980	June 1981	June 1982	Dec. 1983	Dec. 1984	Dec. 1985	Dec. 1986	Dec. 1987	Dec. 1988	Dec. 1989	Dec. 1990	Dec. 1991	Dec. 1992	Dec. 1993
August 1950	699	799	888	954	987	1,022	1,053	1,067	1,112	1,156	1,211	1,276	1,323	1,363	1,398
September 1950	395	451	502	539	558	577	595	603	628	653	684	721	748	770	790
September 1952	351	401	446	479	496	513	529	536	558	581	608	641	665	684	702
September 1954	310	355	395	424	439	454	468	474	494	514	538	567	588	606	621
January 1959	290	332	369	396	410	424	437	443	462	480	503	530	550	566	581
January 1965	271	310	345	370	383	397	409	414	432	449	470	495	514	529	543
February 1968	240	274	305	328	339	351	362	367	382	397	416	438	455	468	480
January 1970	209	239	265	285	295	305	315	319	332	345	362	381	395	407	418
January 1971	190	217	241	259	268	277	286	290	302	314	329	347	359	370	380
September 1972	158	181	201	216	223	231	238	241	252	262	274	289	299	308	316
June 1974	142	163	181	194	201	208	215	218	227	236	247	260	270	278	285
June 1975	132	151	168	180	186	193	199	201	210	218	229	241	250	257	264
June 1976	124	142	158	169	175	181	187	189	197	205	215	226	235	242	248
June 1977	117	134	149	160	165	171	176	179	186	194	203	214	222	228	234
June 1978	110	126	140	150	155	161	166	168	175	182	190	201	208	214	220
June 1979	100	114	127	137	141	146	151	153	159	166	173	183	189	195	200
June 1980	...	100	111	119	124	128	132	134	139	145	152	160	166	171	175
June 1981	...	...	100	107	111	115	119	120	125	130	136	144	149	153	157
June 1982	...	...	...	100	104	107	110	112	117	121	127	134	139	143	147
December 1983	...	...	...	...	100	104	107	108	113	117	123	129	134	138	142
December 1984	...	...	...	...	...	100	103	104	109	113	118	125	130	133	137
December 1985	...	...	...	...	...	...	100	101	106	110	115	121	126	129	133
December 1986	...	...	...	...	...	...	...	100	104	108	113	120	124	128	131
December 1987	...	...	...	...	...	...	...	...	100	104	109	115	119	123	126
December 1988	...	...	...	...	...	...	...	...	...	100	105	110	114	118	121
December 1989	...	...	...	...	...	...	...	...	...	...	100	105	109	113	116
December 1990	...	...	...	...	...	...	...	...	...	...	...	100	104	107	110
December 1991	...	...	...	...	...	...	...	...	...	...	...	...	100	103	106
December 1992	...	...	...	...	...	...	...	...	...	...	...	...	...	100	103
December 1993	...	...	...	...	...	...	...	...	...	...	...	...	...	...	100
Cost-of-living adjustment	9.9	14.3	11.2	7.4	3.5	3.5	3.1	1.3	4.2	4.0	4.7	5.4	3.7	3.0	2.6

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A19—Illustrative benefit growth: Cumulative effect of statutory and automatic increases in benefits using a 100 dollar base benefit—Continued

Base date	Dec. 1994	Dec. 1995	Dec. 1996	Dec. 1997	Dec. 1998	Dec. 1999	Dec. 2000	Dec. 2001	Dec. 2002	Dec. 2003	Dec. 2004	Dec. 2005	Dec. 2006	Dec. 2007	Dec. 2008	Dec. 2009
August 1950	1,437	1,475	1,518	1,549	1,570	1,609	1,665	1,708	1,732	1,769	1,817	1,890	1,953	1,997	2,112	2,112
September 1950	812	833	857	875	887	909	941	965	979	999	1,026	1,067	1,102	1,127	1,192	1,192
September 1952	722	741	762	778	788	808	836	858	870	888	912	949	981	1,003	1,061	1,061
September 1954	639	655	674	689	698	715	740	759	770	786	807	839	867	886	937	937
January 1959	597	613	630	644	652	668	692	710	720	735	754	785	811	829	877	877
January 1965	558	573	589	601	609	625	646	663	672	687	705	733	758	775	819	819
February 1968	494	507	521	532	539	553	572	587	595	608	624	649	670	685	724	724
January 1970	429	441	453	463	469	481	497	510	517	528	543	563	582	595	629	629
January 1971	390	401	412	421	426	437	452	464	470	480	493	512	529	541	572	572
September 1972	325	334	343	351	355	364	377	387	392	400	411	428	442	451	477	477
June 1974	293	301	309	316	320	328	339	348	353	361	370	385	398	406	429	429
June 1975	271	278	286	292	296	304	314	323	327	334	343	356	368	376	397	397
June 1976	255	262	269	275	278	285	295	303	307	314	322	335	346	353	373	373
June 1977	241	247	254	260	263	270	279	286	290	296	304	316	327	334	353	353
June 1978	226	232	239	244	247	253	262	269	273	278	286	296	306	312	330	330
June 1979	206	211	217	222	225	230	238	245	248	253	260	269	278	284	300	300
June 1980	180	185	190	194	197	201	209	214	217	222	227	235	243	248	262	262
June 1981	162	166	171	174	177	181	188	192	195	199	205	213	220	224	236	236
June 1982	151	155	159	162	165	169	175	179	182	185	190	197	203	207	219	219
December 1983	146	149	154	157	159	163	169	173	176	179	184	190	197	201	212	212
December 1984	141	144	149	152	154	157	163	167	170	173	178	184	190	194	205	205
December 1985	136	140	144	147	149	153	158	162	164	168	172	179	184	188	198	198
December 1986	135	138	142	145	147	151	156	160	162	166	170	176	182	186	196	196
December 1987	129	133	137	139	141	145	150	154	156	159	163	169	174	178	188	188
December 1988	124	128	131	134	136	139	144	148	150	153	157	163	168	171	180	180
December 1989	119	122	125	128	130	133	138	141	143	146	150	156	161	164	173	173
December 1990	113	116	119	121	123	126	131	134	136	139	142	148	152	155	163	163
December 1991	109	111	115	117	119	122	126	129	131	134	137	142	147	150	158	158
December 1992	105	108	111	114	115	118	122	125	127	130	133	138	142	145	153	153
December 1993	103	105	109	111	112	115	119	122	124	126	130	135	139	142	150	150
December 1994	100	103	106	108	109	112	116	119	121	123	126	131	136	138	146	146
December 1995	...	100	103	105	106	109	113	116	117	120	123	127	131	134	141	141
December 1996	...	...	100	102	103	106	110	113	114	117	120	124	128	131	138	138
December 1997	...	...	...	100	101	104	107	110	112	114	117	122	126	128	135	135
December 1998	...	...	...	...	100	103	106	109	110	113	116	120	124	126	133	133
December 1999	...	...	...	...	...	100	104	106	108	110	113	116	120	123	130	130
December 2000	...	...	...	...	...	...	100	103	104	106	109	113	117	119	125	125
December 2001	...	...	...	...	...	...	...	100	101	104	106	110	114	116	122	122
December 2002	...	...	...	...	...	...	...	...	100	102	105	109	113	115	121	121
December 2003	...	...	...	...	...	...	...	...	...	100	103	107	110	112	118	118
December 2004	...	...	...	...	...	...	...	...	...	...	100	104	108	110	116	116
December 2005	...	...	...	...	...	...	...	...	...	...	...	100	103	105	111	111
December 2006	...	...	...	...	...	...	...	...	...	...	...	...	100	102	107	107
December 2007	...	...	...	...	...	...	...	...	...	...	...	...	...	100	105	105
December 2008	...	...	...	...	...	...	...	...	...	...	...	...	...	...	100	100
December 2009	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	100
Cost-of-living adjustment	2.8	2.6	2.9	2.1	1.3	^b 2.5	3.5	2.6	1.4	2.1	2.7	4.1	3.3	2.3	5.8	0.0

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTES: Growth reflects cost-of-living adjustments only. The amounts shown in the are computed using unrounded data, with results rounded to the nearest dollar.

... = not applicable.

- Average increase in benefits of about 77 percent—from 100 percent at the lowest level to 50 percent at the highest level.
- The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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Table 2.A20—Monthly benefits for retired and disabled workers

Year enacted	Age	Percentage of PIA	Condition or qualification																																	
Retired worker																																				
1935	65 or older	100	Fully insured. Amount based on cumulative wages.																																	
1939	Amount based on PIA.																																	
1956	Women: 62–64	...	Reduced 5/9 of 1 percent for each month under age 65.																																	
1961	Men: 62–64	...	Reduced 5/9 of 1 percent for each month under age 65.																																	
1972	Increased 1/12 of 1 percent for each month between ages 65 and 72 for which no benefits received after 1970 (PIA based on AMW only). Applicable only to worker whose benefit has not been actuarially reduced.																																	
1977	Increased 1/4 of 1 percent for each month after 1981 and between ages 65 and 72 in which no benefits received. Requirement for nonreceipt of actuarially reduced benefit removed.																																	
1983	65 and 2 months–67	...	Beginning in 2000, the age at which 100 percent of PIA is payable will be gradually increased, as follows: <table style="margin-left: 40px; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><i>Applicable PIA payable at age—</i></th> <th style="text-align: left;"><i>Applicable to workers who attain age 62 in—</i></th> </tr> </thead> <tbody> <tr><td>65 and 2 months</td><td>2000</td></tr> <tr><td>65 and 4 months</td><td>2001</td></tr> <tr><td>65 and 6 months</td><td>2002</td></tr> <tr><td>65 and 8 months</td><td>2003</td></tr> <tr><td>65 and 10 months</td><td>2004</td></tr> <tr><td>66</td><td>2005–2016</td></tr> <tr><td>66 and 2 months</td><td>2017</td></tr> <tr><td>66 and 4 months</td><td>2018</td></tr> <tr><td>66 and 6 months</td><td>2019</td></tr> <tr><td>66 and 8 months</td><td>2020</td></tr> <tr><td>66 and 10 months</td><td>2021</td></tr> <tr><td>67</td><td>2022 and later</td></tr> </tbody> </table>	<i>Applicable PIA payable at age—</i>	<i>Applicable to workers who attain age 62 in—</i>	65 and 2 months	2000	65 and 4 months	2001	65 and 6 months	2002	65 and 8 months	2003	65 and 10 months	2004	66	2005–2016	66 and 2 months	2017	66 and 4 months	2018	66 and 6 months	2019	66 and 8 months	2020	66 and 10 months	2021	67	2022 and later							
<i>Applicable PIA payable at age—</i>	<i>Applicable to workers who attain age 62 in—</i>																																			
65 and 2 months	2000																																			
65 and 4 months	2001																																			
65 and 6 months	2002																																			
65 and 8 months	2003																																			
65 and 10 months	2004																																			
66	2005–2016																																			
66 and 2 months	2017																																			
66 and 4 months	2018																																			
66 and 6 months	2019																																			
66 and 8 months	2020																																			
66 and 10 months	2021																																			
67	2022 and later																																			
	62–66	...	Reduced 5/9 of 1 percent for each of the first 36 months of receipt of benefits immediately preceding the age at which 100 percent of PIA is payable, plus 5/12 of 1 percent for each of up to 24 earlier months of benefit receipt.																																	
	Increased by the following percentage for each month between the age at which 100 percent of PIA is payable and age 70 in which no benefits are received: <table style="margin-left: 40px; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><i>Age 62 in years—</i></th> <th style="text-align: left;"><i>Rate of increase</i></th> <th style="text-align: left;"><i>Annual rate (percent)</i></th> </tr> </thead> <tbody> <tr><td>1987–1988</td><td>7/24 of 1 percent</td><td>3.5</td></tr> <tr><td>1989–1990</td><td>8/24 of 1 percent</td><td>4</td></tr> <tr><td>1991–1992</td><td>9/24 of 1 percent</td><td>4.5</td></tr> <tr><td>1993–1994</td><td>10/24 of 1 percent</td><td>5</td></tr> <tr><td>1995–1996</td><td>11/24 of 1 percent</td><td>5.5</td></tr> <tr><td>1997–1998</td><td>12/24 of 1 percent</td><td>6</td></tr> <tr><td>1999–2000</td><td>13/24 of 1 percent</td><td>6.5</td></tr> <tr><td>2001–2002</td><td>14/24 of 1 percent</td><td>7</td></tr> <tr><td>2003–2004</td><td>15/24 of 1 percent</td><td>7.5</td></tr> <tr><td>2005 and later</td><td>16/24 of 1 percent</td><td>8</td></tr> </tbody> </table>	<i>Age 62 in years—</i>	<i>Rate of increase</i>	<i>Annual rate (percent)</i>	1987–1988	7/24 of 1 percent	3.5	1989–1990	8/24 of 1 percent	4	1991–1992	9/24 of 1 percent	4.5	1993–1994	10/24 of 1 percent	5	1995–1996	11/24 of 1 percent	5.5	1997–1998	12/24 of 1 percent	6	1999–2000	13/24 of 1 percent	6.5	2001–2002	14/24 of 1 percent	7	2003–2004	15/24 of 1 percent	7.5	2005 and later	16/24 of 1 percent	8
<i>Age 62 in years—</i>	<i>Rate of increase</i>	<i>Annual rate (percent)</i>																																		
1987–1988	7/24 of 1 percent	3.5																																		
1989–1990	8/24 of 1 percent	4																																		
1991–1992	9/24 of 1 percent	4.5																																		
1993–1994	10/24 of 1 percent	5																																		
1995–1996	11/24 of 1 percent	5.5																																		
1997–1998	12/24 of 1 percent	6																																		
1999–2000	13/24 of 1 percent	6.5																																		
2001–2002	14/24 of 1 percent	7																																		
2003–2004	15/24 of 1 percent	7.5																																		
2005 and later	16/24 of 1 percent	8																																		
	No further increases for months of nonreceipt of benefits after age 70, effective 1984.																																	
	Partial offset for receipt of pension based on noncovered employment, phased in over a 5-year period beginning in 1986 for individuals first eligible for Social Security and noncovered pension after 1985 (see Table 2.A11).																																	

(Continued)

2.A OASDI: Benefit Types and Levels

Table 2.A20—Monthly benefits for retired and disabled workers—Continued

Year enacted	Age	Percentage of PIA	Condition or qualification
<i>Disabled worker</i>			
1956	50–64	...	Disability insured. Waiting period of 6 calendar months. Reduced by amount of workers' compensation.
1958	...	...	Reduction for workers' compensation eliminated.
1960	Under 50	...	...
1965	...	...	Reduced if benefits plus workers' compensation exceed 80 percent of the higher of AMW or high 5-year average taxable earnings in covered employment. Adjusted periodically for rises in wage levels.
1967	...	...	Reduced if benefits plus workers' compensation exceed 80 percent of the higher of AMW or high 5-year average earnings in covered employment, regardless of taxable limit.
1972	...	...	Reduced if benefits plus workers' compensation exceed 80 percent of the highest of (a) AMW, (b) high 5-year average earnings or (c) highest annual earnings in the period consisting of year of disability onset and 5 preceding years in covered employment.
	...	...	Waiting period reduced to 5 full calendar months.
1983	...	...	Partial offset for receipt of pension based on noncovered employment phased in over a 5-year period beginning in 1986 for individuals first eligible for Social Security and noncovered pension after 1985.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

NOTE: PIA = primary insurance amount; AMW = average monthly wage; ... = not applicable.

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Table 2.A21—Monthly benefits for spouses and children of retired and disabled workers

Year enacted	Age	Percentage of PIA	Condition or qualification
<i>Wife</i>			
1939	65 or older	50	Fully insured.
1956	62–64	...	Reduced 25/36 of 1 percent for each month under age 65.
1967	...	...	Maximum \$105.
1969	...	...	Maximum eliminated.
1977	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	65 and 2 months–67	...	Beginning in 2000, the age at which 50 percent of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1 percent for each of the first 36 months under the age at which 50 percent of PIA is payable, plus 5/12 of 1 percent for each of up to 24 earlier months of benefit receipt.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
<i>Divorced wife</i>			
1965	65 or older	...	Fully insured. Dependent. Married 20 years. Not counted toward family maximum.
	62–64	...	Reduced 25/36 of 1 percent for each month under age 65.
1967	...	...	Maximum \$105.
1969	...	...	Maximum eliminated.
1972	...	...	Dependency requirement eliminated.
1977	...	...	Married 10 years.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and married 20 years.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	...	...	Can be independently entitled to benefits if divorced for 2 years or more (after marriage of 10 or more years) and worker could be entitled to benefits if he applied. Effective with benefits for months after December 1984.
	65 and 2 months–67	...	Beginning in 2000, the age at which 50 percent of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1 percent for each of the first 36 months under the age at which 50 percent of PIA is payable, plus 5/12 of 1 percent for each of up to 24 earlier months of benefit receipt.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
<i>Wife (mother)</i>			
1950	Under 65	...	Fully insured. Caring for eligible child.
1965	...	...	Eligible child excludes student aged 18–21.
1967	...	...	Maximum \$105.
1969	...	...	Maximum eliminated.
1977	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.
1981	...	...	Eligible child excludes nondisabled child aged 16–17.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.

(Continued)

2.A OASDI: Benefit Types and Levels

Table 2.A21—Monthly benefits for spouses and children of retired and disabled workers—Continued

Year enacted	Age	Percentage of PIA	Condition or qualification
Child			
1939	Under 18	...	Fully insured. ^a
1965	18–21	...	Full-time student.
1972	...	...	Benefits extended to end of quarter or semester in which 22nd birthday occurs while undergraduate student.
	...	...	Includes grandchild under certain circumstances.
1981	18–22	...	Student benefits eliminated (to be phased out gradually for those entitled before May 1982), except for elementary or secondary school students under age 19.
1996	...	...	Stepchildren must be dependent on worker.
Disabled child			
1956	18 or older	...	Fully insured. ^a Disabled before age 18.
1972	...	...	Disabled before age 22.
	...	...	Includes grandchild under certain circumstances.
Husband			
1950	65 or older	50	Fully and currently insured. Dependent.
1961	62–64	...	Reduced 25/36 of 1 percent for each month under age 65.
1967	...	...	Currently insured requirement eliminated. Maximum \$105.
1969	...	...	Maximum eliminated.
1977	...	...	Dependency requirement eliminated.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and dependent.
1983	...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	65 and 2 months–67	...	Beginning in 2000, the age at which 50 percent of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1 percent for each of the first 36 months under the age at which 50 percent of PIA is payable, plus 5/12 of 1 percent for each of up to 24 earlier months of benefit receipt.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Divorced husband			
1977 ^b	65 or older	...	Fully insured. Married 10 years. Not counted toward family maximum.
	62–64	...	Reduced 25/36 of 1 percent for each month under age 65.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset).
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible after June 1983.
	...	...	Can be independently entitled to benefits if divorced for 2 years or more (after marriage of 10 or more years) and worker could be entitled to benefits if she applied. Effective with benefits for months after December 1984.
	65 and 2 months–67	...	Beginning in 2000, the age at which 50 percent of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1 percent for each of the first 36 months under the age at which 50 percent of PIA is payable, plus 5/12 of 1 percent for each of up to 24 earlier months of benefit receipt.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.

(Continued)

Table 2.A21—Monthly benefits for spouses and children of retired and disabled workers—Continued

Year enacted	Age	Percentage of PIA	Condition or qualification
<i>Husband (father)</i>			
1978 ^c	Under 65	...	Fully insured. Caring for eligible child. Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset).
1981	...	...	Eligible child excludes nondisabled child aged 16–17.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

NOTE: PIA = primary insurance amount; ... = not applicable.

- a. Under the Act of 1939, generally not available to child of married female worker. Under the Act of 1950, available if female worker is fully and currently insured. Currently insured requirement eliminated by the Act of 1967.
- b. Northern District of California District Court decision in *Oliver v. Califano*, June 24, 1977. Statutory change enacted in 1983.
- c. Eastern District of Pennsylvania District Court decision in *Cooper v. Califano*, December 29, 1978. Statutory change enacted in 1983.

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2.A OASDI: Benefit Types and Levels

Table 2.A22—Monthly benefits for survivors of deceased workers

Year enacted	Age	Percentage of PIA	Condition or qualification																										
Widow																													
1939	65 or older	75	Fully insured.																										
1956	62–64																										
1961	...	82.5	...																										
1965	60–61	...	Reduced 5/9 of 1 percent for each month under age 62.																										
1972	65 or older	100	Limited, if husband retired before age 65, to amount husband would be receiving if still living, but not less than 82 1/2 percent of PIA.																										
	60–64	...	Reduced 19/40 of 1 percent each month under age 65. In addition, for a widow aged 62–64 whose husband retired before age 65 limited to amount he would be receiving if still living, but not less than 82 1/2 percent of PIA.																										
1977	Increased by any delayed retirement credit husband would be receiving.																										
	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.																										
1983	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.																										
	65 and 2 months–67	...	Beginning in 2000, the age at which 100 percent of PIA is payable will be gradually increased, as follows: <table style="margin-left: 40px; border: none;"> <tr> <td style="text-align: center;"><i>Applicable PIA payable at age—</i></td> <td style="text-align: center;"><i>Applicable to widows who attain age 60 in—</i></td> </tr> <tr> <td style="text-align: center;">65 and 2 months</td> <td style="text-align: center;">2000</td> </tr> <tr> <td style="text-align: center;">65 and 4 months</td> <td style="text-align: center;">2001</td> </tr> <tr> <td style="text-align: center;">65 and 6 months</td> <td style="text-align: center;">2002</td> </tr> <tr> <td style="text-align: center;">65 and 8 months</td> <td style="text-align: center;">2003</td> </tr> <tr> <td style="text-align: center;">65 and 10 months</td> <td style="text-align: center;">2004</td> </tr> <tr> <td style="text-align: center;">66</td> <td style="text-align: center;">2005–2016</td> </tr> <tr> <td style="text-align: center;">66 and 2 months</td> <td style="text-align: center;">2017</td> </tr> <tr> <td style="text-align: center;">66 and 4 months</td> <td style="text-align: center;">2018</td> </tr> <tr> <td style="text-align: center;">66 and 6 months</td> <td style="text-align: center;">2019</td> </tr> <tr> <td style="text-align: center;">66 and 8 months</td> <td style="text-align: center;">2020</td> </tr> <tr> <td style="text-align: center;">66 and 10 months</td> <td style="text-align: center;">2021</td> </tr> <tr> <td style="text-align: center;">67</td> <td style="text-align: center;">2022 and later</td> </tr> </table>	<i>Applicable PIA payable at age—</i>	<i>Applicable to widows who attain age 60 in—</i>	65 and 2 months	2000	65 and 4 months	2001	65 and 6 months	2002	65 and 8 months	2003	65 and 10 months	2004	66	2005–2016	66 and 2 months	2017	66 and 4 months	2018	66 and 6 months	2019	66 and 8 months	2020	66 and 10 months	2021	67	2022 and later
<i>Applicable PIA payable at age—</i>	<i>Applicable to widows who attain age 60 in—</i>																												
65 and 2 months	2000																												
65 and 4 months	2001																												
65 and 6 months	2002																												
65 and 8 months	2003																												
65 and 10 months	2004																												
66	2005–2016																												
66 and 2 months	2017																												
66 and 4 months	2018																												
66 and 6 months	2019																												
66 and 8 months	2020																												
66 and 10 months	2021																												
67	2022 and later																												
	60–66	...	The percent of reduction for each month depends on the age at which 100 percent of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2 percent at age 60.																										
1984	Noncovered pension offset limited to two-thirds of such pension.																										
Disabled widow																													
1967	50–59	82.5	Fully insured. Reduced 13 1/3 percent, plus 43/198 of 1 percent for each month under age 60. Includes divorced wife, dependent and married 20 years.																										
1972	...	100	Reduced 28 1/2 percent, plus 43/240 of 1 percent for each month under age 60.																										
1977	Increased by any delayed retirement credit husband would be receiving.																										
	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.																										
1983	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.																										
	Additional reduction for each month under age 60 eliminated.																										
1984	Noncovered pension offset limited to two-thirds of such pension.																										
Surviving divorced wife																													
1965	60 or older	82.5	Fully insured. Dependent. Married 20 years. Not counted toward family maximum. Reduced 5/9 of 1 percent for each month under age 62.																										
1972	65 or older	100	Limited, if former husband retired before age 65, to amount he would be receiving if still living, but not less than 82 1/2 percent of PIA.																										
	60–64	...	Reduced 19/40 of 1 percent for each month under age 65. In addition, for widow aged 62–64 whose former husband retired before age 65, limited to amount he would be receiving if still living, but not less than 82 1/2 percent of PIA.																										

(Continued)

Table 2.A22—Monthly benefits for survivors of deceased workers—Continued

Year enacted	Age	Percentage of PIA	Condition or qualification
Surviving divorced wife (cont.)			
1977	Dependency requirement eliminated.
	Increased by any delayed retirement increment former husband would be receiving.
	Married 10 years.
	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and married 20 years.
1983	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	65 and 2 months–67	...	Beginning in 2000, the age at which 100 percent of PIA is payable will be gradually increased (see Widow).
	60–66	...	The percent of reduction for each month depends on the age at which 100 percent of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2 percent at age 60.
1984	Noncovered pension offset limited to two-thirds of such pension.
Disabled surviving divorced wife			
1967	50–59	82.5	Fully insured. Dependent. Married 20 years. Not counted toward family maximum. Reduced 13 1/3 percent, plus 43/198 of 1 percent for each month under age 62.
1972	...	100	Reduced 28 1/2 percent, plus 43/240 of 1 percent for each month under age 60.
	Dependency requirement eliminated.
1977	Increased by any delayed retirement increment husband (or former husband) would be receiving.
	Married 10 years.
	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and married 20 years.
1983	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	Additional reduction for each month under age 60 eliminated.
1984	Noncovered pension offset limited to two-thirds of such pension.
Widowed mother			
1939	Under 65	75	Fully or currently insured. Caring for eligible child.
1965	Eligible child excludes student over age 18.
1977	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.
1981	Eligible child excludes nondisabled child aged 16–17.
1983	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
1984	Noncovered pension offset limited to two-thirds of such pension.
Surviving divorced mother			
1950	Under 65	75	Fully or currently insured. Caring for eligible child. Dependent. Not counted toward family maximum.
1965	Eligible child excludes student over age 18.
1972	Dependency requirement eliminated.
1977	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.
1981	Eligible child excludes nondisabled child aged 16–17.
1983	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
1984	Noncovered pension offset limited to two-thirds of such pension.

(Continued)

2.A OASDI: Benefit Types and Levels

Table 2.A22—Monthly benefits for survivors of deceased workers—Continued

Year enacted	Age	Percentage of PIA	Condition or qualification
Child			
1939	Under 18	50	Fully or currently insured. ^a Student aged 16–17.
1946	...	...	Student requirement eliminated.
1950	...	...	Plus 25 percent of PIA divided among the children.
1960	...	75	Additional 25 percent of PIA eliminated.
1965	...	...	Full-time student.
1972	...	...	Benefits extended to end of quarter or semester in which 22nd birthday occurs while undergraduate student.
	...	...	Includes grandchild under certain circumstances.
1981	18–22	...	Student category eliminated (to be phased out gradually for those entitled before May 1982), except for elementary or secondary school students under age 19.
1996	...	...	Stepchildren must be dependent on worker.
Disabled child			
1956	18 or older	50	Fully or currently insured. ^a Disabled before age 18. Plus 25 percent of PIA divided among the children.
1960	...	75	Additional 25 percent of PIA eliminated.
1972	...	...	Disabled before age 22.
	...	...	Includes grandchild under certain circumstances.
Parent			
1939	65 or older	50	Fully insured. Dependent. No surviving widow or child under age 18.
1946	...	...	No surviving eligible widow or child.
1950	...	75	...
1956	62–64	...	Women.
1958	...	...	No-other-survivor requirement eliminated.
1961	62 or older	82.5	75 percent each if two parents.
Widower			
1950	65 or older	75	Fully and currently insured. Dependent.
1961	62 or older	82.5	...
1967	...	...	Currently insured requirement eliminated.
1972	65 or older	100	Limited, if wife retired before age 65, to amount wife would be receiving if still living, but not less than 82 1/2 percent of PIA.
	60–64	...	Reduced 19/40 of 1 percent for each month under age 65. In addition, for a widower aged 62–64 whose wife retired before age 65, limited to amount she would be receiving if still living, but not less than 82 1/2 percent of PIA.
1977	...	...	Dependency requirement eliminated.
	...	...	Increased by any delayed retirement increment wife would be receiving.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982, dependent, and not remarried before age 60.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	65 and 2 months–67	...	Beginning in 2000, the age at which 100 percent of PIA is payable will be gradually increased (see Widow).
	60–66	...	The percent of reduction for each month depends on the age at which 100 percent of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2 percent at age 60.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.

(Continued)

Table 2.A22—Monthly benefits for survivors of deceased workers—Continued

Year enacted	Age	Percentage of PIA	Condition or qualification
Disabled widower			
1967	50–61	82.5	Fully insured. Dependent. Reduced 5/9 of 1 percent per month between ages 60–62, plus 43/198 of 1 percent for each month under age 60.
1972	50–59	100	Reduced 28 1/2 percent, plus 43/240 of 1 percent for each month under age 60. Disability requirement eliminated for ages 60–61.
	...	...	Dependency requirement eliminated.
1977	...	...	Increased by any delayed retirement increment wife would be receiving.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982, dependent, and not remarried before age 60.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	...	...	Additional reduction for each month under age 60 eliminated.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Surviving divorced husband			
1980 ^b	65 or older	100	Fully insured. Married 10 years. Increased by any delayed retirement credit former wife would be receiving. Limited, if former wife retired before age 65, to amount she would be receiving if still living, but not less than 82 1/2 percent of PIA. Not counted toward family maximum. Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset).
	60–64	...	Reduced 19/40 of 1 percent for each month under age 65. In addition, for a widower aged 62–64 whose wife retired before age 65, limited to amount she would be receiving if still living, but not less than 82 1/2 percent of PIA.
1983	...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	65 and 2 months–67	...	Beginning in 2000, the age at which 100 percent of PIA is payable will be gradually increased (see Widower).
	60–66	...	The percent of reduction for each month depends on the age at which 100 percent of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2 percent at age 60.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Disabled surviving divorced husband			
1980 ^b	50–59	100	Fully insured. Married 10 years. Increased by any delayed retirement credit former wife would be receiving. Reduced 28 1/2 percent, plus 43/240 of 1 percent for each month under age 60. Not counted toward family maximum. Reduced by full amount of pension payable based on own earnings in noncovered employment (noncovered pension offset).
1983	...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	...	...	Additional reduction for each month under age 60 eliminated.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Widowed father			
1975 ^c	Under 65	75	Fully or currently insured. Caring for eligible child under age 18.
1977	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.
1981	...	...	Eligible child excludes nondisabled child aged 16–17.
1983	...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
1984	...	...	Noncovered pension offset to two-thirds of such pension.

(Continued)

2.A OASDI: Benefit Types and Levels

Table 2.A22—Monthly benefits for survivors of deceased workers—Continued

Year enacted	Age	Percentage of PIA	Condition or qualification
Surviving divorced father			
1979 ^d	Under 65	75	Fully or currently insured. Caring for eligible child under age 18. Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset).
1981	...	...	Eligible child excludes nondisabled child aged 16–17.
1983	...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

NOTE: PIA = primary insurance amount; ... = not applicable.

- a. Under the Act of 1939, generally not available to child of married female worker. Under the Act of 1950, available if female worker is fully and currently insured; currently insured requirement eliminated by the Act of 1967.
- b. Oregon District Court decision in *Ambrose v. Harris*, July 17, 1980. Statutory change enacted in 1983.
- c. Supreme Court decision in *Weinberger v. Wiesenfeld*, March 19, 1975. Statutory change enacted in 1983.
- d. Western District Court decision in *Yates v. Califano*, January 28, 1979. Statutory change enacted in 1983.

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Table 2.A23—Monthly benefits for transitionally insured workers and their spouses and surviving spouses, aged 72 before 1969

Type of benefit	Effective date	Amount
<i>Enacted in 1965</i>		
Worker	September 1965	\$35.00
	October 1966	Same as benefit for individual receiving special age-72 benefits (see Table 2.A24)
Wife	September 1963	One-half of worker's benefit
Widow	September 1963	Same as worker's benefit
<i>Enacted in 1983</i>		
Husband	May 1983	One-half of worker's benefit
Widower	May 1983	Same as worker's benefit

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

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2.A OASDI: Benefit Types and Levels

Table 2.A24—Monthly benefits for individuals and couples insured for special age-72 (Prouty) benefits

Year enacted	Effective date	Age	Amount ^a (dollars)	
			Individual	Couple
1966	October 1966	72	35.00	52.50
1967	February 1968	...	40.00	60.00
1969	January 1970	...	46.00	69.00
1971	January 1971	...	48.30	72.50
1972 ^b	September 1972	...	58.00	87.00
1973 ^c	June–December 1974	...	61.50	92.30
1973 ^d	March 1974	...	62.10	93.20
	June 1974	...	64.40	96.60
	June 1975	...	69.50	104.40
	June 1976	...	74.10	111.20
	June 1977	...	78.50	117.80
	June 1978	...	83.70	125.60
	June 1979	...	92.00	138.10
	June 1980	...	105.20	157.90
	June 1981	...	117.00	175.70
	June 1982	...	125.60	188.60
1983 ^e	December 1983	...	129.90	...
	December 1984	...	134.40	...
	December 1985	...	138.50	...
	December 1986	...	140.30	...
	December 1987	...	146.10	...
	December 1988	...	151.90	...
	December 1989	...	159.00	...

(Continued)

Table 2.A24—Monthly benefits for individuals and couples insured for special age-72 (Prouty) benefits—Continued

Year enacted	Effective date	Age	Amount ^a (dollars)	
			Individual	Couple
1990	December 1990	72 before 1972 ^f	167.50	...
	December 1991	...	173.60	...
	December 1992	...	178.80	...
	December 1993	...	183.40	...
	December 1994	...	188.50	...
	December 1995	...	193.40	...
	December 1996	...	199.00	...
	December 1997	...	203.10	...
	December 1998	...	205.70	...
	December 1999 ^g	...	210.80	...
	December 2000	...	218.10	...
	December 2001	...	223.70	...
	December 2002	...	226.80	...
	December 2003	...	231.50	...
	December 2004	...	237.70	...
	December 2005	...	247.40	...
	December 2006	...	255.50	...
	December 2007	...	261.30	...
	December 2008	...	276.40	...
	December 2009	...	276.40	...

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTE: ... = not applicable.

- a. Monthly benefit reduced by amount of any government pension excluding workers' compensation benefits and veterans' compensation for service-connected disability or death. Not available for persons receiving assistance.
- b. Provision for future automatic cost-of-living adjustments (COLAs).
- c. Suspended by legislation in 1973.
- d. Beginning June 1975, subject to automatic COLAs. Benefits no longer available to persons receiving payments under the Supplemental Security Income program.
- e. Separate rate for couples eliminated. Rate for individuals applied to all beneficiaries.
- f. Effective for applications after November 5, 1990.
- g. The COLA for December 1999 was originally determined to be 2.4 percent, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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2.A OASDI: Benefit Types and Levels

Table 2.A25—Lump-sum benefits and vocational rehabilitation services, by type of benefit

Year enacted	Provision
<i>Lump-sum refund</i>	
1935	Persons not insured at age 65 eligible for lump-sum refund equal to 3.5 percent of cumulative wage credits.
1939	Lump-sum refund eliminated.
<i>Lump-sum death payment</i>	
1935	Under age 65: 3.5 percent of cumulative wage credits. Aged 65 or older and fully insured: 3.5 percent of cumulative wage credits, less monthly benefits received.
1939	Fully and currently insured: 6 times PIA if no survivor eligible for monthly benefits.
1950	3 times PIA for all deaths.
1954	3 times PIA with maximum of \$255.
1981	Payable only to a widow or widower who was living with the worker at time of the death or to a widow, widower, or children eligible for monthly benefits. ^a
<i>Vocational rehabilitation services</i>	
1965	Available to selected disabled individuals. Costs of services payable from OASDI trust funds to state vocational rehabilitation agencies. Reimbursement in any year may not exceed 1 percent of the total amount of OASDI disability benefits disbursed in the prior year.
1972	Maximum annual reimbursement increased to 1.25 percent for fiscal year ending June 30, 1973, and 1.50 percent thereafter.
1981	Reimbursement from trust funds for cost of rehabilitation services made if the services result in the disabled individual's return to work (performance of substantial gainful activity for 9 consecutive months).
1999	Enhancements including expanded beneficiary choice of service providers and extended health care for beneficiaries who return to work.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

NOTE: OASDI = Old-Age, Survivors, and Disability Insurance; PIA = Primary Insurance Amount.

a. The amount of the lump sum is effectively fixed at \$255 because of increases in the pre-1981 PIA. The 1981 legislation eliminating the minimum PIA is not applicable to the calculation of the lump-sum death payment.

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2.A OASDI: Benefit Types and Levels

Table 2.A26—Monthly benefit amount for selected beneficiary families with first eligibility in 2009, by average indexed monthly earnings for stipulated yearly wage levels, effective December 2009 (in dollars)

Beneficiary family	Federal minimum wage ^a	75 percent of average wage	Average wage ^b	150 percent of average wage	Maximum taxable earnings ^c
<i>Retired-worker families^d</i>					
Average indexed monthly earnings	1,431.00	2,527.00	3,369.00	5,054.00	7,685.00
Primary insurance amount	889.40	1,240.10	1,509.60	1,951.70	2,346.30
Maximum family benefit	1,334.10	2,214.00	2,757.20	3,416.30	4,106.80
Monthly benefit amount for retired worker claiming benefits at age 62					
Worker alone	667.00	930.00	1,132.00	1,463.00	1,759.00
Worker with spouse claiming benefits at—					
Full retirement age or older ^e	1,111.00	1,550.00	1,886.00	2,438.00	2,932.00
Age 62	978.00	1,364.00	1,660.00	2,146.00	2,580.00
<i>Survivor families^f</i>					
Average indexed monthly earnings	1,205.00	2,529.00	3,373.00	5,059.00	8,344.00
Primary insurance amount	817.10	1,240.80	1,510.80	1,952.40	2,445.20
Maximum family benefit	1,225.60	2,215.90	2,758.80	3,417.50	4,279.90
Monthly benefit amount for survivor of worker deceased at age 40					
1 surviving child	612.00	930.00	1,133.00	1,464.00	1,833.00
Widowed mother or father and 1 child	1,224.00	1,860.00	2,266.00	2,928.00	3,666.00
Widowed mother or father and 2 children	1,224.00	2,214.00	2,757.00	3,417.00	4,278.00
<i>Disabled-worker families^g</i>					
Average indexed monthly earnings	1,287.00	2,527.00	3,370.00	5,055.00	8,216.00
Primary insurance amount	843.30	1,240.10	1,509.90	1,951.80	2,426.00
Maximum family benefit ^h	1,093.90	1,860.10	2,264.80	2,927.70	3,639.00
Monthly benefit amount for disabled worker age 50					
Worker alone	843.00	1,240.00	1,509.00	1,951.00	2,426.00
Worker, spouse, and 1 child	1,093.00	1,860.00	2,263.00	2,925.00	3,638.00

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

- a. Annual earnings are calculated by multiplying the federal minimum wage by 2,080 hours (see Table 3.B3). Increases in the minimum wage during the year are prorated.
- b. See Table 2.A8.
- c. See Table 2.A9.
- d. Assumes the worker began to work at age 22, retired at age 62 in 2009 with maximum reduction, and had no prior period of disability.
- e. The full retirement age is the earliest age at which an unreduced spousal benefit is payable.
- f. Assumes the deceased worker began to work at age 22, died in 2009 at age 40, had no earnings in that year, and had no prior period of disability.
- g. Assumes the worker began to work at age 22, became disabled at age 50 in 2009, had no earnings in that year, and had no prior period of disability.
- h. The Amendments of 1980 to the Social Security Act provide for a different family maximum amount in disability cases. For disabled workers entitled after June 1980, the maximum is the smaller of (1) 85 percent of the worker's average indexed monthly earnings (or 100 percent of the primary insurance amount, if larger) or (2) 150 percent of the primary insurance amount.

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2.A OASDI: Benefit Types and Levels

Table 2.A27—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 62, by year they attained age 62, 1957–2010 (in dollars)

Year ^a	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2009 ^b	At retirement		Effective December 2009 ^b	
			Men	Women	Men	Women
1957	24.00	380.10	...	86.80	...	937.70
1958	24.00	380.10	...	86.80	...	937.70
1959	26.40	380.10	...	92.80	...	937.70
1960	26.40	378.50	...	95.20	...	961.80
1961	26.40	376.50	...	96.00	...	968.70
1962	32.00	375.20	93.60	96.80	944.70	977.30
1963	32.00	373.40	94.40	97.60	951.30	983.90
1964	32.00	373.40	95.20	98.40	957.40	990.20
1965	35.20	373.00	102.80	105.40	962.70	988.20
1966	35.20	369.70	102.80	106.20	959.50	991.60
1967	35.20	367.60	105.40	108.80	980.80	1,011.80
1968	^c 44.00	362.70	^c 121.00	^c 124.80	985.70	1,018.10
1969	44.00	359.20	124.80	128.40	1,007.20	1,036.70
1970	51.20	354.10	146.80	151.90	1,016.90	1,051.90
1971	56.40	349.40	163.60	170.50	1,015.20	1,059.00
1972	56.40	344.40	167.10	172.90	1,023.50	1,058.80
1973	67.60	339.70	207.60	212.90	1,042.50	1,070.20
1974	67.60	334.20	217.00	219.70	1,074.70	1,087.60
1975	75.10	329.80	253.10	253.10	1,112.60	1,112.60
1976	81.20	325.90	285.60	285.60	1,148.80	1,148.80
1977	86.40	323.50	319.40	319.40	1,199.30	1,199.30
1978	91.50	322.00	354.60	354.60	1,254.30	1,254.30
1979	97.60	323.30	^d 388.90	^d 388.90	1,292.00	1,292.00
1980	97.60	293.80	^d 402.80	^d 402.80	1,217.40	1,217.40
1981	97.60	256.60	432.00	432.00	1,141.80	1,141.80
1982	^e	^e	474.60	474.60	1,128.40	1,128.40
1983	^e	^e	526.40	526.40	1,164.90	1,164.90
1984	^e	^e	559.40	559.40	1,196.30	1,196.30
1985	^e	^e	591.30	591.30	1,222.30	1,222.30
1986	^e	^e	630.50	630.50	1,264.00	1,264.00
1987	^e	^e	662.10	662.10	1,310.40	1,310.40
1988	^e	^e	686.70	686.70	1,304.50	1,304.50
1989	^e	^e	734.00	734.00	1,340.40	1,340.40
1990	^e	^e	774.60	774.60	1,351.40	1,351.40
1991	^e	^e	810.00	810.00	1,340.60	1,340.60
1992	^e	^e	854.10	854.10	1,363.70	1,363.70
1993	^e	^e	893.60	893.60	1,385.30	1,385.30
1994	^e	^e	948.00	948.00	1,432.40	1,432.40
1995	^e	^e	965.90	965.90	1,419.90	1,419.90
1996	^e	^e	999.90	999.90	1,432.60	1,432.60
1997	^e	^e	1,049.10	1,049.10	1,461.00	1,461.00
1998	^e	^e	1,109.60	1,109.60	1,513.50	1,513.50
1999	^e	^e	1,183.60	1,183.60	^f 1,593.70	^f 1,593.70

(Continued)

Table 2.A27—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 62, by year they attained age 62, 1957–2010 (in dollars)—Continued

Year ^a	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2009 ^b	At retirement		Effective December 2009 ^b	
			Men	Women	Men	Women
2000	e	e	1,241.70	1,241.70	1,631.20	1,631.20
2001	e	e	1,307.30	1,307.30	1,659.20	1,659.20
2002	e	e	1,375.30	1,375.30	1,701.50	1,701.50
2003	e	e	1,404.30	1,404.30	1,713.50	1,713.50
2004	e	e	1,414.80	1,414.80	1,690.80	1,690.80
2005	e	e	1,444.90	1,444.90	1,681.50	1,681.50
2006	e	e	1,522.50	1,522.50	1,702.10	1,702.10
2007	e	e	1,589.40	1,589.40	1,720.20	1,720.20
2008	e	e	1,672.70	1,672.70	1,769.70	1,769.70
2009	e	e	1,759.70	1,759.70	1,759.70	1,759.70
2010	e	e	1,809.90	1,809.90	...	...

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTES: Benefit first available at age 62 to female workers effective November 1956 and to male workers effective August 1961.

... = not applicable.

- a. Assumes the worker began to work at age 22, retired at the beginning of the year, had no prior disability, and received the maximum reduction. Through 1999, the assumed reduction was 36 months at 5/9 of 1 percent per month, or 20 percent. In 2000, with the increase in the full retirement age (FRA) to 65 and 2 months, the reduction increased to 20.008333 percent (see Tables 2.A17.1 and 2.A20). In 2001, the FRA increased to 65 and 4 months for a maximum reduction of 21.666667 percent. In 2002, the FRA increased to 65 and 6 months for a maximum reduction of 22.5 percent. In 2003, the FRA increased to 65 and 8 months for a maximum reduction of 23.333333 percent. In 2004, the FRA increased to 65 and 10 months for a maximum reduction of 24.16667 percent. In 2005, the FRA increased to 66 for a maximum reduction of 25 percent.
- b. Final benefit amount payable after Supplementary Medical Insurance (SMI) premium or any other deduction is rounded to next lower \$1.
- c. Effective February 1968.
- d. Derived from transitional guarantee computation based on primary insurance amount (PIA) table of 1978.
- e. In 1981, legislation eliminated the minimum PIA for workers who attain age 62 in 1982 or later. (The minimum is retained until 1991 for members of religious orders who were under a vow of poverty, provided that the order had elected Social Security coverage before December 29, 1981.)
- f. The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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2.A OASDI: Benefit Types and Levels

Table 2.A28—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 65, by year they attained age 65, 1940–2010 (in dollars)

Year ^a	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2009 ^b	At retirement		Effective December 2009 ^b	
			Men	Women	Men	Women
1940	10.00	403.40	41.20	41.20	782.20	782.20
1941	10.00	403.40	41.60	41.60	782.20	782.20
1942	10.00	403.40	42.00	42.00	791.50	791.50
1943	10.00	403.40	42.40	42.40	791.50	791.50
1944	10.00	403.40	42.80	42.80	791.50	791.50
1945	10.00	403.40	43.20	43.20	800.10	800.10
1946	10.00	403.40	43.60	43.60	809.80	809.80
1947	10.00	403.40	44.00	44.00	817.30	817.30
1948	10.00	403.40	44.40	44.40	817.30	817.30
1949	10.00	403.40	44.80	44.80	825.60	825.60
1950	10.00	403.40	45.20	45.20	835.80	835.80
1951	20.00	403.40	68.50	68.50	835.80	835.80
1952	20.00	403.40	68.50	68.50	835.80	835.80
1953	25.00	403.40	85.00	85.00	923.50	923.50
1954	25.00	403.40	85.00	85.00	923.50	923.50
1955	30.00	403.40	98.50	98.50	923.50	923.50
1956	30.00	403.40	103.50	103.50	975.70	975.70
1957	30.00	403.40	108.50	108.50	1,019.90	1,019.90
1958	30.00	403.40	108.50	108.50	1,019.90	1,019.90
1959	33.00	403.40	116.00	116.00	1,019.90	1,019.90
1960	33.00	403.40	119.00	119.00	1,045.50	1,045.50
1961	33.00	403.40	120.00	120.00	1,053.80	1,053.80
1962	40.00	403.40	121.00	123.00	1,063.30	1,081.50
1963	40.00	403.40	122.00	125.00	1,071.80	1,097.50
1964	40.00	403.40	123.00	127.00	1,081.50	1,116.10
1965	44.00	403.40	131.70	135.90	1,081.50	1,116.10
1966	44.00	403.40	132.70	135.90	1,089.40	1,116.10
1967	44.00	403.40	135.90	140.00	1,116.10	1,149.00
1968	^c 55.00	403.40	^c 156.00	^c 161.60	1,132.80	1,173.60
1969	55.00	403.40	160.50	167.30	1,166.00	1,215.10
1970	64.00	403.40	189.80	196.40	1,198.60	1,241.30
1971	70.40	403.40	213.10	220.40	1,223.10	1,264.20
1972	70.40	403.40	216.10	224.70	1,241.30	1,289.80
1973	84.50	403.40	266.10	276.40	1,272.90	1,322.30
1974	84.50	403.40	274.60	284.90	1,312.90	1,362.90
1975	93.80	403.40	316.30	333.70	1,362.90	1,437.80
1976	101.40	403.40	364.00	378.80	1,451.20	1,510.40
1977	107.90	403.40	412.70	422.40	1,547.00	1,582.80
1978	114.30	403.40	459.80	459.80	1,627.40	1,627.40
1979	121.80	403.40	503.40	503.40	1,672.50	1,672.50
1980	133.90	403.40	572.00	572.00	1,729.40	1,729.40
1981	153.10	403.40	677.00	677.00	1,790.70	1,790.70
1982	^d 170.30	403.40	^d 679.30	^d 679.30	1,614.90	1,614.90
1983	^d 166.40	366.90	709.50	709.50	1,571.00	1,571.00
1984	^d 150.50	320.10	703.60	703.60	1,505.20	1,505.20
1985	^e	^e	717.20	717.20	1,482.70	1,482.70
1986	^e	^e	760.10	760.10	1,524.00	1,524.00
1987	^e	^e	789.20	789.20	1,562.40	1,562.40
1988	^e	^e	838.60	838.60	1,593.40	1,593.40
1989	^e	^e	899.60	899.60	1,643.30	1,643.30
1990	^e	^e	975.00	975.00	1,701.50	1,701.50
1991	^e	^e	1,022.90	1,022.90	1,693.60	1,693.60
1992	^e	^e	1,088.70	1,088.70	1,738.60	1,738.60
1993	^e	^e	1,128.80	1,128.80	1,750.10	1,750.10
1994	^e	^e	1,147.50	1,147.50	1,733.90	1,733.90
1995	^e	^e	1,199.10	1,199.10	1,762.80	1,762.80
1996	^e	^e	1,248.90	1,248.90	1,789.60	1,789.60
1997	^e	^e	1,326.60	1,326.60	1,847.50	1,847.50
1998	^e	^e	1,342.80	1,342.80	1,831.70	1,831.70
1999	^e	^e	1,373.10	1,373.10	1,848.90	1,848.90

(Continued)

Table 2.A28—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 65, by year they attained age 65, 1940–2010 (in dollars)—Continued

Year ^a	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2009 ^b	At retirement		Effective December 2009 ^b	
			Men	Women	Men	Women
2000	e	e	1,435.30	1,435.30	1,885.70	1,885.70
2001	e	e	^f 1,538.20	^f 1,538.20	1,952.50	1,952.50
2002	e	e	1,660.50	1,660.50	2,054.50	2,054.50
2003 ^g	e	e	1,721.70	1,721.70	2,100.90	2,100.90
2004 ^h	e	e	1,784.80	1,784.80	2,133.10	2,133.10
2005 ⁱ	e	e	1,874.30	1,874.30	2,181.20	2,181.20
2006 ^j	e	e	1,961.90	1,961.90	2,193.40	2,193.40
2007 ^k	e	e	1,998.70	1,998.70	2,163.10	2,163.10
2008 ^l	e	e	2,030.60	2,030.60	2,148.30	2,148.30
2009 ^m	e	e	2,172.40	2,172.40	2,172.40	2,172.40
2010 ⁿ	e	e	2,191.70	2,191.70	...	...

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTE: ... = not applicable.

- a. Through 2002, assumes that the worker began to work at age 22, retired at the beginning of the year with unreduced benefits, had no earnings after retirement, and had no prior period of disability. Effective 2003, the same assumptions apply except that the benefit is reduced by 2 months because, for a worker retiring at age 65 in 2003, the age at which one can receive an unreduced benefit—the full retirement age (FRA)—has been raised from 65 to 65 and 2 months. In 2004, the FRA is 65 and 4 months, so the benefit is reduced by 4 months. In 2005, the FRA is 65 and 6 months, so the benefit is reduced by 6 months. In 2006, the FRA is 65 and 8 months, so the benefit is reduced by 8 months. In 2007, the FRA is 65 and 10 months, so the benefit is reduced by 10 months. Beginning in 2008, the FRA is 66, so the benefit is reduced by 12 months.
- b. Final benefit amount payable after Supplementary Medical Insurance (SMI) premium or any other deduction is rounded to next lower \$1.
- c. Effective February 1968.
- d. Derived from transitional guarantee computation based on primary insurance amount (PIA) table of 1978.
- e. In 1981, legislation eliminated the minimum PIA for workers who attain age 62 in 1982 or later. (The minimum is retained until 1991 for members of religious orders who are under a vow of poverty, provided that the order had elected Social Security coverage before December 29, 1981.)
- f. The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.
- g. The full retirement benefit at age 65 and 2 months is \$1,741.10.
- h. The full retirement benefit at age 65 and 4 months is \$1,825.40.
- i. The full retirement benefit at age 65 and 6 months is \$1,939.00.
- j. The full retirement benefit at age 65 and 8 months is \$2,053.20.
- k. The full retirement benefit at age 65 and 10 months is \$2,116.30.
- l. The full retirement benefit at age 66 in 2008 is \$2,185.40.
- m. The full retirement benefit at age 66 in 2009 is \$2,323.80.
- n. The full retirement benefit at age 66 in 2010 is \$2,346.80.

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2.A OASDI: Effect of Current Earnings and Taxation of Benefits

Table 2.A29—Earnings (retirement) test for years through 1999, by year enacted

Year enacted	Effective year	Beneficiaries exempt	Earnings subject to test	Amount permitted without reduction in benefits (exempt amount)		Reduction in monthly benefit ^a
				Annual earnings (dollars)	Monthly wages ^b (dollars)	
For all beneficiaries						
1935	...	...	Covered	...	...	Full monthly benefit
1939	1940	...	...	...	14.99	...
1950	1951	Aged 75 or older	...	^c 600	50.00	...
1952	1953	...	...	^c 900	75.00	...
1954	1955	Aged 72 or older	All ^d	1,200	80.00	One month's full benefit for each \$80.00 or fraction thereof
1956	1958	Disabled	...	...	...	...
1958	1959	...	...	...	100.00	...
1960	1961	...	...	...	...	\$1 for each \$2 of earnings from \$1,201–\$1,500
						\$1 for each \$1 of earnings above \$1,500
1961	1962	...	...	...	...	\$1 for each \$2 of earnings from \$1,201–\$1,700
						\$1 for each \$1 of earnings above \$1,700
1965	1966	...	...	1,500	125.00	\$1 for each \$2 of earnings from \$1,501–\$2,700
						\$1 for each \$1 of earnings above \$2,700
1967	1968	...	...	1,680	140.00	\$1 for each \$2 of earnings from \$1,681–\$2,880
						\$1 for each \$1 of earnings above \$2,880
1972	1973	...	Up to age 72	2,100	175.00	\$1 for each \$2 of earnings above \$2,100
1973	1974	...	...	2,400	200.00	\$1 for each \$2 of earnings above \$2,400
	1975			^e 2,520	^e 210.00	\$1 for each \$2 of earnings above \$2,520
	1976			^e 2,760	^e 230.00	\$1 for each \$2 of earnings above \$2,760
	1977			^e 3,000	^e 250.00	\$1 for each \$2 of earnings above \$3,000
For beneficiaries who have not reached full retirement age ^f						
1977	1978	...	...	^e 3,240	^e 270.00	\$1 for each \$2 of earnings above \$3,240
	1979			^e 3,480	^e 290.00	\$1 for each \$2 of earnings above \$3,480
	1980			^e 3,720	^e 310.00	\$1 for each \$2 of earnings above \$3,720
	1981			^e 4,080	^e 340.00	\$1 for each \$2 of earnings above \$4,080
	1982			^e 4,440	^e 370.00	\$1 for each \$2 of earnings above \$4,440
	1983			^e 4,920	^e 410.00	\$1 for each \$2 of earnings above \$4,920
	1984			^e 5,160	^e 430.00	\$1 for each \$2 of earnings above \$5,160
	1985			^e 5,400	^e 450.00	\$1 for each \$2 of earnings above \$5,400
	1986			^e 5,760	^e 480.00	\$1 for each \$2 of earnings above \$5,760
	1987			^e 6,000	^e 500.00	\$1 for each \$2 of earnings above \$6,000
	1988			^e 6,120	^e 510.00	\$1 for each \$2 of earnings above \$6,120
	1989			^e 6,480	^e 540.00	\$1 for each \$2 of earnings above \$6,480
	1990			^e 6,840	^e 570.00	\$1 for each \$2 of earnings above \$6,840
	1991			^e 7,080	^e 590.00	\$1 for each \$2 of earnings above \$7,080
	1992			^e 7,440	^e 620.00	\$1 for each \$2 of earnings above \$7,440
	1993			^e 7,680	^e 640.00	\$1 for each \$2 of earnings above \$7,680
	1994			^e 8,040	^e 670.00	\$1 for each \$2 of earnings above \$8,040
	1995			^e 8,160	^e 680.00	\$1 for each \$2 of earnings above \$8,160
	1996			^e 8,280	^e 690.00	\$1 for each \$2 of earnings above \$8,280
	1997			^e 8,640	^e 720.00	\$1 for each \$2 of earnings above \$8,640
	1998			^e 9,120	^e 760.00	\$1 for each \$2 of earnings above \$9,120
	1999			^e 9,600	^e 800.00	\$1 for each \$2 of earnings above \$9,600

(Continued)

2.A OASDI: Effect of Current Earnings and Taxation of Benefits

Table 2.A29—Earnings (retirement) test for years through 1999, by year enacted—Continued

Year enacted	Effective year	Beneficiaries exempt	Earnings subject to test	Amount permitted without reduction in benefits (exempt amount)		Reduction in monthly benefit ^a
				Annual earnings (dollars)	Monthly wages ^b (dollars)	
<i>For beneficiaries who have reached full retirement age ^f</i>						
1977	1978	...	...	^g 4,000	^g 333.33	\$1 for each \$2 of earnings above \$4,000
	1979			^g 4,500	^g 375.00	\$1 for each \$2 of earnings above \$4,500
	1980			^g 5,000	^g 416.66	\$1 for each \$2 of earnings above \$5,000
	1981			^g 5,500	^g 458.33	\$1 for each \$2 of earnings above \$5,500
	1982			^g 6,000	^g 500.00	\$1 for each \$2 of earnings above \$6,000
1981	1983	Aged 70 or older	Up to age 70	...	...	...
	1983			^e 6,600	^e 550.00	\$1 for each \$2 of earnings above \$6,600
	1984			^e 6,960	^e 580.00	\$1 for each \$2 of earnings above \$6,960
	1985			^e 7,320	^e 610.00	\$1 for each \$2 of earnings above \$7,320
	1986			^e 7,800	^e 650.00	\$1 for each \$2 of earnings above \$7,800
	1987			^e 8,160	^e 680.00	\$1 for each \$2 of earnings above \$8,160
	1988			^e 8,400	^e 700.00	\$1 for each \$2 of earnings above \$8,400
	1989			^e 8,880	^e 740.00	\$1 for each \$2 of earnings above \$8,880
1983	1990	...	...	...	...	\$1 for each \$3 of earnings above exempt amount
	1990			^e 9,360	^e 780.00	\$1 for each \$3 of earnings above \$9,360
	1991			^e 9,720	^e 810.00	\$1 for each \$3 of earnings above \$9,720
	1992			^e 10,200	^e 850.00	\$1 for each \$3 of earnings above \$10,200
	1993			^e 10,560	^e 880.00	\$1 for each \$3 of earnings above \$10,560
	1994			^e 11,160	^e 930.00	\$1 for each \$3 of earnings above \$11,160
	1995			^e 11,280	^e 940.00	\$1 for each \$3 of earnings above \$11,280
1996	1996	...	...	12,500	^h 1,041.67	\$1 for each \$3 of earnings above \$12,500
	1997			13,500	1,125.00	\$1 for each \$3 of earnings above \$13,500
	1998			14,500	ⁱ 1,208.33	\$1 for each \$3 of earnings above \$14,500
	1999			15,500	^j 1,291.67	\$1 for each \$3 of earnings above \$15,500
2000	2000	...	Earnings test eliminated at full retirement age ^k	...	...	...

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

NOTE: ... = not applicable.

- a. Earnings of a retired-worker beneficiary affect total monthly family benefit. Earnings of a dependent or survivor beneficiary affect only his or her benefit. However, effective January 1985, earnings of a retired-worker beneficiary do not affect the benefit to a divorced spouse who has been divorced at least 2 years. Effective for benefits after December 1990, the 2-year requirement is waived if the worker was entitled to benefits before the divorce.
- b. Monthly test for self-employment income is defined in terms of substantial services. For taxable years beginning after December 31, 1977, monthly test eliminated for wage and self-employment income except that each individual may use a monthly test for 1 grace year, usually the year of retirement.
- c. Applied to self-employment income only.
- d. Special provisions for earnings in noncovered employment outside the United States.
- e. Became effective because of automatic adjustment provisions mandated by legislation in 1972 and 1973.
- f. Full retirement age (FRA) is 65 for beneficiaries who attain age 62 (age 60 for widow(er)s) before 2000, gradually increasing to age 67 for beneficiaries who attain age 62 in 2022 or later.
- g. Discretionary increase included in legislation of 1977.
- h. Actual amount is \$1,041.66 2/3.
- i. Actual amount is \$1,208.33 1/3.
- j. Actual amount is \$1,291.66 2/3.
- k. Public Law (P.L.) 106-182, enacted April 7, 2000, eliminated the earnings test beginning with the month a beneficiary reaches FRA. The annual earnings test that applies in the year of attainment of FRA is based on the annual limits established under P.L. 104-121 (including the \$1 for \$3 withholding rate). In determining annual earnings for purposes of the annual earnings test under this legislation, only earnings before the month of attainment of FRA will be considered. P.L. 106-182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year, which continues to be pegged to increases in the average wage.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

2.A OASDI: Effect of Current Earnings and Taxation of Benefits

Table 2.A29.1—Earnings (retirement) test for 2000–2010, by year enacted

Year enacted	Effective year	Beneficiaries exempt	Earnings subject to test	Amount permitted without reduction in benefits (exempt amount)		Reduction in monthly benefit ^a
				Annual earnings ^b (dollars)	Monthly wages ^c (dollars)	
For beneficiaries who have reached full retirement age ^d						
2000	2000	...	The earnings test no longer applies effective with the month of attainment of full retirement age.	...	...	...
For beneficiaries who will not reach full retirement age during year ^d						
2000	2000	...	...	10,080	840	\$1 for each \$2 of earnings above \$10,080
	2001			10,680	890	\$1 for each \$2 of earnings above \$10,680
	2002			11,280	940	\$1 for each \$2 of earnings above \$11,280
	2003			11,520	960	\$1 for each \$2 of earnings above \$11,520
	2004			11,640	970	\$1 for each \$2 of earnings above \$11,640
	2005			12,000	1,000	\$1 for each \$2 of earnings above \$12,000
	2006			12,480	1,040	\$1 for each \$2 of earnings above \$12,480
	2007			12,960	1,080	\$1 for each \$2 of earnings above \$12,960
	2008			13,560	1,130	\$1 for each \$2 of earnings above \$13,560
	2009			14,160	1,180	\$1 for each \$2 of earnings above \$14,160
	2010			14,160	1,180	\$1 for each \$2 of earnings above \$14,160
For beneficiaries who will reach full retirement age during year ^d						
2000	2000	...	...	17,000	^e 1,416.67	\$1 for each \$3 of earnings above \$17,000
	2001			25,000	^f 2,083.33	\$1 for each \$3 of earnings above \$25,000
	2002			30,000	2,500.00	\$1 for each \$3 of earnings above \$30,000
	2003			30,720	2,560.00	\$1 for each \$3 of earnings above \$30,720
	2004			31,080	2,590.00	\$1 for each \$3 of earnings above \$31,080
	2005			31,800	2,650.00	\$1 for each \$3 of earnings above \$31,800
	2006			33,240	2,770.00	\$1 for each \$3 of earnings above \$33,240
	2007			34,440	2,870.00	\$1 for each \$3 of earnings above \$34,440
	2008			36,120	3,010.00	\$1 for each \$3 of earnings above \$36,120
	2009			37,680	3,140.00	\$1 for each \$3 of earnings above \$37,680
	2010			37,680	3,140.00	\$1 for each \$3 of earnings above \$37,680

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTES: Public Law (P.L.) 106-182, enacted April 7, 2000, eliminated the earnings test beginning with the month a beneficiary reaches full retirement age (FRA). The annual earnings test that applies in the year of attainment of FRA is based on the annual limits established under P.L. 104-121 (including the \$1 for \$3 withholding rate). In determining annual earnings for purposes of the annual earnings test under this legislation, only earnings before the month of attainment of FRA will be considered. P.L. 106-182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year, which continues to be pegged to increases in the average wage.

... = not applicable.

- Earnings of a retired-worker beneficiary affect total monthly family benefit. Earnings of a dependent or survivor beneficiary affect only his or her benefit. However, earnings of a retired-worker beneficiary do not affect the benefit to a divorced spouse who has been divorced at least 2 years. The 2-year requirement is waived if the worker was entitled to benefits before the divorce.
- Automatic adjustment provisions and legislative history of the earnings test are in Table 2.A18.
- Monthly test for self-employment income is defined in terms of substantial services. Each individual may use a monthly test for 1 grace year, usually the year of retirement.
- Full retirement age is 65 for beneficiaries who attain age 62 (age 60 for widow(er)s) before 2000, gradually increasing to age 67 for beneficiaries who attain age 62 in 2022 or later. See Table 2.A17.1 for the FRA by year of birth.
- Actual amount is \$1,416.66 2/3.
- Actual amount is \$2,083.33 1/3.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

2.A OASDI: Effect of Current Earnings and Taxation of Benefits

Table 2.A30—Monthly earnings guidelines for substantial gainful activity, 1961–2010 (in dollars)

Year	Nonblind beneficiaries ^a		Blind beneficiaries ^b
	Minimum	Maximum	
1961–1965	50	100	c
1966–June 1968	75	125	c
July 1968–1973	90	140	c
1974–1975	130	200	c
1976	150	230	c
1977	160	240	c
1978	170	260	334
1979	180	280	375
1980	190	300	417
1981	190	300	459
1982	190	300	500
1983–1989	190	300	d
1990	300	500	780
1991	300	500	810
1992	300	500	850
1993	300	500	880
1994	300	500	930
1995	300	500	940
1996	300	500	960
1997	300	500	1,000
1998	300	500	1,050
January–June 1999	300	500	1,110
July 1999	300	700	1,110
January 2000	300	700	1,170
January 2001	Discontinued	740	1,240
January 2002	...	780	1,300
January 2003	...	800	1,330
January 2004	...	810	1,350
January 2005	...	830	1,380
January 2006	...	860	1,450
January 2007	...	900	1,500
January 2008	...	940	1,570
January 2009	...	980	1,640
January 2010	...	1,000	1,640

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2010," *Federal Register*, vol. 74, no. 207 (October 28, 2009).

NOTES: Earnings are net of any wage subsidies and impairment-related expenses.

The guidelines for substantial gainful activity (SGA) for self-employed individuals differ from the guidelines for wage earners.

Self-employment activity is generally examined in terms of time spent and degree of effort, as compared with that of nondisabled self-employed individuals.

... = not applicable.

- a. Earnings above the maximum amount ordinarily demonstrate SGA; earnings below the minimum amount show that SGA has not occurred. When earnings are between the minimum and maximum, other factors are considered.
- b. The amendments in 1977 provided that, effective 1978, earnings of blind beneficiaries would be evaluated under different SGA guidelines from those of nonblind beneficiaries.
- c. Pre-1978 guidelines are the same as those for nonblind beneficiaries.
- d. Annual amounts were determined by automatic adjustments linked to increases in average wage level. The amounts equal the monthly exempt amounts under the earnings test applicable to beneficiaries who have reached full retirement age (see Table 2.A29 for the amounts for 1983–1995).

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

2.A OASDI: Effect of Current Earnings and Taxation of Benefits

Table 2.A31—Taxation of Social Security benefits

Year enacted	Individuals or couples with income exceeding (dollars)—	Benefits included in gross income	Effective for taxable years—
Married filing jointly			
1983	32,000	Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits or one-half of income over \$32,000	Ending after December 31, 1983
1993	32,000 but not 44,000	Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits or one-half of income over \$32,000	Beginning after December 31, 1993
	44,000	Lesser of 85 percent of Social Security and Tier 1 Railroad Retirement benefits or the sum of \$6,000 plus 85 percent of income over \$44,000	Beginning after December 31, 1993
Married filing separate returns ^a			
1983	0	Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits or one-half of income	Ending after December 31, 1983
1993	0	Lesser of 85 percent of Social Security and Tier 1 Railroad Retirement benefits or 85 percent of income	Beginning after December 31, 1993
Individuals in all other filing categories			
1983	25,000	Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits or one-half of income over \$25,000	Ending after December 31, 1983
1993	25,000 but not 34,000	Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits or one-half of income over \$25,000	Beginning after December 31, 1993
	34,000	Lesser of 85 percent of Social Security and Tier 1 Railroad Retirement benefits or the sum of \$4,500 plus 85 percent of income over \$34,000	Beginning after December 31, 1993

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Taxation of Social Security benefits is governed by the Internal Revenue Service Code. IRS describes the rules governing taxation of Social Security benefits in IRS publication 915, available at <http://www.irs.gov/pub/irs-pdf/p915.pdf>.

NOTES: Income is defined as modified adjusted gross income, plus 50 percent of Social Security and Tier 1 Railroad Retirement benefits. Modified adjusted gross income is adjusted gross income (before Social Security or Railroad Retirement benefits are considered), plus tax-exempt interest income, with further modification of adjusted gross income in some cases involving certain tax provisions of limited applicability among the beneficiary population.

Social Security and Tier 1 Railroad Retirement benefits include workers' compensation benefits to the extent they cause a reduction in Social Security or Tier 1 Railroad Retirement disability benefits.

a. Includes only married taxpayers filing separately who lived with their spouse at any time during the tax year; married individuals filing separately who did not live with their spouse are treated the same as unmarried individuals.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

2.A OASDI: Effect of Current Earnings and Taxation of Benefits

Table 2.A32—Taxation of Social Security benefits: Examples (in dollars)

Modified adjusted gross income ^a	Amount of benefits ^b	One-half of benefits ^b	Income to be compared with base amount	Relevant base amount ^c	Income in excess of base amount	One-half of excess	85 percent of excess income	Lower of one-half of benefits, or one-half of income between upper and lower base amounts	85 percent of benefits	Taxable benefits included in gross income	
										If income does not exceed upper base amount—lessor of one-half of benefits or one-half of income over base amount (K = lesser of C or G)	If income exceeds upper base amount—lessor of 85 percent of benefits or one-half of income between base amounts plus 85 percent of income over upper base amount (L = lesser of J or I + H)
(A)	(B)	(C)	(D = A + C)	(E)	(F = D - E)	(G = F / 2)	(H = .85 F)	(I)	(J = .85 B)	(K)	(L)
Married filing jointly											
25,000	10,000	5,000	30,000	32,000	0	...	...	...	...	...	...
28,000	10,000	5,000	33,000	32,000	1,000	500	...	...	...	500	...
33,000	10,000	5,000	38,000	32,000	6,000	3,000	...	...	...	3,000	...
38,000	10,000	5,000	43,000	32,000	11,000	5,500	...	...	...	5,000	...
40,000	10,000	5,000	45,000	44,000	1,000	...	850	5,000	8,500	...	5,850
43,000	10,000	5,000	48,000	44,000	4,000	...	3,400	5,000	8,500	...	8,400
45,000	10,000	5,000	50,000	44,000	6,000	...	5,100	5,000	8,500	...	8,500
Married filing separate returns ^d											
0	6,000	3,000	3,000	0	3,000	...	2,550	0	5,100	...	2,550
2,000	6,000	3,000	5,000	0	5,000	...	4,250	0	5,100	...	4,250
4,000	6,000	3,000	7,000	0	7,000	...	5,950	0	5,100	...	5,100
10,000	6,000	3,000	13,000	0	13,000	...	11,050	0	5,100	...	5,100
20,000	6,000	3,000	23,000	0	23,000	...	19,550	0	5,100	...	5,100
Individuals in all other filing categories											
20,000	8,000	4,000	24,000	25,000	0	...	...	...	...	...	...
25,000	8,000	4,000	29,000	25,000	4,000	2,000	...	...	...	2,000	...
30,000	8,000	4,000	34,000	25,000	9,000	4,500	...	...	...	4,000	...
32,000	8,000	4,000	36,000	34,000	2,000	...	1,700	4,000	6,800	...	5,700
35,000	8,000	4,000	39,000	34,000	5,000	...	4,250	4,000	6,800	...	6,800
40,000	8,000	4,000	44,000	34,000	10,000	...	8,500	4,000	6,800	...	6,800

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Taxation of Social Security benefits is governed by the Internal Revenue Service Code. IRS describes the rules governing taxation of Social Security benefits in IRS publication 915, available at <http://www.irs.gov/pub/irs-pdf/p915.pdf>.

NOTE: ... = not applicable.

- a. Adjusted gross income (before Social Security or Railroad Retirement benefits are considered), plus tax-exempt interest income, with further modification of adjusted gross income in some cases involving certain tax provisions of limited applicability among the beneficiary population.
- b. Social Security and Tier 1 Railroad Retirement benefits, including workers' compensation benefits to the extent they cause a reduction in either of these two types of benefits.
- c. For married couples filing joint returns, up to 50 percent of benefits are subject to income tax if gross income is more than \$32,000 but less than \$44,000. If gross income is less than \$32,000, none of the Social Security benefits will be taxable. If gross income exceeds \$44,000, up to 85 percent of Social Security benefits will be taxable income. Similar lower and upper level thresholds or "base amounts" for single individuals are \$25,000 and \$34,000. There is no similar threshold or base amount for married individuals who live together but file separate returns (for example, up to 85 percent of Social Security benefits in those cases may be considered taxable income).
- d. Includes only married taxpayers filing separately who lived with their spouse at any time during the tax year; married individuals filing separately who did not live with their spouse are treated the same as unmarried individuals.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

2.B Other Programs: SSI

Table 2.B1—Federal benefit rates, by living arrangement, 1974–2010

Act	Effective date	Amount ^a (dollars)	
		Individual	Couple
<i>Own household ^b</i>			
1972	January 1, 1974 ^c	130.00	195.00
1973	January 1, 1974	140.00	210.00
1973	July 1, 1974	146.00	219.00
1974 ^d	July 1, 1975	157.70	236.60
	July 1, 1976	167.80	251.80
	July 1, 1977	177.70	266.70
	July 1, 1978	189.40	284.10
	July 1, 1979	208.20	312.30
	July 1, 1980	238.00	357.00
	July 1, 1981	264.70	397.00
1983	July 1, 1982	284.30	426.40
	July 1, 1983 ^e	304.30	456.40
	January 1, 1984	314.00	472.00
	January 1, 1985	325.00	488.00
	January 1, 1986	336.00	504.00
	January 1, 1987	340.00	510.00
	January 1, 1988	354.00	532.00
	January 1, 1989	368.00	553.00
	January 1, 1990	386.00	579.00
	January 1, 1991	407.00	610.00
	January 1, 1992	422.00	633.00
	January 1, 1993	434.00	652.00
	January 1, 1994	446.00	669.00
	January 1, 1995	458.00	687.00
	January 1, 1996	470.00	705.00
	January 1, 1997	484.00	726.00
	January 1, 1998	494.00	741.00
	January 1, 1999	500.00	751.00
	January 1, 2000	^f 513.00	769.00
	January 1, 2001	^f 531.00	796.00
January 1, 2002	545.00	817.00	
January 1, 2003	552.00	829.00	
January 1, 2004	564.00	846.00	
January 1, 2005	579.00	869.00	
January 1, 2006	603.00	904.00	
January 1, 2007	623.00	934.00	
January 1, 2008	637.00	956.00	
January 1, 2009	674.00	1,011.00	
January 1, 2010	674.00	1,011.00	

(Continued)

Table 2.B1—Federal benefit rates, by living arrangement, 1974–2010—Continued

Act	Effective date	Amount ^a (dollars)	
		Individual	Couple
<i>Receiving institutional care covered by Medicaid ^g</i>			
1972	January 1, 1974	25.00	50.00
1987	July 1, 1988	30.00	60.00

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2009; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, Office of the Chief Actuary, "SSI Federal Payment Amounts," <http://www.socialsecurity.gov/OACT/COLA/SSlamts.html>.

NOTE: For those in another person's household receiving support and maintenance there, the federal benefit rate is reduced by one-third.

- a. For those without countable income. These payments are reduced by the amount of countable income of the individual or couple.
- b. Includes persons in private institutions whose care is not provided by Medicaid.
- c. Superseded by the provision of 1973.
- d. Mechanism established for providing cost-of-living adjustments.
- e. General benefit increase.
- f. Benefits originally paid in 2000 and through July 2001 were based on federal benefit rates of \$512 and \$530, respectively. Pursuant to Public Law 106-554, monthly payments beginning in August 2001 were effectively based on the higher \$531 amount. Lump-sum compensation payments were made on the basis of an adjusted benefit rate for months prior to August 2001.
- g. Must be receiving more than 50 percent of the cost of the care from Medicaid (Title XIX of the Social Security Act).

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2.C Other Programs: Medicare

Table 2.C1—Medicare cost sharing and premium amounts, 1966–2011 ^a

Effective date ^b	Hospital Insurance (Medicare Part A)				Supplementary Medical Insurance (Medicare Parts B and D)										
	All expenses in "benefit period" covered except—				Monthly premium ^d (dollars)	Part B					Part D ^c				
						Annual deductible ^e (dollars)	Coinsurance ^e (percent)	Monthly premium (dollars)		Annual deductible ^f (dollars)	Initial coverage limit ^f (dollars)	Out-of-pocket threshold ^f (dollars)	Base beneficiary monthly premium ^g (dollars)		
	For enrollee ^h (aged and disabled)	Government amounts for—													
Inpatient hospital deductible (IHD) covers first 60 days (dollars)		Inpatient hospital daily coinsurance Days 61 through 90 (1/4 x IHD) (dollars)	Lifetime reserve days after 90 (1/2 x IHD) (dollars)	Skilled nursing facility daily coinsurance for days 21 through 100 (1/8 x IHD) (dollars)				Aged	Disabled						
1966	40	10	...	...	...	50	20	3.00	3.00	...	...	...	...	...
1967	40	10	...	5.00	...	50	20	3.00	3.00	...	...	...	...	...
1968	40	10	20	5.00	...	ⁱ 50	ⁱ 20	^j 4.00	^j 4.00	...	...	...	...	...
1969	44	11	22	5.50	...	50	20	4.00	4.00	...	...	...	...	...
1970	52	13	26	6.50	...	50	20	5.30	5.30	...	...	...	...	...
1971	60	15	30	7.50	...	50	20	5.60	5.60	...	...	...	...	...
1972	68	17	34	8.50	...	50	^k 20	5.80	5.80	...	...	...	...	...
1973	72	18	36	9.00	33	60	20	^l 6.30	6.30	22.70	...	...	...	...
1974	84	21	42	10.50	36	60	20	6.70	6.70	29.30	...	...	...	...
1975	92	23	46	11.50	40	60	20	6.70	8.30	30.30	...	...	...	...
1976	104	26	52	13.00	45	60	20	7.20	14.20	30.80	...	...	...	...
1977	124	31	62	15.50	54	60	20	7.70	16.90	42.30	...	...	...	...
1978	144	36	72	18.00	63	60	20	8.20	18.60	41.80	...	...	...	...
1979	160	40	80	20.00	69	60	20	8.70	18.10	41.30	...	...	...	...
1980	180	45	90	22.50	78	60	20	9.60	23.00	41.40	...	...	...	...
1981	204	51	102	25.50	89	^{m,n} 60	ⁿ 20	11.00	34.20	62.20	...	...	...	...
1982	260	65	130	32.50	113	^o 75	^o 20	12.20	37.00	72.00	...	...	...	...
1983	304	76	152	38.00	113	75	20	12.20	41.80	80.00	...	...	...	...
1984	356	89	178	44.50	155	75	20	14.60	43.80	94.00	...	...	...	...
1985	400	100	200	50.00	174	75	20	15.50	46.50	89.90	...	...	...	...
1986	492	123	246	61.50	214	75	20	15.50	46.50	66.10	...	...	...	...
1987	520	130	260	65.00	226	75	20	17.90	53.70	88.10	...	...	...	...
1988	540	135	270	67.50	234	75	20	24.80	74.40	72.40	...	...	...	...
1989	^p 560	^p	^p	^q 25.50	156	75	20	^r 31.90	83.70	40.70	...	...	...	...
1990	592	148	296	74.00	175	75	20	28.60	85.80	59.60	...	...	...	...
1991	628	157	314	78.50	177	100	20	29.90	95.30	82.10	...	...	...	...
1992	652	163	326	81.50	192	100	20	31.80	89.80	129.80	...	...	...	...
1993	676	169	338	84.50	221	100	20	36.60	104.40	129.20	...	...	...	...
1994	696	174	348	87.00	245	100	20	41.10	82.50	111.10	...	...	...	...
1995	716	179	358	89.50	261	100	20	46.10	100.10	165.50	...	...	...	...
1996	736	184	368	92.00	289	100	20	42.50	127.30	167.70	...	...	...	...
1997	760	190	380	95.00	311	100	20	43.80	131.40	177.00	...	...	...	...
1998	764	191	382	95.50	309	100	20	43.80	132.00	150.40	...	...	...	...
1999	768	192	384	96.00	309	100	20	45.50	139.10	160.50	...	...	...	...
2000	776	194	388	97.00	301	100	20	45.50	138.30	196.70	...	...	...	...
2001	792	198	396	99.00	300	100	20	50.00	152.00	214.40	...	...	...	...
2002	812	203	406	101.50	319	100	20	54.00	164.60	192.20	...	...	...	...
2003	840	210	420	105.00	316	100	20	58.70	178.70	223.30	...	...	...	...
2004	876	219	438	109.50	343	100	20	66.60	199.80	284.40	^s	^s	^s	^s	

(Continued)

Table 2.C1—Medicare cost sharing and premium amounts, 1966–2011 ^a—Continued

Effective date ^b	Hospital Insurance (Medicare Part A)				Supplementary Medical Insurance (Medicare Parts B and D)									
	All expenses in "benefit period" covered except—				Part B					Part D ^c				
					Monthly premium ^d (dollars)	Annual deductible ^e (dollars)	Coinsurance ^e (percent)	Monthly premium (dollars)		Annual deductible ^f (dollars)	Initial coverage limit ^f (dollars)	Out-of-pocket threshold ^f (dollars)	Base beneficiary monthly premium ^g (dollars)	
	Inpatient hospital deductible (IHD) covers first 60 days (dollars)	Government amounts for—												
Inpatient hospital daily coinsurance		Skilled nursing facility daily coinsurance for days 21 through 100 (1/8 x IHD) (dollars)	For enrollee ^h (aged and disabled)	Aged				Disabled						
	Days 61 through 90 (1/4 x IHD) (dollars)	Lifetime reserve days after 90 (1/2 x IHD) (dollars)												
2005	912	228	456	114.00	375	110	20	78.20	234.60	305.40	^s	^s	^s	^s
2006	952	238	476	119.00	393	124	20	88.50	265.30	318.90	250	2,250	^t 3,600	32.20
2007	992	248	496	124.00	410	131	20	^u 93.50	^v 280.50	^v 301.10	265	2,400	^t 3,850	27.35
2008	1,024	256	512	128.00	423	135	20	^u 96.40	^v 289.00	^v 323.00	275	2,510	^t 4,050	27.93
2009	1,068	267	534	133.50	443	135	20	^u 96.40	^v 289.00	^v 352.00	295	2,700	^t 4,350	30.36
2010	1,100	275	550	137.50	461	155	20	^{u,w} 110.50	^v 331.50	^v 430.30	310	2,830	^t 4,550	31.94
2011	1,132	283	566	141.50	450	162	20	^{u,x} 115.40	^v 346.00	^v 417.20	310	2,840	^t 4,550	^y 32.34

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: The structure of Medicare has become increasingly complex over the years. This table provides a summary of Medicare cost sharing and premium provisions. It should be used as an overview and general guide. It is not intended to explain fully all of the provisions or exclusions of the applicable Medicare laws, regulations, and rulings. Original sources of authority should be consulted for specific details.

Values for certain 2011 premiums, copayments, and out-of-pocket thresholds not shown in the table are provided in footnotes as applicable. Corresponding values for prior years are available in previous editions of this table.

... = not applicable.

- a. As of November 1, 2010.
- b. Deductible and coinsurance amounts begin in January unless otherwise noted. Monthly premium amounts took effect in July through 1983 and in January beginning in 1984.
- c. Enrollment in Part D is voluntary. Substantial premium and cost-sharing subsidies and waivers are available for Part D beneficiaries who meet certain low-income and limited-resources criteria. Subsidy levels vary.
- d. Standard premium rate for voluntary enrollment by certain aged and disabled individuals not otherwise entitled to Hospital Insurance (HI). (Most individuals aged 65 and older and many disabled individuals under age 65 are insured for HI benefits without payment of any premium.) Beginning in 1994, a reduced premium is available to premium-paying HI enrollees with at least 30 quarters of Medicare-covered employment (either their own or through a current or former spouse if the marriage meets certain duration criteria). In most cases, a surcharge applies for beneficiaries who enroll after their initial enrollment period.
- e. Most services under Part B are subject to the annual deductible and coinsurance percentages shown. Some noteworthy exceptions are footnoted; others include (1) clinical lab tests, home health agency services, and certain prescribed preventive care services, which are not subject to the deductible or coinsurance and for which the beneficiary pays nothing; (2) outpatient psychiatric services, for which the coinsurance is 50 percent but phases down to 20 percent over the 5-year period 2010–2014; and (3) most services reimbursed under the outpatient hospital prospective payment system, for which the coinsurance percentage varies by service but currently falls in the range of 20 percent to 50 percent.
- f. Under the standard Part D benefit design, the beneficiary pays an initial deductible and 25 percent of the remaining costs until reaching the initial coverage limit. Between the initial coverage limit and the out-of-pocket threshold is a "coverage gap." Beneficiaries in the coverage gap paid the full cost of their prescription drugs from 2006 to 2009. For 2010, beneficiaries in the coverage gap (excluding those low-income enrollees eligible for cost-sharing subsidies) received a \$250 rebate, and for 2011, these beneficiaries will receive a 50-percent discount on covered brand-name prescription drugs and a 7-percent discount on covered generic drugs. In determining out-of-pocket costs, costs reimbursed through insurance are not counted toward the out-of-pocket threshold, except for cost-sharing assistance provided to low-income enrollees by Part D and State Pharmacy Assistance programs and, starting in 2011, the 50-percent discount on brand-name drugs purchased by enrollees in the Part D coverage gap. For costs incurred after the out-of-pocket threshold is reached, "catastrophic coverage" requires enrollees to pay the greater of a 5-percent coinsurance or a small copayment (for 2011, \$2.50 for generic or preferred multi-source drugs and \$6.30 for other drugs). Many Part D plans differ from this standard coverage design; in fact, the majority of beneficiaries are enrolled in plans with low or no deductibles, flat payments for covered drugs, and, in some cases, additional partial coverage in the coverage gap.
- g. The Part D premiums paid by individual beneficiaries equal the base beneficiary premium adjusted by a number of factors. Premiums vary significantly from one plan to another and seldom equal the base beneficiary premium. The estimated average monthly premium for 2011, as calculated and announced prior to the start of the year (based on the bids submitted by Part D plans, the specific plan-by-plan premiums, and the estimated number of beneficiaries in each plan) is \$30. A surcharge for enrollment after the initial enrollment period may apply.
- h. Represents standard premium for voluntary enrollment in Part B. This is the amount paid by most beneficiaries in most years (2010 and 2011 are notable exceptions). Three factors can alter the premium paid by a beneficiary: enrollment after the initial enrollment period, for which a surcharge may apply; adjustments for beneficiaries whose income is above certain thresholds; and a "hold-harmless" provision that prohibits Part B premium increases that exceed the dollar amount of a beneficiary's Social Security cost-of-living adjustment. See also footnotes u, w, and x.
- i. Professional inpatient services of pathologists and radiologists not subject to deductible or coinsurance, beginning in April 1968.
- j. Beginning in April 1968.
- k. Home health services not subject to coinsurance, beginning in January 1973.
- l. Standard monthly premiums for July and August 1973 were reduced to \$5.80 and \$6.10, respectively, by the Cost of Living Council.
- m. Home health services not subject to deductible, beginning July 1, 1981.
- n. Professional inpatient services of pathologists and radiologists not subject to deductible or coinsurance, but only when physician accepts assignment.
- o. Effective October 1, 1982, professional inpatient services of pathologists and radiologists are subject to deductible and coinsurance.

2.C Other Programs: Medicare

Table 2.C1—Medicare cost sharing and premium amounts, 1966–2011 ^a—Continued

- p. The 1989 deductible was applied on an annual basis rather than a benefit-period basis. Once the beneficiary paid the deductible, Medicare paid the balance of expenses for covered hospital services, regardless of the number of days of hospitalization (except for psychiatric hospital care, which was still limited to 190 days).
- q. In 1989 the coinsurance amount was equal to 20 percent of the estimated national average daily cost of covered skilled nursing facility care, the beneficiary paid the coinsurance amount for the first 8 days of care during the year, and benefits were available for up to 150 days of care during the year.
- r. Includes the standard monthly Part B premium and a supplemental monthly flat premium under the Medicare Catastrophic Coverage Act of 1988. Persons enrolled in Part B only and residents of Puerto Rico and other territories and commonwealths paid lower supplemental flat premiums.
- s. A temporary Medicare-endorsed prescription drug discount card program was offered. See the Medicare section of "Program Descriptions and Legislative History" (page 54 in this Supplement).
- t. The 2011 out-of-pocket threshold of \$4,550 is equivalent to total covered drug costs ranging from \$6,447.50 to \$6,719.03, depending on the percentage of brand-name versus generic drugs used by the beneficiary while in the coverage gap. See previous editions of this table for prior years' equivalent total covered drug costs.
- u. See footnote h. The 2011 Part B income-related monthly adjustment amounts and total monthly premium amounts to be paid by beneficiaries, according to income level and filing status, are shown in the Medicare section of "Program Descriptions and Legislative History" (page 41 in this Supplement).
- v. For beneficiaries paying an income-related adjustment, the government amounts are to be reduced accordingly. See also footnotes h and u.
- w. Most Part B enrollees are protected by a "hold-harmless" provision prohibiting Part B premium increases that exceed the dollar amount of an individual's Social Security cost-of-living adjustment (COLA). Because the 2010 COLA equaled 0 percent, about 73 percent of Part B enrollees continued to pay the 2009 premium amount in 2010.
- x. See footnote w. Because the 2011 COLA again equals 0 percent, most Part B enrollees will continue to pay the same premium amount they paid in 2010.
- y. See footnote g. The 2011 Part D income-related monthly adjustment amounts to be paid by beneficiaries, according to income level and filing status, are shown in the Medicare section of "Program Descriptions and Legislative History" (page 42 in this Supplement).

CONTACT: John Shatto (410) 786-0706 or supplement@ssa.gov.

Table 2.C2—Federal medical assistance percentage and enhanced federal medical assistance percentage, by state or other area, 2009–2011

State or area	Federal medical assistance percentage ^a			Enhanced federal medical assistance percentage ^b		
	2009 ^c	2010 ^d	2011 ^e	2009 ^c	2010 ^d	2011 ^e
Alabama	67.98	68.01	68.54	77.59	77.61	77.98
Alaska	50.53	51.43	50.00	65.37	66.00	65.00
Arizona	65.77	65.75	65.85	76.04	76.03	76.10
Arkansas	72.81	72.78	71.37	80.97	80.95	79.96
California	50.00	50.00	50.00	65.00	65.00	65.00
Colorado	50.00	50.00	50.00	65.00	65.00	65.00
Connecticut	50.00	50.00	50.00	65.00	65.00	65.00
Delaware	50.00	50.21	53.15	65.00	65.15	67.21
District of Columbia ^f	70.00	70.00	70.00	79.00	79.00	79.00
Florida	55.40	54.98	55.45	68.78	68.49	68.82
Georgia	64.49	65.10	65.33	75.14	75.57	75.73
Hawaii	55.11	54.24	51.79	68.58	67.97	66.25
Idaho	69.77	69.40	68.85	78.84	78.58	78.20
Illinois	50.32	50.17	50.20	65.22	65.12	65.14
Indiana	64.26	65.93	66.52	74.98	76.15	76.56
Iowa	62.62	63.51	62.63	73.83	74.46	73.84
Kansas	60.08	60.38	59.05	72.06	72.27	71.34
Kentucky	70.13	70.96	71.49	79.09	79.67	80.04
Louisiana	71.31	67.61	63.61	79.92	77.33	74.53
Maine	64.41	64.99	63.80	75.09	75.49	74.66
Maryland	50.00	50.00	50.00	65.00	65.00	65.00
Massachusetts	50.00	50.00	50.00	65.00	65.00	65.00
Michigan	60.27	63.19	65.79	72.19	74.23	76.05
Minnesota	50.00	50.00	50.00	65.00	65.00	65.00
Mississippi	75.84	75.67	74.73	83.09	82.97	82.31
Missouri	63.19	64.51	63.29	74.23	75.16	74.30
Montana	68.04	67.42	66.81	77.63	77.19	76.77
Nebraska	59.54	60.56	58.44	71.68	72.39	70.91
Nevada	50.00	50.16	51.61	65.00	65.11	66.13
New Hampshire	50.00	50.00	50.00	65.00	65.00	65.00
New Jersey	50.00	50.00	50.00	65.00	65.00	65.00
New Mexico	70.88	71.35	69.78	79.62	79.95	78.85
New York	50.00	50.00	50.00	65.00	65.00	65.00
North Carolina	64.60	65.13	64.71	75.22	75.59	75.30
North Dakota	63.15	63.01	60.35	74.21	74.11	72.25
Ohio	62.14	63.42	63.69	73.50	74.39	74.58
Oklahoma	65.90	64.43	64.94	76.13	75.10	75.46
Oregon	62.45	62.74	62.85	73.72	73.92	74.00
Pennsylvania	54.52	54.81	55.64	68.16	68.37	68.95
Rhode Island	52.59	52.63	52.97	66.81	66.84	67.08
South Carolina	70.07	70.32	70.04	79.05	79.22	79.03
South Dakota	62.55	62.72	61.25	73.79	73.90	72.88
Tennessee	64.28	65.57	65.85	75.00	75.90	76.10
Texas	59.44	58.73	60.56	71.61	71.11	72.39
Utah	70.71	71.68	71.13	79.50	80.18	79.79
Vermont	59.45	58.73	58.71	71.62	71.11	71.10
Virginia	50.00	50.00	50.00	65.00	65.00	65.00
Washington	50.94	50.12	50.00	65.66	65.08	65.00
West Virginia	73.73	74.04	73.24	81.61	81.83	81.27
Wisconsin	59.38	60.21	60.16	71.57	72.15	72.11
Wyoming	50.00	50.00	50.00	65.00	65.00	65.00

(Continued)

2.C Other Programs: Medicaid

Table 2.C2—Federal medical assistance percentage and enhanced federal medical assistance percentage, by state or other area, 2009–2011—Continued

State or area	Federal medical assistance percentage ^a			Enhanced federal medical assistance percentage ^b		
	2009 ^c	2010 ^d	2011 ^e	2009 ^c	2010 ^d	2011 ^e
Outlying areas						
American Samoa ^g	50.00	50.00	50.00	65.00	65.00	65.00
Guam ^g	50.00	50.00	50.00	65.00	65.00	65.00
Northern Mariana Islands ^g	50.00	50.00	50.00	65.00	65.00	65.00
Puerto Rico ^g	50.00	50.00	50.00	65.00	65.00	65.00
U.S. Virgin Islands ^g	50.00	50.00	50.00	65.00	65.00	65.00

SOURCE: Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation.

- Section 1905(b) of the Social Security Act (the Act) specifies the method to be used to compute the federal medical assistance percentage. From this section the following formula is derived: $N = 3\text{-year average national per capita personal income}$; $S = 3\text{-year average state per capita personal income}$. Federal medical assistance percentage: $\text{State share} = (S^2/N^2) \times 45$ or $(45/N^2) \times S^2$; $\text{Federal share} = 100 - \text{state share}$ with 50–83 percent limits.
- This is the Title XXI enhanced federal medical assistance percentage rate specified in section 2105(b) of the Act. The enhanced federal medical assistance percentage cannot exceed 85 percent.
- Effective October 1, 2008, through September 30, 2009.
- Effective October 1, 2009, through September 30, 2010.
- Effective October 1, 2010, through September 30, 2011.
- The values for the District of Columbia (DC) in the table were set for the state plan under titles XIX and XXI and for capitation payments and Disproportionate Share Hospital (DSH) allotments under those titles. For other purposes, including programs remaining in Title IV of the Act, the percentage for DC is 50.00.
- For purposes of section 1118 of the Social Security Act, the federal medical assistance percentage used under titles I, X, XIV, and XVI, and part A of title IV will be 75 percent.

CONTACT: Thomas Musco (202) 690-6870 or supplement@ssa.gov.

Table 2.F1—Number of SSA offices, 2009

Office	Number
Headquarters (Baltimore, Maryland)	1
Regional offices ^a	10
Area Offices	54
Field offices ^b	1,297
Level 1	621
Level 2	637
Resident stations	31
Social Security Card Centers ^c	8
Teleservice centers	33
Program service centers ^d	6
Data operations center ^e	1
Office of Disability Adjudication and Review	
Headquarters (Falls Church, Virginia)	1
Regional offices	10
Hearing offices	140
Satellite offices	4

SOURCES: Social Security Administration, Office of Public Service and Operations Support's database and Office of Disability Adjudication and Review's Case Control System.

- a. Regional offices are located in Boston, Massachusetts; New York, New York; Philadelphia, Pennsylvania; Atlanta, Georgia; Chicago, Illinois; Dallas, Texas; Kansas City, Missouri; Denver, Colorado; San Francisco, California; and Seattle, Washington.
- b. Field offices are designated as level 1, level 2, or resident stations depending on the characteristics of the facility, service area, and other conditions.
- c. Social Security Card Centers are located in Queens, New York; Brooklyn, New York; Orlando, Florida; Minneapolis, Minnesota; North Phoenix, Arizona; Downtown Phoenix, Arizona; Las Vegas, Nevada; and Sacramento, California.
- d. Program service centers are located in Jamaica, New York; Philadelphia, Pennsylvania; Birmingham, Alabama; Chicago, Illinois; Kansas City, Missouri; and Richmond, California.
- e. The data operations center is located in Wilkes-Barre, Pennsylvania.

CONTACT: Kristy Brumfield for SSA data (410) 966-9785 and Amy Prether for Office of Disability Adjudication and Review data (703) 605-7160 or supplement@ssa.gov.

2.F SSA Administrative Data: Offices and Staff

Table 2.F2—Number of SSA employees and percentage with selected characteristics by grade, September 30, 2009

Characteristic	All grade levels	GS 1–4	GS 5–8	GS 9–12	GS 13–15	SES
	<i>Number</i>					
Total ^a	66,478	393	20,593	33,500	10,228	152
	<i>Percentage of total</i>					
Women	68.8	66.4	74.9	71.6	55.3	43.4
Minorities	48.7	55.2	57.9	49.3	33.3	26.3
Black	28.6	42.5	35.1	27.6	21.3	17.1
Hispanic	13.7	8.1	16.4	14.6	6.9	6.6
Asian/Pacific Islander	5.1	4.1	5.0	5.6	4.0	0.7
American Indian/Alaska Native	1.4	0.5	1.4	1.4	1.1	2.0
Employees with targeted disabilities	2.0	14.2	3.5	1.4	0.9	0.7

SOURCE: Social Security Administration's Human Resources Management Information System.

a. Includes all full-time and part-time permanent employees.

CONTACT: David V. Smith (410) 966-9424 or supplement@ssa.gov.

Table 2.F3—Number of work years, fiscal years 1995–2009

Year	Full-time permanent staff ^a	Total work years ^b
1995	62,504	67,063
1996	62,133	66,726
1997	61,224	69,378
1998	59,943	67,210
1999	59,752	66,459
2000	60,434	65,521
2001	61,490	65,562
2002	61,914	65,742
2003	63,569	65,343
2004	63,186	^c 66,154
2005	63,696	^d 68,026
2006	61,692	66,878
2007	60,206	63,939
2008	61,920	64,358
2009	65,203	67,170

SOURCE: Social Security Administration's Payroll Reports.

a. On duty at end of fiscal year; includes seasonal employees.

b. Includes full-time, part-time, and temporary employees; employees in special programs; and overtime hours worked.

c. Includes 178 work years for activities related to Medicare Modernization Act.

d. Includes 1,962 work years for Medicare Modernization Act.

CONTACT: Shannon Smith (410) 965-0031 or supplement@ssa.gov.

2.F SSA Administrative Data: Claims Workloads

Table 2.F4—Number of Old-Age and Survivors Insurance claims, fiscal year 2009 (in thousands)

Workload	Total	Worker	Family members and survivors
Received	4,726.2	3,124.6	1,601.6
Processed ^a	4,742.2	3,120.4	1,621.8

SOURCE: Social Security Administration, Office of Systems, Integrated Work Measurement System.

NOTE: Beginning and ending pending totals are no longer reported effective with 2005.

a. See Table 6.A1 for data on number of awards.

CONTACT: Kelli Schafer (410) 966-8673 or supplement@ssa.gov.

Table 2.F5—Number of Disability Insurance claims, fiscal year 2009 (in thousands)

Workload	Total	Worker	Family members and survivors
Received	3,207.8	2,902.0	305.8
Processed ^a	3,081.4	2,772.5	308.9

SOURCE: Social Security Administration, Office of Systems, Integrated Work Measurement System.

NOTE: Beginning and ending pending totals are no longer reported effective with 2005.

a. See Table 6.A1 for data on number of awards.

CONTACT: Kelli Schafer (410) 966-8673 or supplement@ssa.gov.

Table 2.F6—Number of Supplemental Security Income claims, fiscal year 2009 (in thousands)

Workload	Total	Aged	Blind or disabled
Received	3,062.9	321.0	2,741.9
Processed ^a	2,888.5	320.0	2,568.5

SOURCE: Social Security Administration, Office of Systems, Integrated Work Measurement System.

NOTE: Beginning and ending pending totals are no longer reported effective with 2005.

a. See Table 7.A8 for data on number of awards.

CONTACT: Kelli Schafer (410) 966-8673 or supplement@ssa.gov.

2.F SSA Administrative Data: Service Delivery

Table 2.F7—Accuracy rates and use of 800 telephone number, fiscal years 2005–2009

Item	2005	2006	2007	2008	2009
<i>Accuracy rates (percent)</i>					
OASI payments					
Payment review/stewardship results					
Excess payments	99.9	99.8	99.9	99.8	99.8
Underpayments	99.9	99.9	99.9	99.9	99.9
SSI payments					
Payment review/stewardship results					
Excess payments	93.6	92.1	90.9	89.7	91.6
Underpayments	98.6	97.8	98.5	98.3	98.4
Disability Insurance benefits ^a					
Initial claims	92.0	93.4	93.8	94.4	94.9
Allowances	90.2	96.1	96.5	97.7	98.0
Denials	93.5	92.0	92.3	92.5	93.0
Reconsideration of denials	91.1	91.2	91.9	92.1	94.3
Reversals	95.4	96.2	97.5	97.8	97.9
Affirmations	90.3	90.5	91.0	91.2	93.7
<i>National 800 number network (1-800-772-1213) ^b</i>					
Network calls received (millions)	84.5	91.8	79.9	82.6	85.7
Average wait for live agent service (minutes)	5.0	4.6	4.2	5.4	4.1

SOURCES: Social Security Administration, Office of Quality Performance and Office of Central Operations, Office of Telephone Services.

- a. Represents cases free of decisional and documentation errors.
- b. Data for 2005–2007 may not match those in previous editions of this table because of the introduction in 2008 of new measurements of call volume and processing time.

CONTACT: Martha Takla (410) 966-3888, Roy Harper (410) 966-5997, or supplement@ssa.gov.

2.F SSA Administrative Data: Hearings and Appeals

Table 2.F8—Workload of SSA’s Administrative Law Judges (ALJs), fiscal years 2007–2009

Item	2007	2008	2009
Number of ALJs	1,006	960	1,057
Average monthly hearing dispositions per ALJ	45	^a 48	49
Average hearings pending per ALJ	702	643	575

SOURCES: Social Security Administration, Office of Disability Adjudication and Review. Actual data from the Key Workload Indicator Report.

NOTE: Number of ALJs and average monthly hearing dispositions per ALJ based on ALJ availability; average hearings pending per ALJ based on ALJs on duty. Data exclude Regional Chief ALJs.

a. Excludes 24,575 Attorney Adjudicator decisions.

CONTACT: Joseph Darr (703) 605-8516 or supplement@ssa.gov.

Table 2.F9—Number of hearing level receipts, dispositions, and end-of-year pending cases, fiscal years 2008–2009

Program	Hearing level receipts		Hearing level dispositions		End-of-year pending cases	
	2008	2009	2008	2009	2008	2009
Total	589,449	622,851	575,380	660,842	760,813	722,822
OASI	1,877	2,047	2,261	2,051	1,608	1,596
Disability						
DI	203,429	193,020	199,989	228,225	246,562	210,470
SSI	156,415	173,210	147,349	168,887	205,337	209,318
DI and SSI	227,729	254,574	225,781	261,679	307,306	301,438
Medicare (Parts A and B and adversarial)	0	0	0	0	0	0
Black Lung	0	0	0	0	0	0

SOURCES: Social Security Administration, Office of Disability Adjudication and Review. Actual data from the Case Processing and Management System and Key Workload Indicator Report.

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Table 2.F11—Number of SSA Appeals Council cases, fiscal years 2007–2009

Cases	2007	2008	2009
Beginning-of-year pending	44,032	53,163	62,210
Receipts	96,260	^a 92,454	106,965
Dispositions	87,129	83,407	89,066
End-of-year pending	53,163	^a 62,210	80,040

SOURCES: Social Security Administration, Office of Disability Adjudication and Review. Actual data from the Appeals Review Processing System and Key Workload Indicator Report.

a. Revised.

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Social Welfare and the Economy

Employment and Earnings 3.1

Interprogram Data 3.3

Poverty 3.13

Table 3.B3—Federal minimum wage rates under the Fair Labor Standards Act of 1938 and average hourly earnings and average weekly hours for production workers in manufacturing, selected years 1938–2010

Effective date	Minimum hourly wage for workers in jobs first covered by—				Production workers in manufacturing ^a	
	1938 act ^b (dollars)	1961 amendments ^c (dollars)	1966 and subsequent amendments ^d		Average gross hourly earnings (dollars)	Average weekly hours
			Nonfarm (dollars)	Farm (dollars)		
October 24 1938	0.25	...	...	...	0.62	35.6
1939	0.30	...	...	...	0.63	37.7
1945	0.40	...	...	...	1.02	43.5
January 25, 1950	0.75	...	...	...	1.44	40.5
March 1, 1956	1.00	...	...	...	1.95	40.4
September 3 1961	1.15	1.00	...	...	2.32	39.8
1963	1.25	1.00	...	...	2.46	40.5
1964	1.25	1.15	...	...	2.53	40.7
1965	1.25	1.25	...	...	2.61	41.2
February 1 1967	1.40	1.40	1.00	1.00	2.83	40.6
1968	1.60	1.60	1.15	1.15	3.01	40.7
1969	1.60	1.60	1.30	1.30	3.19	40.6
1970	1.60	1.60	1.45	1.30	3.36	39.8
1971	1.60	1.60	1.60	1.30	3.57	39.9
May 1, 1974	2.00	2.00	1.90	1.60	4.42	40.0
January 1 1975	2.10	2.10	2.00	1.80	4.83	39.5
1976	2.30	2.30	2.20	2.00	5.22	40.1
1977	2.30	2.30	2.30	2.20	5.68	40.3
1978	2.65	2.65	2.65	2.65	6.17	40.4
1979	2.90	2.90	2.90	2.90	6.70	40.2
1980	3.10	3.10	3.10	3.10	7.27	39.7
1981	3.35	3.35	3.35	3.35	7.99	39.8
1982	3.35	3.35	3.35	3.35	8.49	38.9
1983	3.35	3.35	3.35	3.35	8.83	40.1
1984	3.35	3.35	3.35	3.35	9.19	40.7
1985	3.35	3.35	3.35	3.35	9.54	40.5
1986	3.35	3.35	3.35	3.35	9.73	40.7
1987	3.35	3.35	3.35	3.35	9.91	41.0
1988	3.35	3.35	3.35	3.35	10.19	41.1
1989	3.35	3.35	3.35	3.35	10.48	41.0
April 1 1990 ^e	3.80	3.80	3.80	3.80	10.83	40.8
1991 ^e	4.25	4.25	4.25	4.25	11.18	40.7
1992 ^e	4.25	4.25	4.25	4.25	11.46	41.0
1993 ^e	4.25	4.25	4.25	4.25	11.74	41.4
1994	4.25	4.25	4.25	4.25	12.07	42.0
1995	4.25	4.25	4.25	4.25	12.37	41.6
October 1, 1996 ^e	4.75	4.75	4.75	4.75	12.77	41.6
September 1, 1997 ^e	5.15	5.15	5.15	5.15	13.17	42.0

(Continued)

3.B Employment and Earnings

Table 3.B3—Federal minimum wage rates under the Fair Labor Standards Act of 1938 and average hourly earnings and average weekly hours for production workers in manufacturing, selected years 1938–2010—Continued

Effective date	Minimum hourly wage for workers in jobs first covered by—				Production workers in manufacturing ^a	
	1938 act ^b (dollars)	1961 amendments ^c (dollars)	1966 and subsequent amendments ^d		Average gross hourly earnings (dollars)	Average weekly hours
			Nonfarm (dollars)	Farm (dollars)		
January 1						
1998 ^e	5.15	5.15	5.15	5.15	13.45	41.4
1999 ^e	5.15	5.15	5.15	5.15	13.85	41.4
2000 ^e	5.15	5.15	5.15	5.15	14.32	41.3
2001 ^e	5.15	5.15	5.15	5.15	14.76	40.3
2002 ^e	5.15	5.15	5.15	5.15	15.29	40.5
2003 ^e	5.15	5.15	5.15	5.15	15.74	40.4
2004 ^e	5.15	5.15	5.15	5.15	16.14	40.8
2005 ^e	5.15	5.15	5.15	5.15	16.56	40.7
2006 ^e	5.15	5.15	5.15	5.15	16.81	41.1
2007 ^{e,f}	5.85	5.85	5.85	5.85	17.26	41.2
2008 ^{e,g}	6.55	6.55	6.55	6.55	^h 17.75	40.8
2009 ^{e,i}	7.25	7.25	7.25	7.25	18.23	39.8
2010 ^e	7.25	7.25	7.25	7.25	--	--

SOURCE: Department of Labor, Bureau of Labor Statistics.

NOTE: . . . = not applicable; -- = not available.

- a. For year in which minimum wage rate changes were effective.
- b. The 1938 act was applicable generally to employees engaged in interstate commerce or in the production of goods for interstate commerce.
- c. The 1961 amendments extended coverage primarily to employees in large retail and service trades as well as local transit, construction, and gasoline service station employees.
- d. The 1966 amendments extended coverage to state and local government employees of hospitals, nursing homes, and schools, and to employees of laundries, dry cleaners, large hotels and motels, restaurants, and farms. Subsequent amendments extended coverage to the remaining federal, state, and local employees not protected in 1966, to certain workers in retail and service trades previously exempted, and to certain domestic workers in private household employment.
- e. A training wage may be paid for a period of 90 days to an employee who has not attained age 20. The training wage was \$3.35 per hour effective April 1, 1990, and \$3.61 per hour effective April 1, 1991, through March 31, 1993. Effective October 1, 1996, the training wage is \$4.25 per hour.
- f. Effective July 24, 2007.
- g. Effective July 24, 2008.
- h. Revised data.
- i. Effective July 24, 2009.

CONTACT: Greg Diez (410) 965-0153 or supplement@ssa.gov.

Table 3.C3—Contributions to the Social Security and Medicare trust funds, by program and source, 2000–2009 (in millions of dollars)

Program and source	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Social Security trust funds										
Old-Age and Survivors Insurance ^a	432,976	453,354	468,107	468,574	486,726	520,706	550,414	578,069	590,121	590,321
Employer	200,431	210,659	215,897	217,675	223,311	241,018	253,705	265,753	272,060	269,586
Employee	198,736	207,999	215,039	216,222	222,118	239,163	251,813	263,856	269,956	267,440
Self-employed	22,216	22,793	24,262	22,179	26,703	26,682	29,269	31,269	32,540	33,366
Taxation of benefits	11,594	11,903	12,909	12,497	14,593	13,843	15,628	17,192	15,566	19,930
Disability Insurance ^a	71,812	75,743	78,202	78,386	81,287	87,150	92,038	96,636	98,879	98,820
Employer	33,971	35,759	36,655	36,962	37,922	40,929	43,081	45,127	46,199	45,783
Employee	33,701	35,312	36,503	36,716	37,720	40,614	42,760	44,804	45,841	45,418
Self-employed	3,420	3,861	4,114	3,764	4,534	4,534	4,967	5,312	5,526	5,664
Taxation of benefits	721	811	930	944	1,111	1,073	1,230	1,393	1,313	1,955
Medicare trust funds										
Hospital Insurance ^a	154,520	160,896	162,650	159,164	166,977	182,565	194,238	205,289	213,364	206,173
Employer	67,526	71,181	71,334	69,885	72,760	80,159	84,417	89,093	91,981	88,242
Employee	67,526	71,181	71,334	69,885	72,760	80,159	84,417	89,093	91,981	88,242
Self-employed	9,299	9,631	10,040	9,472	10,964	11,065	12,439	13,669	14,732	14,405
Voluntarily enrolled ^b	1,382	1,370	1,626	1,604	1,915	2,416	2,645	2,841	2,938	2,908
Taxation of benefits	8,787	7,533	8,316	8,318	8,577	8,765	10,319	10,593	11,733	12,376
Supplementary Medical Insurance ^{a,c}	20,555	22,764	25,066	27,402	31,435	37,535	42,853	46,773	50,232	56,040
Aged	17,892	19,905	21,610	23,546	26,737	31,722	36,346	39,676	42,335	47,433
Disabled	2,664	2,859	3,456	3,856	4,699	5,813	6,507	7,096	7,897	8,606

SOURCE: Department of the Treasury.

- a. Totals do not necessarily equal the sum of rounded components. Employment taxes depend on tax rates and, for the Old-Age and Survivors Insurance and Disability Insurance Trust Funds, wage bases (taxable maximums). (Beginning in 1994, no wage base applies to Medicare's Hospital Insurance program.) Employer and employee contributions differ by estimated amounts of employee tax overpayments and by employee tax on tips.
- b. Beginning in July 1973, aged ineligible may voluntarily enroll for HI.
- c. Includes premiums paid on behalf of eligibles by state governments under "buy-in" arrangements.

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3.C Interprogram Data

Table 3.C4—Average monthly amount of Social Security and Supplemental Security Income, December 1950–2009 (in current and 2009 dollars)

Year	Average monthly Social Security benefit in current-payment status				Average monthly Supplemental Security Income amount for—		Consumer Price Index ^a
	Retired workers		Widowed mother or father and 2 children		Aged recipients ^b		
	Current dollars	2009 dollars	Current dollars	2009 dollars	Current dollars	2009 dollars	
1950	43.86	378.77	93.90	810.92	43.05	371.78	25.0
1951	42.14	343.32	93.80	764.20	44.55	362.96	26.5
1952	49.25	398.24	106.00	857.13	48.80	394.60	26.7
1953	51.10	410.13	111.90	898.11	48.90	392.47	26.9
1954	59.14	478.21	130.50	1,055.24	48.70	393.80	26.7
1955	61.90	498.66	135.40	1,090.78	50.05	403.20	26.8
1956	63.09	493.52	141.00	1,102.97	53.25	416.55	27.6
1957	64.58	490.94	146.30	1,112.19	55.50	421.92	28.4
1958	66.35	495.67	151.70	1,133.29	56.95	425.45	28.9
1959	72.78	534.46	170.70	1,253.54	56.70	416.38	29.4
1960	74.04	536.42	188.00	1,362.05	58.90	426.73	29.8
1961	75.65	544.43	189.30	1,362.33	57.60	414.53	30.0
1962	76.19	541.10	190.70	1,354.35	61.55	437.13	30.4
1963	76.88	537.16	192.50	1,345.01	62.80	438.79	30.9
1964	77.57	536.77	193.40	1,338.30	63.65	440.45	31.2
1965	83.92	569.76	219.80	1,492.29	63.10	428.41	31.8
1966	84.35	553.53	221.90	1,456.18	68.05	446.57	32.9
1967	85.37	543.70	224.40	1,429.14	70.15	446.77	33.9
1968	98.86	601.24	257.10	1,563.60	69.55	422.98	35.5
1969	100.40	574.97	255.80	1,464.91	73.90	423.21	37.7
1970	118.10	640.65	291.10	1,579.11	77.65	421.22	39.8
1971	132.17	694.29	320.00	1,680.97	77.50	407.11	41.1
1972	162.35	824.74	383.10	1,946.15	79.95	406.15	42.5
1973	166.42	777.71	391.00	1,827.21	76.15	355.86	46.2
1974	188.21	782.94	438.40	1,823.71	91.06	378.80	51.9
1975	207.18	805.95	468.60	1,822.90	90.93	353.73	55.5
1976	224.86	834.15	503.40	1,867.42	94.37	350.08	58.2
1977	243.00	844.83	546.60	1,900.34	96.62	335.91	62.1
1978	263.20	839.36	591.90	1,887.61	100.43	320.28	67.7
1979	294.30	828.41	655.00	1,843.74	122.67	345.30	76.7
1980	341.40	854.09	759.20	1,899.32	128.20	320.72	86.3
1981	385.97	886.50	858.00	1,970.66	137.81	316.52	94.0
1982	419.30	927.53	885.50	1,958.81	145.69	322.28	97.6
1983	440.77	939.41	923.00	1,967.18	157.89	336.51	101.3
1984	460.57	944.32	948.30	1,944.33	157.88	323.71	105.3
1985	478.62	945.42	981.50	1,938.75	164.26	324.46	109.3
1986	488.44	954.34	994.00	1,942.12	173.66	339.30	110.5
1987	512.65	959.11	1,032.30	1,931.31	180.64	337.96	115.4
1988	536.77	961.73	1,070.40	1,917.84	188.23	337.25	120.5
1989	566.85	970.52	1,120.04	1,917.66	198.81	340.39	126.1
1990	602.56	972.29	1,177.70	1,900.34	212.66	343.15	133.8
1991	629.32	985.28	1,216.76	1,904.99	221.30	346.47	137.9
1992	652.64	992.99	1,252.40	1,905.52	227.39	345.97	141.9
1993	674.06	998.15	1,282.60	1,899.27	236.52	350.24	145.8
1994	697.34	1,005.72	1,328.40	1,915.84	242.54	349.80	149.7
1995	719.80	1,012.41	1,365.50	1,920.60	250.65	352.54	153.5
1996	744.96	1,014.10	1,450.60	1,974.68	260.75	354.96	158.6
1997	774.84	1,037.12	1,502.60	2,011.23	268.46	359.33	161.3
1998	779.69	1,027.06	1,537.70	2,025.56	277.45	365.48	163.9
1999	804.30	1,031.78	1,590.40	2,040.21	289.19	370.98	168.3

(Continued)

Table 3.C4—Average monthly amount of Social Security and Supplemental Security Income, December 1950–2009 (in current and 2009 dollars)—Continued

Year	Average monthly Social Security benefit in current-payment status				Average monthly Supplemental Security Income amount for—		Consumer Price Index ^a
	Retired workers		Widowed mother or father and 2 children		Aged recipients ^b		
	Current dollars	2009 dollars	Current dollars	2009 dollars	Current dollars	2009 dollars	
2000	844.48	1,047.83	1,675.40	2,078.84	299.69	371.86	174.0
2001	874.44	1,068.43	1,755.10	2,144.46	314.22	383.93	176.7
2002	895.00	1,068.16	1,812.10	2,162.70	330.04	393.90	180.9
2003	922.08	1,080.18	1,880.97	2,203.48	342.28	400.97	184.3
2004	954.89	1,083.35	1,952.80	2,215.50	350.53	397.68	190.3
2005	1,002.00	1,099.25	2,061.30	2,261.36	360.25	395.21	196.8
2006	1,044.40	1,117.37	2,146.70	2,296.69	373.05	399.12	201.8
2007	1,078.60	1,108.90	2,221.10	2,283.50	384.15	394.94	210.0
2008	1,152.90	1,184.16	2,371.80	2,436.12	393.46	404.13	210.2
2009	1,164.30	1,164.30	2,403.30	2,403.30	399.14	399.14	215.9

SOURCES: Social Security Administration, Master Beneficiary Record and Supplemental Security Record, 100 percent data.

- a. Data from Bureau of Labor Statistics, Consumer Price Index for All Urban Consumers (CPI-U) for all items (1982–1984 = 100).
b. Through 1973, data refer to Old-Age Assistance program. Beginning January 1974, the Supplemental Security Income program superseded the Old-Age Assistance program in the 50 states and the District of Columbia.

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3.C Interprogram Data

Table 3.C5—Population aged 65 or older receiving Social Security (OASDI) benefits, Supplemental Security Income (SSI) payments, or both, by state, December 1940–2009, selected years

Year and state	Population aged 65 or older receiving—						Persons receiving both OASDI and SSI as a percentage of—	
	OASDI		SSI ^a		OASDI and SSI, number per 1,000	OASDI, SSI, or both, number per 1,000	OASDI beneficiaries	SSI recipients
	Number per 1,000	State rank	Number per 1,000	State rank				
1940	7	...	217	...	1	223	14.3	0.5
1945	62	...	194	...	5	251	8.1	2.6
1950	164	...	224	...	22	366	12.6	9.8
1955	394	...	179	...	34	539	8.6	19.2
1960	616	...	141	...	41	716	6.6	28.5
1965	752	...	117	...	52	817	7.0	44.7
1970	855	...	104	...	63	896	7.4	60.4
1975	904	...	111	...	78	939	8.6	69.5
1980	914	...	87	...	61	941	6.7	70.2
1985	917	...	71	...	51	937	5.5	71.1
1990	924	...	66	...	46	944	4.9	69.2
1995	913	...	63	...	39	937	4.3	62.6
2000	911	...	57	...	34	934	3.7	59.1
2001	908	...	56	...	33	931	3.6	58.4
2002	901	...	56	...	32	924	3.6	57.8
2003	908	...	55	...	32	932	3.5	57.4
2004	926	...	54	...	31	950	3.3	57.0
2005	919	...	53	...	31	943	3.3	57.6
2006	919	...	53	...	30	942	3.3	57.1
2007	904	...	53	...	30	926	3.4	57.3
2008	898	...	52	...	30	921	3.3	56.8
2009								
United States	901	...	51	...	29	924	3.2	56.0
Alabama	927	28	47	13	36	938	3.9	76.7
Alaska	905	34	58	8	36	927	3.9	61.3
Arizona	843	49	29	29	17	855	2.0	58.4
Arkansas	934	22	40	18	32	942	3.4	80.8
California	841	50	130	1	64	907	7.6	49.2
Colorado	894	40	28	32	16	907	1.7	55.6
Connecticut	942	14	27	34	13	956	1.4	48.6
Delaware	923	31	20	41	12	931	1.3	61.1
District of Columbia	733	51	60	6	35	758	4.7	58.3
Florida	843	48	48	12	24	867	2.9	50.6
Georgia	903	36	49	11	34	918	3.7	68.4
Hawaii	885	43	45	15	23	908	2.6	50.7
Idaho	962	3	19	42	14	967	1.5	72.3
Illinois	899	38	37	21	17	920	1.8	44.2
Indiana	956	7	15	49	10	961	1.1	66.9
Iowa	963	2	16	48	11	968	1.1	70.3
Kansas	937	20	18	44	11	944	1.2	63.5
Kentucky	923	30	57	9	41	939	4.5	72.5
Louisiana	883	44	59	7	43	899	4.9	73.1
Maine	953	8	25	37	20	958	2.1	78.6
Maryland	862	47	36	25	17	881	1.9	46.7
Massachusetts	891	41	56	10	29	917	3.2	51.9
Michigan	958	6	28	31	16	970	1.6	55.4
Minnesota	937	18	27	35	12	953	1.2	43.0
Mississippi	928	26	70	3	55	943	6.0	78.9

(Continued)

Table 3.C5—Population aged 65 or older receiving Social Security (OASDI) benefits, Supplemental Security Income (SSI) payments, or both, by state, December 1940–2009, selected years—Continued

Year and state	Population aged 65 or older receiving—						Persons receiving both OASDI and SSI as a percentage of—	
	OASDI		SSI ^a		OASDI and SSI, number per 1,000	OASDI, SSI, or both, number per 1,000	OASDI beneficiaries	SSI recipients
	Number per 1,000	State rank	Number per 1,000	State rank				
2009 (cont.)								
Missouri	933	24	23	39	16	941	1.7	68.2
Montana	939	17	18	43	13	944	1.4	74.4
Nebraska	940	16	16	47	11	945	1.2	67.2
Nevada	905	35	33	26	19	919	2.1	56.7
New Hampshire	944	12	11	51	7	948	0.7	64.1
New Jersey	912	33	45	16	21	936	2.3	46.0
New Mexico	897	39	61	5	42	916	4.7	68.5
New York	868	46	89	2	43	914	5.0	48.3
North Carolina	943	13	38	20	28	952	3.0	75.2
North Dakota	951	11	17	46	12	955	1.3	71.5
Ohio	914	32	24	38	14	924	1.5	56.7
Oklahoma	934	23	30	28	22	942	2.3	72.9
Oregon	952	10	28	30	16	964	1.7	57.4
Pennsylvania	932	25	31	27	18	946	1.9	56.1
Rhode Island	937	19	47	14	29	955	3.1	61.3
South Carolina	927	27	36	23	28	936	3.0	75.9
South Dakota	961	4	26	36	16	970	1.7	63.8
Tennessee	936	21	39	19	29	946	3.1	73.5
Texas	890	42	65	4	44	911	4.9	67.1
Utah	881	45	17	45	9	889	1.0	51.3
Vermont	958	5	28	33	22	964	2.3	78.6
Virginia	900	37	36	24	21	915	2.3	58.1
Washington	925	29	37	22	14	948	1.5	38.5
West Virginia	941	15	41	17	28	954	3.0	68.6
Wisconsin	972	1	21	40	13	979	1.3	62.9
Wyoming	952	9	12	50	10	955	1.0	78.2

SOURCES: Social Security Administration, Master Beneficiary Record and Supplemental Security Record (Characteristic Extract Record format), and Census Bureau, 100 percent data.

NOTE: . . . = not applicable.

a. For 1940–1973, data refer to the Old-Age Assistance program. Beginning January 1974, the Supplemental Security Income program superseded the Old-Age Assistance program in the 50 states and the District of Columbia.

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3.C Interprogram Data

Table 3.C6—Number and percentage of Social Security (OASDI) beneficiaries also receiving federally administered Supplemental Security Income (SSI) payments, by type of OASDI benefit and SSI eligibility category, December 2009

Type of benefit	All OASDI beneficiaries	Number receiving SSI			Percentage of all OASDI beneficiaries		
		Total	Aged	Blind and disabled	Total	Aged	Blind and disabled
Total	52,522,819	2,624,290	656,338	1,967,952	5.0	1.2	3.7
Retirement	36,419,065	1,080,156	561,877	518,279	3.0	1.5	1.4
Workers aged 65 or older	30,380,083	799,397	500,152	299,245	2.6	1.6	1.0
Men	15,512,013	336,419	206,934	129,485	2.2	1.3	0.8
Women	14,868,070	462,978	293,218	169,760	3.1	2.0	1.1
Workers aged 62–64	3,133,930	44,801	0	44,801	1.4	0	1.4
Men	1,555,421	27,074	0	27,074	1.7	0	1.7
Women	1,578,509	17,727	0	17,727	1.1	0	1.1
Wives and husbands	2,343,601	132,075	61,707	70,368	5.6	2.6	3.0
Aged 65 or older	2,097,004	120,784	61,707	59,077	5.8	2.9	2.8
Aged 62–64	210,264	10,536	0	10,536	5.0	0	5.0
Under age 62 with children	36,333	755	0	755	2.1	0	2.1
Disabled adult children	241,042	99,816	18	99,798	41.4	^a	41.4
Aged 65 or older	1,298	561	18	543	43.2	1.4	41.8
Aged 18–64	239,744	99,255	0	99,255	41.4	0	41.4
Children under age 18 and students aged 18–19	320,409	4,067	0	4,067	1.3	0	1.3
Survivors	6,409,640	405,338	92,830	312,508	6.3	1.4	4.9
Nondisabled widow(er)s	4,090,496	175,568	90,575	84,993	4.3	2.2	2.1
Aged 65 or older	3,647,473	170,080	90,575	79,505	4.7	2.5	2.2
Aged 60–64	443,023	5,488	0	5,488	1.2	0	1.2
Disabled widow(er)s	236,480	35,586	22	35,564	15.0	^a	15.0
Widowed mothers and fathers	159,870	3,499	42	3,457	2.2	^a	2.2
Parents	1,646	74	66	8	4.5	4.0	0.5
Disabled adult children	589,575	168,007	2,125	165,882	28.5	0.4	28.1
Aged 65 or older	74,533	21,610	2,125	19,485	29.0	2.9	26.1
Aged 18–64	515,042	146,397	0	146,397	28.4	0	28.4
Children under age 18 and students aged 18–19	1,331,573	22,604	0	22,604	1.7	0	1.7
Disability	9,694,114	1,138,796	1,631	1,137,165	11.7	^a	11.7
Workers	7,788,013	1,005,564	418	1,005,146	12.9	^a	12.9
Men	4,100,400	422,638	187	422,451	10.3	^a	10.3
Women	3,687,613	582,926	231	582,695	15.8	^a	15.8
Wives and husbands	158,122	11,177	1,213	9,964	7.1	0.8	6.3
Aged 65 or older	38,033	4,518	1,213	3,305	11.9	3.2	8.7
Aged 62–64	47,143	2,484	0	2,484	5.3	0	5.3
Under age 62 with children	72,946	4,175	0	4,175	5.7	0	5.7
Disabled adult children aged 18–64	90,266	61,895	0	61,895	68.6	0	68.6
Children under age 18 and students aged 18–19	1,657,713	60,160	0	60,160	3.6	0	3.6

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

OASDI = Old-Age, Survivors, and Disability Insurance.

a. Less than 0.05 percent.

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Table 3.C6.1—Number of persons aged 18–64 receiving Social Security (OASDI) benefits or federally administered Supplemental Security Income (SSI) payments based on disability, by type of benefit, December 1978–2009

Year	Unduplicated total ^a	OASDI beneficiaries				Blind or disabled SSI recipients		
		Total	Disabled workers	Disabled adult children under age 65	Disabled widow(er)s	Total	Receiving SSI only	Receiving both SSI and OASDI
1978	4,676,450	3,415,469	2,879,774	405,944	129,751	1,747,126	^b 1,260,981	486,145
1979	4,662,528	3,419,624	2,870,590	419,201	129,833	1,726,553	^b 1,242,904	483,649
1980	4,662,546	3,418,434	2,858,680	432,174	127,580	1,730,847	^b 1,244,112	486,735
1981	4,570,071	3,340,701	2,776,519	442,592	121,590	1,702,895	^b 1,229,370	473,525
1982	4,366,314	3,169,449	2,603,599	449,478	116,372	1,655,279	^b 1,196,865	458,414
1983	4,367,241	3,143,111	2,569,029	462,491	111,591	1,699,774	^b 1,224,130	475,644
1984	4,460,188	3,183,618	2,596,516	477,951	109,151	1,780,459	^b 1,276,570	503,889
1985	4,591,316	3,258,200	2,656,638	494,557	107,005	1,879,168	^b 1,333,116	546,052
1986	4,812,143	3,346,603	2,728,463	511,166	106,974	2,010,458	^b 1,465,540	544,918
1987	4,904,785	3,416,529	2,785,859	524,388	106,282	2,118,710	^b 1,488,256	630,454
1988	5,012,435	3,468,186	2,830,284	534,779	103,123	2,202,714	1,544,249	658,465
1989	5,155,787	3,540,480	2,895,364	543,486	101,630	2,301,926	^c 1,615,307	686,619
1990	5,395,261	3,667,721	3,011,294	555,438	100,989	2,449,897	1,727,540	722,357
1991	5,743,614	3,877,804	3,194,938	568,377	114,489	2,641,524	1,865,810	775,714
1992	6,249,217	4,185,714	3,467,783	586,607	131,324	2,909,997	2,063,503	846,494
1993	6,707,127	4,476,648	3,725,966	603,667	147,015	3,148,413	2,230,479	917,934
1994	7,103,399	4,741,348	3,962,954	617,718	160,676	3,335,255	2,362,051	973,204
1995	7,398,942	4,987,004	4,185,263	628,717	173,024	3,482,256	2,411,938	1,070,318
1996	7,691,134	5,205,071	4,385,623	637,537	181,911	3,568,393	2,486,063	1,082,330
1997	7,818,216	5,340,082	4,508,134	644,010	187,938	3,561,625	2,478,134	1,083,491
1998	8,090,686	5,543,886	4,698,319	651,386	194,181	3,646,020	2,546,800	1,099,220
1999	8,311,949	5,736,071	4,879,455	657,821	198,795	3,690,970	2,575,878	1,115,092
2000	8,519,241	5,908,756	5,042,334	664,995	201,427	3,744,022	2,610,485	1,133,537
2001	8,799,998	6,150,475	5,274,183	672,049	204,243	3,811,494	2,649,523	1,161,971
2002	9,118,926	6,430,412	5,543,981	679,073	207,358	3,877,752	2,688,514	1,189,238
2003	9,510,138	6,769,336	5,873,673	686,304	209,359	3,953,248	2,740,802	1,212,446
2004	9,792,950	7,019,198	6,116,444	692,019	210,735	4,017,108	2,773,752	1,243,356
2005	10,094,657	7,298,737	6,385,405	700,331	213,001	4,082,870	2,795,920	1,286,950
2006	10,646,193	7,803,692	6,806,918	776,596	220,178	4,152,130	2,842,501	1,309,629
2007	11,000,748	8,118,382	7,098,723	794,677	224,982	4,221,920	2,882,366	1,339,554
2008	11,486,100	8,528,164	7,426,691	871,466	230,007	4,333,096	2,957,936	1,375,160
2009	11,997,296	8,945,376	7,788,013	920,883	236,480	4,451,288	3,051,920	1,399,368

SOURCES: Social Security Administration, Master Beneficiary Record and Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

- Includes persons receiving Old-Age, Survivors, and Disability Insurance (OASDI), SSI, or both.
- The number of OASDI disabled adult child beneficiaries aged 18–64 also receiving SSI was estimated on the basis of the number of such beneficiaries aged 18 or older for the same year and on the comparative size of the two groups at the end of 1988.
- December data for OASDI disabled beneficiaries also receiving SSI were not available. Instead, the average of the September 1989 and March 1990 numbers was used.

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

3.C Interprogram Data

Table 3.C7a—Number of persons aged 15 or older reporting only one race and having Social Security (OASDI) benefits or Supplemental Security Income (SSI) in March 2010, by sex, age, and race, and average annual benefit in 2009

Sex and age	All persons		White	Black or African American	American Indian, Alaska Native	Asian	Native Hawaiian and Other Pacific Islander	
	Total	Reporting only one race						
Social Security beneficiaries (thousands)								
Total	43,624	43,189	37,381	4,447	213	1,103	45	
Sex								
Male	19,076	18,879	16,501	1,810	91	455	22	
Female	24,548	24,310	20,880	2,637	122	648	23	
Age								
15–54	4,807	4,720	3,591	982	55	84	8	
55–64	5,767	5,694	4,723	800	30	136	6	
65–74	17,128	16,958	14,862	1,509	78	489	20	
75 or older	15,922	15,816	14,206	1,157	51	392	10	
Supplemental Security Income recipients (thousands)								
Total	5,460	5,337	3,557	1,445	91	233	11	
Sex								
Male	2,256	2,209	1,482	589	45	84	8	
Female	3,204	3,127	2,074	856	46	149	2	
Age								
15–54	3,084	2,992	1,992	889	59	44	8	
55–64	1,250	1,230	876	317	15	20	2	
65–74	652	643	411	146	11	75	1	
75 or older	474	471	277	93	6	95	a	
Average annual benefit in 2009 (dollars)								
Social Security	13,159	13,168	13,372	11,820	11,046	12,190	b	
Supplemental Security Income	7,173	7,173	7,311	6,934	6,744	6,628	b	

SOURCE: Census Bureau, Current Population Survey, public-use file of the March 2010 Income Supplement.

NOTES: Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see Census Bureau, *Current Population Reports*, Series P-60.

Totals do not necessarily equal the sum of rounded components.

OASDI = Old-Age, Survivors, and Disability Insurance.

a. Fewer than 500 recipients.

b. Average benefits are not shown for fewer than 75,000 weighted cases.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

Table 3.C7b—Number of persons aged 15 or older reporting one or more races and having Social Security (OASDI) benefits or Supplemental Security Income (SSI) in March 2010, by sex, age, and race, and average annual benefit in 2009

Sex and age	All persons			White alone or in combination	Black or African American alone or in combination	American Indian, Alaska Native alone or in combination	Asian alone or in combination	Native Hawaiian and Other Pacific Islander alone or in combination
	Total	Reporting only one race	Reporting two or more races					
Social Security beneficiaries (thousands)								
Total ^a	43,624	43,189	435	37,767	4,570	533	1,145	68
Sex								
Male	19,076	18,879	197	16,680	1,864	226	484	35
Female	24,548	24,310	238	21,087	2,706	307	661	33
Age								
15–54	4,807	4,720	87	3,666	1,009	108	99	10
55–64	5,767	5,694	73	4,786	817	85	145	11
65–74	17,128	16,958	170	15,014	1,554	210	502	28
75 or older	15,922	15,816	105	14,301	1,189	130	399	18
Supplemental Security Income recipients (thousands)								
Total ^a	5,460	5,337	124	3,667	1,497	154	252	19
Sex								
Male	2,256	2,209	47	1,527	601	72	95	11
Female	3,204	3,127	77	2,140	896	83	156	8
Age								
15–54	3,084	2,992	92	2,074	937	92	61	16
55–64	1,250	1,230	20	895	318	34	20	2
65–74	652	643	9	418	148	18	75	1
75 or older	474	471	3	281	93	9	95	^b
Average annual benefit in 2009 (dollars)								
Social Security	13,159	13,168	12,209	13,361	11,828	11,843	12,134	^c
Supplemental Security Income	7,173	7,173	7,184	7,309	6,963	6,931	6,528	^c

SOURCE: Census Bureau, Current Population Survey, public-use file of the March 2010 Income Supplement.

NOTES: Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see Census Bureau, *Current Population Reports*, Series P-60.

Totals do not necessarily equal the sum of rounded components.

"In combination" means in combination with one or more other races.

OASDI = Old-Age, Survivors, and Disability Insurance.

- a. The sum of the five race groups adds to more than the total because individuals may report more than one race.
- b. Fewer than 500 recipients.
- c. Average benefits are not shown for fewer than 75,000 weighted cases.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

3.C Interprogram Data

Table 3.C8—Number of persons aged 15 or older with Social Security (OASDI) benefits or Supplemental Security Income (SSI) and number and percentage of Hispanic origin in March 2010, by age and sex, and average annual benefit in 2009

Age	All beneficiaries (thousands)			Hispanic origin ^a (thousands)			Hispanic origin as a percentage of all beneficiaries ^a		
	Total	Men	Women	Total	Men	Women	Total	Men	Women
Social Security beneficiaries									
Total, all ages	43,624	19,076	24,548	3,106	1,411	1,695	7.1	7.4	6.9
15-34	1,547	724	823	181	83	98	11.7	11.4	11.9
35-44	1,126	446	681	131	54	77	11.6	12.1	11.4
45-54	2,133	1,013	1,120	235	119	116	11.0	11.8	10.4
55-64	5,767	2,623	3,144	452	216	236	7.8	8.2	7.5
65-74	17,128	7,915	9,213	1,200	528	672	7.0	6.7	7.3
75 or older	15,922	6,355	9,566	907	411	496	5.7	6.5	5.2
Supplemental Security Income recipients									
Total, all ages	5,460	2,256	3,204	819	320	499	15.0	14.2	15.6
15-34	1,185	553	631	188	86	103	15.9	15.5	16.2
35-44	764	316	448	115	40	75	15.1	12.8	16.7
45-54	1,135	460	676	138	60	79	12.2	13.0	11.6
55-64	1,250	553	697	155	65	91	12.4	11.7	13.0
65-74	652	215	437	126	37	89	19.3	17.0	20.4
75 or older	474	159	316	96	33	64	20.3	20.6	20.2
Average annual benefit in 2009 (dollars)									
Social Security	13,159	14,932	11,780	11,024	12,435	9,850	...	...	...
Supplemental Security Income	7,173	7,816	6,721	6,714	6,945	6,567	...	...	...

SOURCE: Census Bureau, Current Population Survey, public-use file of the March 2010 Income Supplement.

NOTES: Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see Census Bureau, *Current Population Reports*, Series P-60.

Totals do not necessarily equal the sum of rounded components.

OASDI = Old-Age, Survivors, and Disability Insurance; ... = not applicable.

a. Persons of Hispanic origin may be of any race.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

Table 3.E1—Weighted average poverty thresholds for nonfarm families, by size, 1959–2009 (in dollars)

Year	Unrelated individuals			Families								Annual average CPI ^a
				2 persons			3 persons	4 persons	5 persons	6 persons	7 persons or more	
	All ages	Under age 65	Aged 65 or older	All ages	Householder under age 65	Householder aged 65 or older						
1959	1,467	1,503	1,397	1,894	1,952	1,761	2,324	2,973	3,506	3,944	4,849	29.2
1960	1,490	1,526	1,418	1,924	1,982	1,788	2,359	3,022	3,560	4,002	4,921	29.6
1961	1,506	1,545	1,433	1,942	2,005	1,808	2,383	3,054	3,597	4,041	4,967	29.9
1962	1,519	1,562	1,451	1,962	2,027	1,828	2,412	3,089	3,639	4,088	5,032	30.3
1963	1,539	1,581	1,470	1,988	2,052	1,850	2,442	3,128	3,685	4,135	5,092	30.6
1964	1,558	1,601	1,488	2,015	2,079	1,875	2,473	3,169	3,732	4,193	5,156	31.0
1965	1,582	1,626	1,512	2,048	2,114	1,906	2,514	3,223	3,797	4,264	5,248	31.5
1966	1,628	1,674	1,556	2,107	2,175	1,961	2,588	3,317	3,908	4,388	5,395	32.5
1967	1,675	1,722	1,600	2,168	2,238	2,017	2,661	3,410	4,019	4,516	5,550	33.4
1968	1,748	1,797	1,667	2,262	2,333	2,102	2,774	3,553	4,188	4,706	5,789	34.8
1969	1,840	1,893	1,757	2,383	2,458	2,215	2,924	3,743	4,415	4,958	6,101	36.7
1970	1,954	2,010	1,861	2,525	2,604	2,348	3,099	3,968	4,680	5,260	6,468	38.8
1971	2,040	2,098	1,940	2,633	2,716	2,448	3,229	4,137	4,880	5,489	6,751	40.5
1972	2,109	2,168	2,005	2,724	2,808	2,530	3,339	4,275	5,044	5,673	6,983	41.8
1973	2,247	2,307	2,130	2,895	2,984	2,688	3,548	4,540	5,358	6,028	7,435	44.4
1974	2,495	2,562	2,364	3,211	3,312	2,982	3,936	5,038	5,950	6,699	8,253	49.3
1975	2,724	2,797	2,581	3,506	3,617	3,257	4,293	5,500	6,499	7,316	9,022	53.8
1976	2,884	2,959	2,730	3,711	3,826	3,445	4,540	5,815	6,876	7,760	9,588	56.9
1977	3,075	3,152	2,906	3,951	4,072	3,666	4,833	6,191	7,320	8,261	10,216	60.6
1978	3,311	3,392	3,127	4,249	4,383	3,944	5,201	6,662	7,880	8,891	11,002	65.2
1979	3,689	3,778	3,479	4,725	4,878	4,390	5,784	7,412	8,775	9,914	12,280	72.6
1980	4,190	4,290	3,949	5,363	5,537	4,983	6,565	8,414	9,966	11,269	13,955	82.4
1981	4,620	4,729	4,359	5,917	6,111	5,498	7,250	9,287	11,007	12,449	...	90.9
1982	4,901	5,019	4,626	6,281	6,487	5,836	7,693	9,862	11,684	13,207	...	96.5
1983	5,061	5,180	4,775	6,483	6,697	6,023	7,938	10,178	12,049	13,630	...	99.6
1984	5,278	5,400	4,979	6,762	6,983	6,282	8,277	10,609	12,566	14,207	...	103.9
1985	5,469	5,593	5,156	6,998	7,231	6,503	8,573	10,989	13,007	14,696	...	107.6
1986	5,572	5,701	5,255	7,138	7,372	6,630	8,737	11,203	13,259	14,986	...	109.6
1987	5,778	5,909	5,447	7,397	7,641	6,872	9,056	11,611	13,737	15,509	...	113.6
1988	6,022	6,155	5,674	7,704	7,958	7,157	9,435	12,092	14,304	16,146	...	118.3
1989	6,310	6,451	5,947	8,076	8,343	7,501	9,885	12,674	14,990	16,921	...	124.0
1990	6,652	6,800	6,268	8,509	8,794	7,905	10,419	13,359	15,792	17,839	...	130.7
1991	6,932	7,086	6,532	8,865	9,165	8,241	10,860	13,924	16,456	18,587	...	136.2
1992	7,143	7,299	6,729	9,137	9,443	8,487	11,186	14,335	16,952	19,137	...	140.3
1993	7,363	7,518	6,930	9,414	9,728	8,740	11,522	14,763	17,449	19,718	...	144.5
1994	7,547	7,710	7,108	9,661	9,976	8,967	11,821	15,141	17,900	20,235	...	148.2
1995	7,763	7,929	7,309	9,933	10,259	9,219	12,158	15,569	18,408	20,804	...	152.4
1996	7,995	8,163	7,525	10,233	10,564	9,491	12,516	16,036	18,952	21,389	...	156.9
1997	8,183	8,350	7,698	10,473	10,805	9,712	12,802	16,400	19,380	21,886	...	160.5
1998	8,316	8,480	7,818	10,634	10,972	9,862	13,003	16,660	19,680	22,228	...	163.0
1999	8,501	8,667	7,990	10,869	11,214	10,075	13,290	17,029	20,127	22,727	...	166.6

(Continued)

3.E Poverty

Table 3.E1—Weighted average poverty thresholds for nonfarm families, by size, 1959–2009 (in dollars)—Continued

Year	Unrelated individuals			Families								Annual average CPI ^a
				2 persons			3 persons	4 persons	5 persons	6 persons	7 persons or more	
	All ages	Under age 65	Aged 65 or older	All ages	Householder under age 65	Householder aged 65 or older						
2000	8,794	8,959	8,259	11,239	11,590	10,419	13,738	17,603	20,819	23,528	...	172.2
2001	9,039	9,214	8,494	11,569	11,920	10,715	14,128	18,104	21,405	24,195	...	177.1
2002	9,183	9,359	8,628	11,756	12,110	10,885	14,348	18,392	21,744	24,576	...	179.9
2003	9,393	9,573	8,825	12,015	12,384	11,133	14,680	18,810	22,245	25,122	...	184.0
2004	9,645	9,827	9,060	12,334	12,714	11,430	15,067	19,307	22,831	25,788	...	188.9
2005	9,973	10,160	9,367	12,755	13,145	11,815	15,577	19,971	23,613	26,683	...	195.3
2006	10,294	10,488	9,669	13,167	13,569	12,201	16,079	20,614	24,382	27,560	...	201.6
2007	10,590	10,787	9,944	13,540	13,954	12,550	16,530	21,203	25,080	28,323	...	207.3
2008	10,991	11,201	10,326	14,051	14,489	13,030	17,163	22,025	26,049	29,456	...	215.3
2009 ^b	10,952	11,161	10,289	14,001	14,437	12,984	17,102	21,947	25,956	29,351	...	214.5

SOURCE: Census Bureau, Current Population Survey.

NOTES: CPI = Consumer Price Index; ... = not applicable.

Three technical changes in the definition of poverty are described in "Characteristics of the Population Below the Poverty Level, 1980," Census Bureau, *Current Population Reports*, Series P-60, No. 133: (1) Distinctions based on the sex of the family householder will no longer be made; (2) income thresholds for farm families will be the same as for nonfarm families of the same size and composition, and (3) the increased sample size will now permit separate poverty income criteria for families of 7, 8, and 9 or more persons. Separate criteria for these family sizes by number of children have been developed by the Social Security Administration for the base year 1978 on the same basis as the original poverty matrix for smaller family sizes, and then updated by means of the all-items CPI. The dollar thresholds for larger families beginning in 1980 are:

Year	9 persons		
	7 persons	8 persons	or more
1980	12,761	14,199	16,896
1981	14,110	15,655	18,572
1982	15,036	16,719	19,698
1983	15,500	17,170	20,310
1984	16,096	17,961	21,247
1985	16,656	18,512	22,083
1986	17,049	18,791	22,497
1987	17,649	19,515	23,105
1988	18,232	20,253	24,129
1989	19,162	21,328	25,480
1990	20,241	22,582	26,848
1991	21,058	23,605	27,942
1992	21,594	24,053	28,745
1993	22,383	24,838	29,529
1994	22,923	25,427	30,300
1995	23,552	26,237	31,280
1996	24,268	27,091	31,971
1997	24,802	27,593	32,566
1998	25,257	28,166	33,339
1999	25,912	28,967	34,417
2000	26,754	29,701	35,060
2001	27,517	30,627	36,286
2002	28,001	30,907	37,062
2003	28,544	31,589	37,656
2004	29,236	32,641	39,048
2005	30,249	33,610	40,288
2006	31,205	34,774	41,499
2007	32,233	35,816	42,739
2008	33,529	37,220	44,346
2009 ^b	33,410	37,088	44,188

a. Beginning in January 1978, the Bureau of Labor Statistics introduced a new price index for all urban consumers (CPI-U) for all items (1982–1984 = 100) that forms a continuous series with the earlier index for urban wage earners and for clerical workers as of December 1977.

b. Preliminary estimates.

CONTACT: Bernadette D. Proctor (301) 763-3213 or supplement@ssa.gov.

Table 3.E2—Number and percentage of poor persons, by age, at end of selected years 1959–2008

Age and family status ^a	1959	1970	1980	1985	1990 ^b	1995	2000	2005	2008
Total population^c (millions)									
All ages	176.5	202.5	225.0	236.6	248.6	263.7	275.9	293.1	301.1
Children under 18 in families—	64.0	69.9	62.2	62.0	64.9	70.3	70.6	72.0	72.8
With male householder ^d	58.3	60.8	50.6	49.5	49.5	52.1	54.5	54.4	54.2
With female householder	5.7	9.0	11.5	12.5	15.4	18.2	16.1	17.6	18.5
18–54 ^e	81.0	94.9	116.3	125.2	132.3	140.7	147.4	153.6	155.0
55–64	15.5	18.4	21.7	22.1	21.3	21.1	23.8	31.0	34.3
65 or older	15.6	19.3	24.7	27.3	30.1	31.7	33.0	35.5	37.8
In families	11.9	13.4	16.7	18.4	20.1	21.1	22.3	23.8	25.4
Unrelated individuals	3.7	5.8	8.0	8.9	10.0	10.6	10.7	11.7	12.4
Men	1.2	1.4	1.7	2.0	2.3	2.7	2.9	3.4	3.6
Women	2.5	4.4	6.3	7.0	7.7	7.9	7.8	8.3	8.8
Number poor^c (millions)									
All ages	39.5	25.3	29.3	33.1	33.6	36.4	31.1	36.9	39.9
Children under 18 in families—	17.2	10.5	11.1	12.5	13.3	14.4	11.1	12.3	13.4
With male householder ^d	13.1	5.7	5.2	5.8	5.3	5.6	4.9	5.0	5.7
With female householder	4.1	4.8	5.9	6.7	8.0	8.9	6.2	7.3	7.7
18–54 ^e	13.4	8.2	12.2	14.8	14.6	16.5	14.1	18.0	19.1
55–64	3.3	2.1	2.1	2.3	2.1	2.2	2.2	2.7	3.1
65 or older	5.5	4.7	3.9	3.5	3.7	3.3	3.4	3.6	3.7
In families	3.2	2.0	1.4	1.2	1.2	1.1	1.1	1.3	1.5
Unrelated individuals	2.3	2.7	2.4	2.3	2.5	2.3	2.2	2.3	2.1
Men	0.7	0.5	0.4	0.4	0.4	0.4	0.5	0.5	0.4
Women	1.6	2.2	2.0	1.9	2.1	1.9	1.7	1.7	1.7
Percentage poor^c									
All ages	22.4	12.6	13.0	14.0	13.5	13.8	11.3	12.6	13.3
Children under 18 in families—	26.9	15.0	17.9	20.1	20.5	20.5	15.7	17.1	18.4
With male householder ^d	22.4	9.3	10.4	11.7	10.7	10.7	8.9	9.2	10.5
With female householder	72.2	53.4	50.8	53.6	52.1	48.6	38.4	41.6	41.6
18–54 ^e	16.5	8.7	10.5	11.8	11.0	11.7	9.6	11.7	12.3
55–64	21.5	11.4	9.5	10.5	9.7	10.2	9.4	8.7	9.0
65 or older	35.2	24.6	15.7	12.6	12.2	10.5	10.2	10.1	9.8
In families	26.9	14.7	8.5	6.4	5.9	5.0	5.1	5.6	5.9
Unrelated individuals	61.9	47.1	30.6	25.6	24.8	21.4	20.8	19.5	16.9
Men	59.0	38.9	24.4	20.5	17.3	14.3	18.3	15.6	11.1
Women	63.3	49.7	32.3	27.0	26.9	23.8	21.8	21.1	19.3

SOURCES: Census Bureau, Current Population Survey, public-use file of the March 2009 Income Supplement. Data for 1970 are based on the 1970 Census of Population controls.

NOTES: Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see Census Bureau, *Current Population Reports*, Series P-60.

- a. Income and poverty status refer to the calendar year shown; family status is as of March of the succeeding year.
- b. Based on revised methodology.
- c. Includes armed forces in the United States living off post or with families on post. Excludes unrelated individuals under age 16.
- d. Includes children in families with both spouses present and in families with male householder with no spouse present.
- e. Includes persons under age 18 listed as unrelated individual, family householder, spouse of householder, or other family member.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

3.E Poverty

Table 3.E3—Shares of money income from earnings and other sources for aged and nonaged families, 2008

Type of money income received during year	Aged family units						Nonaged family units					
	Individuals aged 65 or older living alone or with nonrelatives only			Multiperson families with householder aged 65 or older			Individuals under age 65 living alone or with nonrelatives only			Multiperson families with householder under age 65		
	Total	Nonpoor	Poor ^a	Total	Nonpoor	Poor ^a	Total	Nonpoor	Poor ^a	Total	Nonpoor	Poor ^a
Number of families and unrelated individuals (millions)	12.4	10.2	2.1	13.0	12.2	0.8	39.0	30.3	8.7	65.9	58.6	7.3
Percentage receiving income of specified type^b												
Earnings	17	20	3	47	49	19	81	92	40	93	97	65
Public program payments												
Social Security ^c	89	91	79	89	91	64	7	6	10	11	11	12
Supplemental Security Income	4	2	15	4	4	12	4	1	12	4	3	10
Other public assistance	2	2	2	3	3	3	8	7	12	11	10	20
Other programs ^d	4	4	1	9	9	3	6	7	4	11	11	7
Other sources												
Dividends, interest, rent	52	58	22	62	65	25	38	45	13	53	58	14
Employment-related pensions, alimony, annuities	39	46	8	49	52	10	6	7	3	15	15	14
Percentage distribution of income, by type												
Total percent	100	100	100	100	100	100	100	100	100	100	100	100
Earnings	19	20	1	38	38	15	89	90	50	90	90	67
Public program payments												
Social Security ^c	44	42	83	31	31	67	2	2	17	2	2	10
Supplemental Security Income	1	^e	8	1	^e	8	1	^e	17	^e	^e	7
Other public assistance	^e	^e	^e	^e	^e	2	2	2	8	1	1	7
Other programs ^d	1	1	1	1	1	1	1	1	3	1	1	3
Other sources												
Dividends, interest, rent	14	14	2	11	12	2	3	3	2	3	3	1
Employment-related pensions, alimony, annuities	21	22	4	17	17	5	3	3	2	3	3	5
Median income (dollars)	18,157	20,862	8,357	44,510	47,114	10,740	30,000	35,000	7,200	66,000	72,923	11,529

SOURCE: Census Bureau, Current Population Survey, public-use file of the March 2009 Income Supplement.

NOTES: Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see Census Bureau, *Current Population Reports*, Series P-60.

- a. Poverty status based on money income of all family members after receipt of Social Security and any other cash transfer payments.
- b. Received by individuals or any family member at any time during 2008. Most individuals or families received more than one type of income during the year.
- c. Social Security may include more than one type of income during the year.
- d. Unemployment insurance, workers' compensation, or veterans' payments.
- e. Less than 0.5 percent.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

Table 3.E4—Current living arrangements of persons aged 65 or older, by sex and poverty status, March 2009

Living arrangement	Population (thousands)			Percentage distribution			Percentage officially poor
	Total	Poor	Nonpoor	Total	Poor	Nonpoor	
All persons aged 65 or older							
Total	37,788	3,656	34,132	100.0	100.0	100.0	9.7
Unrelated individuals	12,382	2,127	10,255	32.8	58.2	30.0	17.2
Family members	25,405	1,529	23,877	67.2	41.8	70.0	6.0
Householder or spouse	23,111	1,337	21,774	61.2	36.6	63.8	5.8
Other relative ^a	2,295	192	2,103	6.1	5.3	6.2	8.4
Poor by own income	972	152	820	2.6	4.2	2.4	15.6
Not poor by own income	1,323	40	1,283	3.5	1.1	3.8	3.0
Men							
Subtotal	16,308	1,092	15,216	43.2	29.9	44.6	6.7
Unrelated individuals	3,565	443	3,122	9.4	12.1	9.1	12.4
Family members	12,743	649	12,094	33.7	17.8	35.4	5.1
Householder	7,941	381	7,559	21.0	10.4	22.1	4.8
Spouse of householder	4,253	217	4,037	11.3	5.9	11.8	5.1
Other relative ^a	549	51	498	1.5	1.4	1.5	9.3
Poor by own income	205	40	164	0.5	1.1	0.5	19.5
Not poor by own income	345	11	334	0.9	0.3	1.0	3.2
Women							
Subtotal	21,480	2,564	18,916	56.8	70.1	55.4	11.9
Unrelated individuals	8,817	1,684	7,133	23.3	46.1	20.9	19.1
Family members	12,662	880	11,782	33.5	24.1	34.5	6.9
Householder, no husband present	1,948	293	1,654	5.2	8.0	4.8	15.0
Householder with husband present	3,302	154	3,148	8.7	4.2	9.2	4.7
Wife of householder	5,667	291	5,375	15.0	8.0	15.7	5.1
Other relative ^a	1,746	141	1,605	4.6	3.9	4.7	8.1
Poor by own income	767	112	656	2.0	3.1	1.9	14.6
Not poor by own income	978	29	949	2.6	0.8	2.8	3.0

SOURCE: Census Bureau, Current Population Survey, public-use file of the March 2009 Income Supplement.

NOTES: Living arrangements as of March 2009.

Poverty status in 2008 as reflected by income of unrelated individual or family money income for year compared with official poverty income criterion for families of appropriate size and composition.

Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

Totals do not necessarily equal the sum of rounded components.

For a discussion of standard errors of estimated numbers and percentages, see Census Bureau, *Current Population Reports*, Series P-60.

- a. Aged family members who are neither the family householder nor the spouse of the householder. Official poverty classification is based on combined income of all related persons living together. Persons in this group are classified here on the basis of official poverty criteria for family income and on a comparison of their own income with official poverty criteria for elderly persons maintaining their own households. The hidden poor are other relatives in nonpoor households whose own income is below the official poverty line for unrelated individuals or married couples.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

3.E Poverty

Table 3.E6—Percentage distribution of aged families receiving Social Security benefits, by share of income from benefits and race, 2008

Social Security share of money income for year ^a	Individuals aged 65 or older living alone or with nonrelatives only				Multiperson families with householder aged 65 or older			
	Total	Nonpoor	Poor	Percent poor	Total	Nonpoor	Poor	Percent poor
All races ^b								
Number (thousands)	12,367	10,247	2,119	...	12,980	12,164	816	...
Percent	100	100	100	17	100	100	100	6
No Social Security benefits	11	9	21	33	11	9	36	21
Some Social Security benefits	89	91	79	15	89	91	64	4
Less than one-fourth of income	9	11	1	2	21	23	2	0
One-fourth to one-half of income	17	20	3	3	25	27	3	1
One-half to three-fourths of income	17	19	6	6	18	19	8	3
Three-fourths or more of income	46	42	69	26	25	23	51	13
White only								
Number (thousands)	10,701	9,061	1,640	...	11,322	10,749	572	...
Percent	100	100	100	15	100	100	100	5
No Social Security benefits	8	21	10	33	10	8	35	18
Some Social Security benefits	84	85	80	28	90	92	65	4
Less than one-fourth of income	9	11	1	2	21	22	1	0
One-fourth to one-half of income	18	20	3	3	26	27	3	0
One-half to three-fourths of income	17	19	6	6	18	19	7	2
Three-fourths or more of income	46	42	69	23	25	23	54	11
Black only								
Number (thousands)	1,296	917	379	...	1,068	890	178	...
Percent	100	100	100	29	100	100	100	17
No Social Security benefits	16	15	20	36	16	13	32	33
Some Social Security benefits	84	85	80	28	84	87	68	13
Less than one-fourth of income	7	9	0	0	19	22	3	3
One-fourth to one-half of income	13	18	3	7	25	29	4	3
One-half to three-fourths of income	14	18	4	9	14	14	12	14
Three-fourths or more of income	50	40	73	43	26	21	49	31

SOURCE: Census Bureau, Current Population Survey, public-use file of the March 2009 Income Supplement.

NOTES: Civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

Totals do not necessarily equal the sum of rounded components.

For a discussion of standard errors of estimated numbers and percentages, see Census Bureau, *Current Population Reports*, Series P-60.

... = not applicable.

a. Payments under Social Security program any time in 2008 to any family member as reported in the March 2009 Current Population Survey.

b. Includes other races.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

Table 3.E8—Poverty guidelines for families of specified size, 1965–2010 (in dollars)

Date of issuance ^a	1 person	2 persons	3 persons	4 persons	5 persons	6 persons	7 persons	8 persons	Increment ^b
December 1965	1,540	1,990	2,440	3,130	3,685	4,135	4,635	5,135	500
August 1967	1,600	2,000	2,500	3,200	3,800	4,200	4,700	5,300	500
September 1968	1,600	2,100	2,600	3,300	3,900	4,400	4,900	5,400	500
September 1969	1,800	2,400	3,000	3,600	4,200	4,800	5,400	6,000	600
December 1970	1,900	2,500	3,100	3,800	4,400	5,000	5,600	6,200	600
November 1971	2,000	2,600	3,300	4,000	4,700	5,300	5,900	6,500	600
October 1972	2,100	2,725	3,450	4,200	4,925	5,550	6,200	6,850	650
March 1973	2,200	2,900	3,600	4,300	5,000	5,700	6,400	7,100	700
May 1974	2,330	3,070	3,810	4,550	5,290	6,030	6,770	7,510	740
March 1975	2,590	3,410	4,230	5,050	5,870	6,690	7,510	8,330	820
April 1976	2,800	3,700	4,600	5,500	6,400	7,300	8,200	9,100	900
April 1977	2,970	3,930	4,890	5,850	6,810	7,770	8,730	9,690	960
April 1978	3,140	4,160	5,180	6,200	7,220	8,240	9,260	10,280	1,020
May 1979	3,400	4,500	5,600	6,700	7,800	8,900	10,000	11,100	1,100
April 1980	3,790	5,010	6,230	7,450	8,670	9,890	11,110	12,330	1,220
March 1981	4,310	5,690	7,070	8,450	9,830	11,210	12,590	13,970	1,380
April 1982	4,680	6,220	7,760	9,300	10,840	12,380	13,920	15,460	1,540
February 1983	4,860	6,540	8,220	9,900	11,580	13,260	14,940	16,620	1,680
February 1984	4,980	6,720	8,460	10,200	11,940	13,680	15,420	17,160	1,740
March 1985	5,250	7,050	8,850	10,650	12,450	14,250	16,050	17,850	1,800
February 1986	5,360	7,240	9,120	11,000	12,880	14,760	16,640	18,520	1,880
February 1987	5,500	7,400	9,300	11,200	13,100	15,000	16,900	18,800	1,900
February 1988	5,770	7,730	9,690	11,650	13,610	15,570	17,530	19,490	1,960
February 1989	5,980	8,020	10,060	12,100	14,140	16,180	18,220	20,260	2,040
February 1990	6,280	8,420	10,560	12,700	14,840	16,980	18,120	21,260	2,140
February 1991	6,620	8,880	11,140	13,400	15,660	17,920	20,180	22,440	2,260
February 1992	6,810	9,190	11,570	13,950	16,330	18,710	21,090	23,470	2,380
February 1993	6,970	9,430	11,890	14,350	16,810	19,270	21,730	24,190	2,460
February 1994	7,360	9,840	12,320	14,800	17,280	19,760	22,240	24,720	2,480
February 1995	7,470	10,030	12,590	15,150	17,710	20,270	22,830	25,390	2,560
March 1996	7,740	10,360	12,980	15,600	18,220	20,840	23,460	26,080	2,620
March 1997	7,890	10,610	13,330	16,050	18,770	21,490	24,210	26,960	2,720
February 1998	8,050	10,850	13,650	16,450	19,250	22,050	24,850	27,650	2,800
March 1999	8,240	11,060	13,880	16,700	19,520	22,340	25,160	27,980	2,820
February 2000	8,350	11,250	14,150	17,050	19,950	22,850	25,750	28,650	2,900
February 2001	8,590	11,610	14,630	17,650	20,670	23,690	26,710	29,730	3,020
February 2002	8,860	11,940	15,020	18,100	21,180	24,260	27,340	30,420	3,080
February 2003	8,980	12,120	15,260	18,400	21,540	24,680	27,820	30,960	3,140
February 2004	9,310	12,490	15,670	18,850	22,030	25,210	28,390	31,570	3,180

(Continued)

3.E Poverty

Table 3.E8—Poverty guidelines for families of specified size, 1965–2010 (in dollars)—Continued

Date of issuance ^a	1 person	2 persons	3 persons	4 persons	5 persons	6 persons	7 persons	8 persons	Increment ^b
February 2005	9,570	12,830	16,090	19,350	22,610	25,870	29,130	32,390	3,260
January 2006	9,800	13,200	16,600	20,000	23,400	26,800	30,200	33,600	3,400
January 2007	10,210	13,690	17,170	20,650	24,130	27,610	31,090	34,570	3,480
January 2008	10,400	14,000	17,600	21,200	24,800	28,400	32,000	35,600	3,600
January 2009	10,830	14,570	18,310	22,050	25,790	29,530	33,270	37,010	3,740
January 2010	10,830	14,570	18,310	22,050	25,790	29,530	33,270	37,010	3,740

SOURCES: Department of Health and Human Services, *Federal Register*, vol. 75, no. 14 (January 22, 2010), pp. 3734–3735; earlier *Federal Register* notices (1968–2008); and Israel Putnam, "Poverty Thresholds: Their History and Future Development" [November 1970], p. 281 in Mollie Orshansky [editor], *Documentation of Background Information and Rationale for Current Poverty Matrix* (Technical Paper I of *The Measure of Poverty*), Washington, D.C., U.S. Department of Health, Education, and Welfare, 1977.

NOTES: Except for Alaska and Hawaii. Guidelines for Alaska and Hawaii since 1980 are:

Year	Alaska		Hawaii	
	1 person	Increment	1 person	Increment
1980	4,760	1,520	4,370	1,400
1981	5,410	1,720	4,980	1,580
1982	5,870	1,920	5,390	1,770
1983	6,080	2,100	5,600	1,930
1984	6,240	2,170	5,730	2,000
1985	6,560	2,250	6,040	2,070
1986	6,700	2,350	6,170	2,160
1987	6,860	2,380	6,310	2,190
1988	7,210	2,450	6,650	2,250
1989	7,480	2,550	6,870	2,350
1990	7,840	2,680	7,230	2,460
1991	8,290	2,820	7,610	2,600
1992	8,500	2,980	7,830	2,740
1993	8,700	3,080	8,040	2,820
1994	9,200	3,100	8,470	2,850
1995	9,340	3,200	8,610	2,940
1996	9,660	3,280	8,910	3,010
1997	9,870	3,400	9,070	3,130
1998	10,070	3,500	9,260	3,220
1999	10,320	3,520	9,490	3,240
2000	10,430	3,630	9,590	3,340
2001	10,730	3,780	9,890	3,470
2002	11,080	3,850	10,200	3,540
2003	11,210	3,930	10,330	3,610
2004	11,630	3,980	10,700	3,660
2005	11,950	4,080	11,010	3,750
2006	12,250	4,250	11,270	3,910
2007	12,770	4,350	11,750	4,000
2008	13,000	4,500	11,960	4,140
2009	13,530	4,680	12,460	4,300
2010	13,530	4,680	12,460	4,300

Separate figures for Alaska and Hawaii reflect Office of Economic Opportunity administrative practice beginning in the 1966–1970 period. The Census Bureau, producer of the primary version of the poverty measure (the poverty thresholds), does not produce separate figures for Alaska and Hawaii.

Before 1983, the guidelines shown are for nonfarm families only.

- a. The guidelines are effective from the date of issuance (unless otherwise specified by a particular program using them).
- b. Add this amount for each additional family member. Before 1973, increments between some of the smaller family sizes differed from the increment shown in the table. Beginning in 1973, the increment has been the same for all family sizes in each year's set of guidelines.

CONTACT: Gordon Fisher (202) 690-7507 or supplement@ssa.gov.



Old-Age, Survivors, and Disability Insurance

Trust Funds	4.1
Covered Workers	4.12
Insured Workers	4.38

Table 4.A1—Old-Age and Survivors Insurance, selected years 1937–2009 (in millions of dollars)

Year	Receipts					Expenditures				Assets	
	Total	Net contributions ^a	Income from taxation of benefits	Net interest ^b	Payments from the general fund of the Treasury ^c	Total	Benefit payments ^d	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of year
1937	767	765	...	2	...	1	1	...	...	766	766
1938	375	360	...	15	...	10	10	...	...	366	1,132
1939	607	580	...	27	...	14	14	...	...	592	1,724
1940	368	325	...	43	...	62	35	26	...	306	2,031
1945	1,420	1,285	...	134	...	304	274	30	...	1,116	7,121
1950	2,928	2,667	...	257	4	1,022	961	61	...	1,905	13,721
1955	6,167	5,713	...	454	...	5,079	4,968	119	-7	1,087	21,663
1960	11,382	10,866	...	516	...	11,198	10,677	203	318	184	20,324
1965	16,610	16,017	...	593	...	17,501	16,737	328	436	-890	18,235
1966	21,302	20,580	...	644	78	18,967	18,267	256	444	2,335	20,570
1967	24,034	23,138	...	818	78	20,382	19,468	406	508	3,652	24,222
1968	25,040	23,719	...	939	382	23,557	22,643	476	438	1,483	25,704
1969	29,554	27,947	...	1,165	442	25,176	24,210	474	491	4,378	30,082
1970	32,220	30,256	...	1,515	449	29,848	28,798	471	579	2,371	32,454
1971	35,877	33,723	...	1,667	488	34,542	33,414	514	613	1,335	33,789
1972	40,050	37,781	...	1,794	475	38,522	37,124	674	724	1,528	35,318
1973	48,344	45,975	...	1,928	442	47,175	45,745	647	783	1,169	36,487
1974	54,688	52,081	...	2,159	447	53,397	51,623	865	909	1,291	37,777
1975	59,605	56,816	...	2,364	425	60,395	58,517	896	982	-790	36,987
1976	66,276	63,362	...	2,301	614	67,876	65,705	959	1,212	-1,600	35,388
1977	72,412	69,572	...	2,227	613	75,309	73,121	981	1,208	-2,897	32,491
1978	78,094	75,471	...	2,008	615	83,064	80,361	1,115	1,589	-4,971	27,520
1979	90,274	87,919	...	1,797	557	93,133	90,573	1,113	1,448	-2,860	24,660
1980	105,841	103,456	...	1,845	540	107,678	105,083	1,154	1,442	-1,837	22,823
1981	125,361	122,627	...	2,060	675	126,695	123,803	1,307	1,585	-1,334	21,490
1982	125,198	123,673	...	845	680	142,119	138,806	1,519	1,793	^e 598	22,088
1983	150,584	138,337	...	6,706	5,541	152,999	149,221	1,528	2,251	-2,416	19,672
1984	169,328	164,122	2,835	2,266	105	161,883	157,841	1,638	2,404	7,445	27,117
1985	184,239	176,958	3,208	1,871	2,203	171,150	167,248	1,592	2,310	^e 8,725	35,842
1986	197,393	190,741	3,424	3,069	160	181,000	176,813	1,601	2,585	^e 3,239	39,081
1987	210,736	202,735	3,257	4,690	55	187,668	183,587	1,524	2,557	23,068	62,149
1988	240,770	229,775	3,384	7,568	43	200,020	195,454	1,776	2,790	40,750	102,899
1989	264,653	250,195	2,439	11,985	34	212,489	207,971	1,673	2,845	52,164	155,063
1990	286,653	267,530	4,848	16,363	-2,089	227,519	222,987	1,563	2,969	59,134	214,197
1991	299,286	272,574	5,864	20,829	19	245,634	240,467	1,792	3,375	53,652	267,849
1992	311,162	280,992	5,852	24,303	14	259,861	254,883	1,830	3,148	51,301	319,150
1993	323,277	290,905	5,335	27,027	10	273,104	267,755	1,996	3,353	50,173	369,322
1994	328,271	293,323	4,995	29,946	7	284,133	279,068	1,645	3,420	44,138	413,460

(Continued)

4.A OASDI: Trust Funds

Table 4.A1—Old-Age and Survivors Insurance, selected years 1937–2009 (in millions of dollars)—Continued

Year	Receipts					Expenditures				Assets	
	Total	Net contributions ^a	Income from taxation of benefits	Net interest ^b	Payments from the general fund of the Treasury ^c	Total	Benefit payments ^d	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of year
1995	342,801	304,620	5,490	32,820	-129	297,760	291,630	2,077	4,052	45,041	458,502
1996	363,741	321,557	6,471	35,706	7	308,217	302,861	1,802	3,554	55,524	514,026
1997	397,169	349,946	7,426	39,795	2	322,073	316,257	2,128	3,688	75,096	589,121
1998	424,848	371,207	9,149	44,491	1	332,324	326,762	1,899	3,662	92,524	681,645
1999	457,040	396,352	10,899	49,788	f	339,874	334,383	1,809	3,681	117,167	798,812
2000	490,513	421,391	11,594	57,529	...	358,339	352,652	2,149	3,538	132,174	930,986
2001	518,100	441,460	11,903	64,737	...	377,546	372,312	1,961	3,273	140,554	1,071,540
2002	539,706	455,199	12,909	71,184	414	393,749	388,119	2,137	3,493	145,957	1,217,497
2003	543,811	456,077	12,497	75,237	...	405,978	399,845	2,553	3,580	137,833	1,355,330
2004	566,338	472,758	14,593	78,986	1	421,047	415,034	2,384	3,628	145,292	1,500,622
2005	604,335	506,863	13,843	83,979	-350	441,920	435,383	2,957	3,579	162,415	1,663,037
2006	642,231	534,787	15,628	91,817	f	460,965	454,496	3,010	3,458	181,266	1,844,304
2007	675,035	560,877	17,192	96,966	f	495,723	489,074	3,075	3,575	179,312	2,023,616
2008	695,462	574,555	15,566	105,340	f	516,192	509,337	3,223	3,632	179,270	2,202,886
2009	698,208	570,392	19,930	107,886	f	564,295	557,166	3,439	3,690	133,912	2,336,798

SOURCE: Department of the Treasury.

NOTES: Data for all years can be found at <http://www.socialsecurity.gov/OACT/STATS/table4a1.html>.

Totals do not necessarily equal the sum of rounded components.

... = not applicable.

- Beginning in 1983, includes transfers from the general fund of the Treasury representing contributions that would have been paid on deemed wage credits for military service in 1957–2001, if such credits were considered to be covered wages.
- Net interest includes net profits or losses on marketable securities, and includes interest adjustments on amounts reimbursed from, or paid to, other trust funds or the general fund of the Treasury.
- Includes payments (1) in 1947–1951 and in 1966 and later, for costs of noncontributory wage credits for military service performed before 1957; (2) in 1971–1982, for costs of deemed wage credits for military service performed after 1956; and (3) in 1968 and later, for costs of benefits to certain uninsured persons who attained age 72 before 1968.
- Beginning in 1966, includes payments for vocational rehabilitation services furnished to disabled persons receiving benefits because of their disabilities. Beginning in 1983, amounts are reduced by amount of reimbursement for unnegotiated benefit checks.
- Amount equals total receipts less total expenditures, plus amounts borrowed or less amounts repaid under interfund borrowing provisions.
- Between -\$500,000 and \$500,000.

CONTACT: Michael Stephens (410) 965-3028 or supplement@ssa.gov.

Table 4.A2—Disability Insurance, 1957–2009 (in millions of dollars)

Year	Receipts					Expenditures				Assets	
	Total	Net contributions ^a	Income from taxation of benefits	Net interest ^b	Payments from the general fund of the Treasury ^c	Total	Benefit payments ^d	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of year
1957	709	702	...	7	...	59	57	3	...	649	649
1958	991	966	...	25	...	261	249	12	...	729	1,379
1959	931	891	...	40	...	485	457	50	-22	447	1,825
1960	1,063	1,010	...	53	...	600	568	36	-5	464	2,289
1961	1,104	1,038	...	66	...	956	887	64	5	148	2,437
1962	1,114	1,046	...	68	...	1,183	1,105	66	11	-69	2,368
1963	1,165	1,099	...	66	...	1,297	1,210	68	20	-133	2,235
1964	1,218	1,154	...	64	...	1,407	1,309	79	19	-188	2,047
1965	1,247	1,188	...	59	...	1,687	1,573	90	24	-440	1,606
1966	2,079	2,006	...	58	16	1,947	1,784	137	25	133	1,739
1967	2,379	2,286	...	78	16	2,089	1,950	109	31	290	2,029
1968	3,454	3,316	...	106	32	2,458	2,311	127	20	996	3,025
1969	3,792	3,599	...	177	16	2,716	2,557	138	21	1,075	4,100
1970	4,774	4,481	...	277	16	3,259	3,085	164	10	1,514	5,614
1971	5,031	4,620	...	361	50	4,000	3,783	205	13	1,031	6,645
1972	5,572	5,107	...	414	51	4,759	4,502	233	24	813	7,457
1973	6,443	5,932	...	458	52	5,973	5,764	190	20	470	7,927
1974	7,378	6,826	...	500	52	7,196	6,957	217	22	182	8,109
1975	8,035	7,444	...	502	90	8,790	8,505	256	29	-754	7,354
1976	8,757	8,233	...	422	103	10,366	10,055	285	26	-1,609	5,745
1977	9,570	9,138	...	304	128	11,945	11,547	399	-1	-2,375	3,370
1978	13,810	13,413	...	256	142	12,954	12,599	325	30	856	4,226
1979	15,590	15,114	...	358	118	14,186	13,786	371	30	1,404	5,630
1980	13,871	13,255	...	485	130	15,872	15,515	368	-12	-2,001	3,629
1981	17,078	16,738	...	172	168	17,658	17,192	436	29	-580	3,049
1982	22,715	21,995	...	546	174	17,992	17,376	590	26	^e -358	2,691
1983	20,682	17,991	...	1,569	1,121	18,177	17,524	625	28	2,505	5,195
1984	17,309	15,945	190	1,174	...	18,546	17,898	626	22	-1,237	3,959
1985	19,301	17,191	222	870	1,017	19,478	18,827	608	43	^e 2,363	6,321
1986	19,439	18,399	238	803	...	20,522	19,853	600	68	^e 1,459	7,780
1987	20,303	19,691	-36	648	...	21,425	20,519	849	57	-1,122	6,658
1988	22,699	22,039	61	600	...	22,494	21,695	737	61	206	6,864
1989	24,795	23,993	95	707	...	23,753	22,911	754	88	1,041	7,905
1990	28,791	28,539	144	883	-775	25,616	24,829	707	80	3,174	11,079
1991	30,390	29,137	190	1,063	...	28,571	27,695	794	82	1,819	12,898
1992	31,430	30,136	232	1,062	...	32,004	31,112	834	58	-574	12,324
1993	32,301	31,185	281	835	...	35,662	34,613	966	83	-3,361	8,963
1994	52,841	51,373	311	1,157	...	38,879	37,744	1,029	106	13,962	22,925

(Continued)

4.A OASDI: Trust Funds

Table 4.A2—Disability Insurance, 1957–2009 (in millions of dollars)—Continued

Year	Receipts					Expenditures				Assets	
	Total	Net contributions ^a	Income from taxation of benefits	Net interest ^b	Payments from the general fund of the Treasury ^c	Total	Benefit payments ^d	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of year
1995	56,696	54,401	341	2,158	-203	42,055	40,923	1,064	68	14,641	37,566
1996	60,710	57,325	373	3,012	...	45,351	44,189	1,160	2	15,359	52,924
1997	60,499	56,037	470	3,992	...	47,034	45,695	1,280	59	13,465	66,389
1998	64,357	58,966	558	4,832	...	49,931	48,207	1,567	157	14,425	80,815
1999	69,541	63,203	661	5,677	f	53,035	51,381	1,519	135	16,507	97,321
2000	77,920	71,093	721	6,942	-836	56,782	54,983	1,639	159	21,138	118,459
2001	83,903	74,933	811	8,158	...	61,369	59,618	1,741	10	22,534	140,993
2002	87,379	77,272	930	9,178	...	67,905	65,702	2,049	154	19,475	160,468
2003	88,074	77,442	944	9,689	...	73,108	70,933	2,008	167	14,966	175,434
2004	91,380	80,281	1,111	9,988	0	80,597	78,229	2,152	215	10,783	186,217
2005	97,423	86,077	1,073	10,273	0	88,018	85,365	2,315	338	9,405	195,623
2006	102,641	90,808	1,230	10,603	...	94,456	91,741	2,326	388	8,185	203,808
2007	109,854	95,243	1,393	13,210	8	98,778	95,865	2,468	445	11,076	214,884
2008	109,840	97,566	1,313	10,961	...	108,951	106,007	2,526	418	889	215,773
2009	109,283	96,865	1,955	10,463	...	121,506	118,315	2,743	448	-12,223	203,550

SOURCE: Department of the Treasury.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

- Beginning in 1983, includes transfers from the general fund of the Treasury representing contributions that would have been paid on deemed wage credits for military service in 1957–2001, if such credits were considered to be covered wages.
- Net interest includes net profits or losses on marketable securities, and includes interest adjustments on amounts reimbursed from, or paid to, other trust funds or the general fund of the Treasury.
- Includes payments (1) in 1966 and later, for costs of noncontributory wage credits for military service performed before 1957; and (2) in 1971–1982, for costs of deemed wage credits for military service performed after 1956.
- Beginning in 1966, includes payments for vocational rehabilitation services furnished to disabled persons receiving benefits because of their disabilities. Beginning in 1983, amounts are reduced by amount of reimbursement for unnegotiated benefit checks.
- Amount equals total receipts less total expenditures, less amounts loaned or plus amounts repaid under interfund borrowing provisions.
- Between -\$500,000 and \$500,000.

CONTACT: Michael Stephens (410) 965-3028 or supplement@ssa.gov.

Table 4.A3—Combined OASI and DI, 1957–2009 (in millions of dollars)

Year	Receipts					Expenditures				Assets	
	Total	Net contributions ^a	Income from taxation of benefits	Net interest ^b	Payments from the general fund of the Treasury ^c	Total	Benefit payments ^d	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of year
1957	8,090	7,527	...	563	...	7,567	7,404	164	-2	523	23,042
1958	9,108	8,531	...	577	...	8,907	8,576	207	124	201	23,243
1959	9,516	8,943	...	572	...	10,793	10,298	234	260	-1,277	21,966
1960	12,445	11,876	...	569	...	11,798	11,245	240	314	647	22,613
1961	12,937	12,323	...	614	...	13,388	12,749	303	337	-451	22,162
1962	13,699	13,105	...	594	...	15,156	14,461	322	372	-1,457	20,705
1963	16,227	15,640	...	587	...	16,217	15,427	348	442	10	20,715
1964	17,476	16,843	...	633	...	17,020	16,223	375	422	456	21,172
1965	17,857	17,205	...	651	...	19,187	18,311	418	459	-1,331	19,841
1966	23,381	22,585	...	702	94	20,913	20,051	393	469	2,467	22,308
1967	26,413	25,424	...	896	94	22,471	21,417	515	539	3,942	26,250
1968	28,493	27,034	...	1,045	414	26,015	24,954	603	458	2,479	28,729
1969	33,346	31,546	...	1,342	458	27,892	26,767	612	513	5,453	34,182
1970	36,993	34,737	...	1,791	465	33,108	31,884	635	589	3,886	38,068
1971	40,908	38,343	...	2,027	538	38,542	37,197	719	626	2,366	40,434
1972	45,622	42,888	...	2,208	526	43,281	41,625	907	749	2,341	42,775
1973	54,787	51,907	...	2,386	494	53,148	51,508	837	802	1,639	44,414
1974	62,066	58,907	...	2,660	499	60,593	58,581	1,082	931	1,472	45,886
1975	67,640	64,259	...	2,866	515	69,184	67,022	1,152	1,010	-1,544	44,342
1976	75,034	71,595	...	2,722	717	78,242	75,759	1,244	1,239	-3,209	41,133
1977	81,982	78,710	...	2,531	741	87,254	84,667	1,379	1,208	-5,272	35,861
1978	91,903	88,883	...	2,264	757	96,018	92,960	1,440	1,618	-4,115	31,746
1979	105,864	103,034	...	2,155	675	107,320	104,359	1,483	1,477	-1,456	30,291
1980	119,712	116,711	...	2,330	670	123,550	120,598	1,522	1,430	-3,838	26,453
1981	142,438	139,364	...	2,231	843	144,352	140,995	1,743	1,614	-1,914	24,539
1982	147,913	145,667	...	1,391	854	160,111	156,182	2,109	1,820	^e 239	24,778
1983	171,266	156,328	...	8,276	6,662	171,177	166,745	2,153	2,279	89	24,867
1984	186,637	180,067	3,025	3,440	105	180,429	175,739	2,264	2,426	6,208	31,075
1985	203,540	194,149	3,430	2,741	3,220	190,628	186,075	2,200	2,353	^e 11,088	42,163
1986	216,833	209,140	3,662	3,871	160	201,522	196,667	2,202	2,653	^e 4,698	46,861
1987	231,039	222,425	3,221	5,338	55	209,093	204,106	2,373	2,614	21,946	68,807
1988	263,469	251,814	3,445	8,168	43	222,514	217,149	2,513	2,851	40,955	109,762
1989	289,448	274,189	2,534	12,692	34	236,242	230,882	2,427	2,934	53,206	162,968
1990	315,443	296,070	4,992	17,245	-2,864	253,135	247,816	2,270	3,049	62,309	225,277
1991	329,676	301,711	6,054	21,892	19	274,205	268,162	2,587	3,457	55,471	280,747
1992	342,591	311,128	6,084	25,365	14	291,865	285,995	2,664	3,206	50,726	331,473
1993	355,578	322,090	5,616	27,862	10	308,766	302,368	2,963	3,435	46,812	378,285
1994	381,111	344,695	5,306	31,103	7	323,011	316,812	2,674	3,526	58,100	436,385

(Continued)

4.A OASDI: Trust Funds

Table 4.A3—Combined OASI and DI, 1957–2009 (in millions of dollars)—Continued

Year	Receipts					Expenditures				Assets	
	Total	Net contributions ^a	Income from taxation of benefits	Net interest ^b	Payments from the general fund of the Treasury ^c	Total	Benefit payments ^d	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of year
1995	399,497	359,021	5,831	34,977	-332	339,815	332,554	3,141	4,120	59,683	496,068
1996	424,451	378,881	6,844	38,718	7	353,569	347,050	2,962	3,556	70,883	566,950
1997	457,668	405,984	7,896	43,787	2	369,108	361,952	3,409	3,747	88,560	655,510
1998	489,204	430,174	9,707	49,323	1	382,255	374,969	3,467	3,819	106,950	762,460
1999	526,582	459,556	11,559	55,466	f	392,908	385,765	3,328	3,816	133,673	896,133
2000	568,433	492,484	12,314	64,471	-836	415,121	407,635	3,788	3,698	153,312	1,049,445
2001	602,003	516,393	12,715	72,895	...	438,916	431,931	3,702	3,283	163,088	1,212,533
2002	627,085	532,471	13,839	80,362	414	461,653	453,821	4,185	3,647	165,432	1,377,965
2003	631,886	533,519	13,441	84,926	...	479,086	470,778	4,562	3,747	152,799	1,530,764
2004	657,718	553,040	15,703	88,974	1	501,644	493,263	4,536	3,844	156,075	1,686,839
2005	701,758	592,940	14,916	94,252	-350	529,938	520,748	5,272	3,917	171,821	1,858,660
2006	744,873	625,594	16,858	102,420	f	555,421	546,238	5,337	3,846	189,452	2,048,112
2007	784,889	656,121	18,585	110,176	8	594,501	584,939	5,542	4,020	190,388	2,238,500
2008	805,302	672,122	16,879	116,301	f	625,143	615,344	5,749	4,050	180,159	2,418,658
2009	807,490	667,257	21,884	118,349	f	685,801	675,482	6,182	4,137	121,689	2,540,348

SOURCE: Department of the Treasury.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

- Beginning in 1983, includes transfers from the general fund of the Treasury representing contributions that would have been paid on deemed wage credits for military service in 1957–2001, if such credits were considered to be covered wages.
- Net interest includes net profits or losses on marketable securities, and includes interest adjustments on amounts reimbursed from, or paid to, other trust funds or the general fund of the Treasury.
- Includes payments (1) in 1966 and later, for costs of noncontributory wage credits for military service performed before 1957; (2) in 1971–1982, for costs of deemed wage credits for military service performed after 1956; and (3) in 1968 and later, for costs of benefits to certain uninsured persons who attained age 72 before 1968.
- Beginning in 1966, includes payments for vocational rehabilitation services furnished to disabled persons receiving benefits because of their disabilities. Beginning in 1983, amounts are reduced by amount of reimbursement for unnegotiated benefit checks.
- Amount equals total receipts less total expenditures, plus amounts borrowed or less amounts repaid under interfund borrowing provisions.
- Between -\$500,000 and \$500,000.

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Table 4.A4—Total annual benefits paid, by type of benefit and trust fund, and as a percentage of personal income, selected years 1937–2009 (in millions of dollars)

Year	Total benefits	Cash benefits ^a		Service benefits		Rehabilitation services ^b		Personal income ^c	Total benefits as a percentage of personal income
		Old-Age and Survivors Insurance ^d	Disability Insurance	Hospital Insurance	Supplementary Medical Insurance ^e	Old-Age and Survivors Insurance	Disability Insurance		
1937	1	1	...	...	...	...	...	74,100	f
1938	10	10	...	...	...	...	...	68,400	f
1939	14	14	...	...	...	...	...	72,900	f
1940	35	35	...	...	...	...	...	78,400	f
1945	274	274	...	...	...	...	...	171,600	0.2
1950	961	961	...	...	...	...	...	228,900	0.4
1955	4,968	4,968	...	...	...	...	...	316,000	1.6
1960	11,245	10,677	568	...	...	...	...	411,300	2.7
1961	12,749	11,862	887	...	...	...	...	428,800	3.0
1962	14,461	13,356	1,105	...	...	...	...	456,400	3.2
1963	15,427	14,217	1,210	...	...	...	...	479,500	3.2
1964	16,223	14,914	1,309	...	...	...	...	514,300	3.2
1965	18,311	16,737	1,573	...	...	...	...	555,500	3.3
1966	21,070	18,267	1,781	891	128	⁹	3	603,800	3.5
1967	25,967	19,468	1,939	3,353	1,197	⁹	11	648,100	4.0
1968	30,651	22,642	2,294	4,179	1,518	1	16	711,700	4.3
1969	33,371	24,209	2,542	4,739	1,865	1	15	778,300	4.3
1970	38,982	28,796	3,067	5,124	1,975	2	18	838,600	4.6
1971	45,065	33,413	3,758	5,751	2,117	2	24	903,100	5.0
1972	50,269	37,122	4,473	6,318	2,325	2	29	992,600	5.1
1973	61,091	45,741	5,718	7,057	2,526	3	46	1,110,500	5.5
1974	70,996	51,618	6,903	9,099	3,318	5	54	1,222,700	5.8
1975	82,611	58,509	8,414	11,315	4,273	9	91	1,334,900	6.2
1976	94,180	65,699	9,966	13,340	5,080	6	89	1,474,700	6.4
1977	106,443	73,113	11,463	15,737	6,038	8	84	1,632,500	6.5
1978	117,894	80,352	12,513	17,682	7,252	9	86	1,836,700	6.4
1979	133,691	90,556	13,708	20,623	8,708	18	78	2,059,500	6.5
1980	156,298	105,074	15,437	25,064	10,635	8	78	2,301,500	6.8
1981	184,450	123,795	17,199	30,342	13,113	8	-8	2,582,300	7.1
1982	207,268	138,800	17,338	35,631	15,455	6	38	2,766,800	7.5
1983	224,524	149,502	17,530	39,337	18,106	6	42	2,952,200	7.6
1984	238,682	157,862	17,900	43,257	19,661	⁹	1	3,268,900	7.3
1985	256,723	167,360	18,836	47,580	22,947	⁹	⁹	3,496,700	7.3
1986	272,698	176,845	19,847	49,758	26,239	...	9	3,696,000	7.4
1987	284,487	183,644	20,512	49,496	30,820	...	16	3,924,400	7.2
1988	303,717	195,522	21,692	52,517	33,970	...	16	4,231,200	7.2
1989	329,193	207,977	22,873	60,011	38,294	...	38	4,557,500	7.2
1990	356,536	222,993	24,803	66,239	42,468	...	32	4,846,700	7.4
1991	386,912	240,436	27,662	71,549	47,229	...	36	5,031,500	7.7
1992	419,325	254,939	31,091	83,895	49,367	...	33	5,347,300	7.8
1993	449,896	267,804	34,598	93,487	53,979	...	28	5,568,100	8.1
1994	478,775	279,118	37,717	103,282	58,618	...	40	5,874,800	8.1

(Continued)

4.A OASDI: Trust Funds

Table 4.A4—Total annual benefits paid, by type of benefit and trust fund, and as a percentage of personal income, selected years 1937–2009 (in millions of dollars)—Continued

Year	Total benefits	Cash benefits ^a		Service benefits		Rehabilitation services ^b		Personal income ^c	Total benefits as a percentage of personal income
		Old-Age and Survivors Insurance ^d	Disability Insurance	Hospital Insurance	Supplementary Medical Insurance ^e	Old-Age and Survivors Insurance	Disability Insurance		
1995	513,959	291,682	40,898	116,368	64,972	...	39	6,200,900	8.3
1996	544,350	302,914	44,174	128,632	68,598	...	31	6,591,600	8.3
1997	572,542	316,311	45,659	137,762	72,757	...	53	7,000,700	8.2
1998	585,156	326,817	48,173	133,990	76,125	...	51	7,525,400	7.8
1999	595,326	334,437	51,331	128,766	80,724	...	68	7,910,800	7.5
2000	625,060	352,706	54,938	128,458	88,893	...	63	8,559,400	7.3
2001	672,853	372,370	59,577	141,183	99,663	...	60	8,883,300	7.6
2002	714,804	388,170	65,645	149,944	110,969	...	75	9,060,100	7.9
2003	746,756	399,892	70,906	152,084	123,825	3	47	9,378,100	8.0
2004	795,868	415,082	78,202	167,554	134,978	3	49	9,937,200	8.0
2005	850,058	435,373	85,394	180,013	149,228	58	-9	10,485,900	8.1
2006 ^h	954,837	460,457	92,384	188,989	212,941	4	61	11,268,100	8.5
2007 ^h	1,010,397	485,881	99,086	200,151	225,217	2	61	11,894,100	8.5
2008 ^h	1,077,021	509,056	106,301	232,299	229,287	4	75	12,238,800	8.8
2009	1,177,869	557,160	118,329	239,260	263,038	3	79	12,030,300	9.8

SOURCES: Department of the Treasury, Centers for Medicare & Medicaid Services, and Bureau of Economic Analysis.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

- a. The amounts of benefits paid generally do not reflect occasional adjustments such as reimbursements for uncashed checks, reimbursements to correct earlier accounting errors, and interfund transfers to correct earlier allocation errors.
- b. Vocational rehabilitation services to disabled workers and disabled children under the 1965 Amendments to the Social Security Act and to disabled widow(er)s under the 1967 Amendments to the Social Security Act.
- c. Figures are subject to revision.
- d. For 1937–1939, refunds and lump-sum death payments under the Social Security Act of 1935.
- e. Beginning with 2006, SMI amounts include both Part B and estimated Part D payments.
- f. Less than 0.05 percent.
- g. Between -\$500,000 and \$500,000.
- h. Revised data.

CONTACT: Michael Stephens (410) 965-3028 or supplement@ssa.gov.

**Table 4.A5—Total annual benefits paid from OASI trust fund, by type of benefit, selected years 1937–2009
(in millions of dollars)**

Year	Total	Retired-worker and dependents benefits			Survivors benefits				Special age-72 beneficiaries	Lump-sum death payments
		Retired workers	Wives and husbands	Children	Children	Widowed mothers and fathers	Widow(er)s ^a	Parents		
1937	1	...	...	...	...	...	...	...	...	1
1938	10	...	...	...	...	...	...	...	...	10
1939	14	...	...	...	...	...	...	...	...	14
1940	35	15	2	b	3	2	b	b	...	9
1945	274	126	21	2	52	27	20	1	...	26
1950	961	557	88	6	135	49	89	3	...	33
1955	4,968	3,253	466	29	532	163	396	16	...	113
1956	5,715	3,793	536	33	581	177	469	17	...	109
1957	7,347	4,888	756	43	651	198	653	19	...	139
1958	8,327	5,567	851	56	720	223	757	20	...	133
1959	9,842	6,548	982	77	855	263	921	25	...	171
1960	10,677	7,053	1,051	92	945	286	1,057	28	...	164
1961	11,862	7,802	1,124	106	1,080	316	1,232	31	...	171
1962	13,356	8,813	1,216	134	1,171	336	1,470	34	...	183
1963	14,217	9,391	1,258	146	1,222	348	1,612	34	...	206
1964	14,914	9,854	1,277	150	1,275	354	1,754	33	...	216
1965	16,737	10,984	1,383	175	1,515	388	2,041	35	...	217
1966	18,267	11,727	1,429	216	1,812	415	2,351	35	44	237
1967	19,468	12,372	1,456	221	1,855	420	2,545	34	313	252
1968	22,642	14,278	1,673	253	2,207	478	3,117	37	330	269
1969	24,209	15,385	1,750	260	2,322	490	3,371	36	303	291
1970	28,796	18,438	2,029	303	2,760	574	4,055	39	305	294
1971	33,413	21,544	2,323	352	3,168	630	4,763	41	285	306
1972	37,122	24,143	2,532	382	3,433	679	5,326	43	263	320
1973	45,741	29,336	3,000	457	4,002	801	7,505	48	264	329
1974	51,618	33,369	3,309	533	4,399	898	8,497	49	237	327
1975	58,509	38,079	3,719	634	4,888	1,009	9,597	50	196	337
1976	65,699	43,083	4,117	736	5,336	1,113	10,757	51	174	332
1977	73,113	48,186	4,559	830	5,759	1,191	12,068	52	157	312
1978	80,352	53,255	4,983	921	6,093	1,284	13,278	51	142	344
1979	90,556	60,379	5,554	1,014	6,608	1,409	15,071	52	128	340
1980	105,074	70,358	6,405	1,142	7,389	1,572	17,638	55	119	394
1981	123,795	83,614	7,543	1,321	8,307	1,760	20,749	58	110	332
1982	138,800	95,123	8,539	1,223	8,204	1,861	23,488	59	100	203
1983	149,502	103,578	9,328	1,143	7,911	1,771	25,425	56	85	205
1984	157,862	109,957	9,860	1,135	7,775	1,474	27,325	53	71	212
1985	167,360	116,823	10,517	1,140	7,762	1,474	29,330	51	57	207
1986	176,845	123,584	11,152	1,166	7,843	1,457	31,345	48	47	203
1987	183,644	128,513	11,598	1,183	7,846	1,388	32,833	44	36	203
1988	195,522	136,987	12,292	1,219	8,120	1,392	35,233	43	29	208
1989	207,977	146,027	13,054	1,249	8,254	1,401	37,723	41	21	206
1990	222,993	156,756	13,953	1,316	8,564	1,437	40,705	39	16	206
1991	240,436	169,142	14,986	1,405	9,022	1,490	44,139	38	12	202
1992	254,939	179,372	15,810	1,494	9,431	1,521	47,060	37	9	206
1993	267,804	188,440	16,356	1,563	9,897	1,547	49,746	36	6	214
1994	279,118	196,400	16,854	1,637	10,293	1,551	52,124	34	4	220

(Continued)

4.A OASDI: Trust Funds

Table 4.A5—Total annual benefits paid from OASI trust fund, by type of benefit, selected years 1937–2009 (in millions of dollars)—Continued

Year	Total	Retired-worker and dependents benefits			Survivors benefits				Special age-72 beneficiaries	Lump-sum death payments
		Retired workers	Wives and husbands	Children	Children	Widowed mothers and fathers	Widow(er)s ^a	Parents		
1995	291,682	205,315	17,348	1,715	10,717	1,573	54,761	32	3	218
1996	302,914	213,423	17,715	1,799	11,217	1,486	57,025	31	1	218
1997	316,311	223,554	18,154	1,882	11,660	1,466	59,349	30	1	216
1998	326,817	232,324	18,395	1,940	11,936	1,435	60,540	29	^b	218
1999	334,437	238,478	18,415	1,992	12,125	1,415	61,769	27	^b	216
2000	352,706	253,542	18,969	2,133	12,532	1,406	63,884	26	^b	214
2001	372,370	268,976	19,491	2,332	13,134	1,441	66,758	26	^b	212
2002	388,170	281,624	19,884	2,475	13,690	1,476	68,782	25	^b	213
2003	399,892	291,518	19,951	2,583	14,072	1,486	70,052	24	^b	206
2004	415,082	304,261	20,164	2,714	14,538	1,515	71,660	24	^b	205
2005	435,373	321,706	20,500	2,888	15,103	1,535	73,411	24	^b	206
2006	460,457	342,865	21,005	3,082	15,814	1,562	75,900	24	^b	204
2007	485,881	364,278	21,571	3,274	16,486	1,573	78,472	24	^b	203
2008	509,056	383,999	22,022	3,482	17,041	1,592	80,692	23	^b	205
2009	557,160	424,044	23,613	3,922	18,071	1,647	85,639	23	^b	201

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Amounts by type of benefit are estimated. The amounts of benefits paid generally do not reflect occasional adjustments such as reimbursements for uncashed checks, reimbursements to correct earlier accounting errors, and interfund transfers to correct earlier allocation errors.

Totals do not necessarily equal the sum of rounded components.

... = not applicable.

- a. Aged widow(er)s and disabled widow(er)s.
- b. Less than \$500,000.

CONTACT: Michael Stephens (410) 965-3028 or supplement@ssa.gov.

Table 4.A6—Total annual benefits paid from DI trust fund, by type of benefit, 1957–2009 (in millions of dollars)

Year	Total	Disabled workers	Wives and husbands	Children
1957	57	57	...	...
1958	249	246	1	1
1959	457	390	29	38
1960	568	489	32	48
1961	887	724	54	109
1962	1,105	888	68	149
1963	1,210	965	73	172
1964	1,309	1,044	79	186
1965	1,573	1,246	95	232
1966	1,781	1,394	108	280
1967	1,939	1,519	113	307
1968	2,294	1,804	131	360
1969	2,542	2,014	139	389
1970	3,067	2,448	165	454
1971	3,758	3,028	192	539
1972	4,473	3,626	224	623
1973	5,718	4,676	281	760
1974	6,903	5,662	320	920
1975	8,414	6,908	385	1,121
1976	9,966	8,190	447	1,328
1977	11,463	9,456	505	1,503
1978	12,513	10,315	541	1,657
1979	13,708	11,333	581	1,794
1980	15,437	12,816	638	1,983
1981	17,199	14,379	684	2,136
1982	17,338	14,811	652	1,875
1983	17,530	15,196	607	1,728
1984	17,900	15,623	536	1,741
1985	18,836	16,483	545	1,809
1986	19,847	17,409	547	1,890
1987	20,512	18,053	532	1,926
1988	21,692	19,165	529	1,999
1989	22,873	20,314	523	2,036
1990	24,803	22,113	531	2,159
1991	27,662	24,738	550	2,374
1992	31,091	27,856	572	2,663
1993	34,598	30,913	572	3,112
1994	37,717	33,711	579	3,428
1995	40,898	36,610	577	3,711
1996	44,174	39,625	515	4,034
1997	45,659	41,083	479	4,098
1998	48,173	43,467	457	4,249
1999	51,331	46,459	433	4,439
2000	54,938	49,848	421	4,670
2001	59,577	54,244	416	4,917
2002	65,645	59,886	423	5,337
2003	70,906	64,811	431	5,664
2004	78,202	71,685	455	6,062
2005	85,394	78,381	483	6,531
2006	92,384	84,952	509	6,923
2007	99,086	91,314	520	7,251
2008	106,301	98,104	534	7,664
2009	118,329	109,549	586	8,194

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Amounts by type of benefit are estimated. The amounts of benefits paid generally do not reflect occasional adjustments such as reimbursements for uncashed checks, reimbursements to correct earlier accounting errors, and interfund transfers to correct earlier allocation errors.

Totals do not necessarily equal the sum of rounded components.

... = not applicable.

CONTACT: Michael Stephens (410) 965-3028 or supplement@ssa.gov.

4.B OASDI: Covered Workers

Table 4.B1—Number of workers with taxable earnings, amount of earnings, and Social Security numbers issued, selected years 1937–2009

Year	Number ^a (thousands)			Earnings					Social Security numbers issued ^b (thousands)
	Total	With maximum earnings	New entrants into covered employment ^c	Total in covered employment ^d (millions of dollars)	Reported taxable ^a		Average per worker (dollars)		
					Amount (millions of dollars)	Percentage of total	Total earnings ^d	Reported taxable	
1937	32,900	1,031	32,900	32,200	29,620	92.0	979	900	37,139
1940	35,390	1,196	4,430	35,700	32,970	92.4	1,009	932	5,227
1945	46,390	6,361	3,480	71,600	62,950	87.9	1,543	1,357	3,321
1950	48,280	13,936	2,520	109,800	87,500	79.7	2,274	1,812	2,891
1951	58,120	14,270	6,000	148,900	120,770	81.1	2,562	2,078	4,927
1952	59,580	16,606	3,500	159,900	128,640	80.5	2,684	2,159	4,363
1953	60,840	19,013	3,090	173,000	135,870	78.5	2,844	2,233	3,464
1954	59,610	18,866	2,360	171,900	133,520	77.7	2,884	2,240	2,743
1955	65,200	16,704	4,760	196,100	157,540	80.3	3,008	2,416	4,323
1956	67,610	19,236	3,660	216,800	170,720	78.8	3,207	2,525	4,376
1957	70,590	21,095	3,380	233,900	181,380	77.5	3,314	2,569	3,639
1958	69,770	21,328	2,450	236,500	180,720	76.4	3,390	2,590	2,290
1959	71,700	19,112	3,180	255,000	202,310	79.3	3,556	2,822	3,388
1960	72,530	20,310	3,130	265,200	207,000	78.1	3,656	2,854	3,415
1961	72,820	21,265	2,990	270,700	209,640	77.4	3,717	2,879	3,370
1962	74,280	23,154	3,360	289,000	219,050	75.8	3,891	2,949	4,519
1963	75,540	24,570	3,520	302,300	225,550	74.6	4,002	2,986	8,617
1964	77,430	26,717	3,890	324,500	236,390	72.8	4,191	3,053	5,623
1965	80,680	29,136	4,620	351,700	250,730	71.3	4,359	3,108	6,131
1966	84,600	20,498	5,080	390,700	312,540	80.0	4,618	3,694	6,506
1967	87,040	22,948	4,530	422,300	329,960	78.1	4,852	3,791	5,920
1968	89,380	19,120	4,830	460,000	375,840	81.7	5,147	4,205	5,862
1969	92,060	22,577	5,160	502,800	402,550	80.1	5,462	4,373	6,289
1970	93,090	24,224	4,440	531,600	415,600	78.2	5,711	4,464	6,132
1971	93,340	26,404	4,470	559,700	426,960	76.3	5,996	4,574	6,401
1972	96,240	24,074	5,150	617,900	484,110	78.3	6,420	5,030	9,564
1973	99,830	20,250	5,670	686,700	561,850	81.8	6,879	5,628	10,038
1974	101,330	15,310	4,940	746,700	636,760	85.3	7,369	6,284	7,998
1975	100,200	15,070	4,120	787,600	664,660	84.4	7,860	6,633	8,164
1976	102,600	15,330	4,700	874,700	737,700	84.3	8,525	7,190	9,043
1977	105,800	15,700	5,070	960,100	816,550	85.0	9,075	7,718	7,724
1978	110,600	17,050	5,460	1,092,600	915,600	83.8	9,879	8,278	5,260
1979	112,700	11,236	4,883	1,222,200	1,067,000	87.3	10,845	9,468	5,213
1980	113,000	9,903	4,243	1,328,800	1,180,700	88.9	11,759	10,449	5,984
1981	113,000	8,594	4,090	1,450,900	1,294,100	89.2	12,840	11,452	5,581
1982	111,800	7,929	3,408	1,516,600	1,365,300	90.0	13,565	12,212	5,362
1983	112,100	7,044	3,914	1,615,200	1,454,100	90.0	14,409	12,971	6,699
1984	116,300	7,421	4,743	1,800,800	1,608,800	89.3	15,484	13,833	5,980
1985	119,800	7,766	4,756	1,936,800	1,722,600	88.9	16,167	14,379	5,720
1986	122,900	7,624	4,641	2,081,800	1,844,400	88.6	16,939	15,007	5,711
1987	125,600	7,735	4,956	2,237,000	1,960,000	87.6	17,811	15,605	11,621
1988	129,600	8,483	5,489	2,432,800	2,088,400	85.8	18,772	16,114	11,370
1989	131,700	8,110	4,856	2,578,700	2,239,500	86.8	19,580	17,005	8,049
1990	133,600	7,575	4,012	2,703,800	2,358,000	87.2	20,238	17,650	9,054
1991	133,000	7,483	3,541	2,760,500	2,422,500	87.8	20,756	18,214	7,509
1992	134,000	7,667	3,918	2,917,800	2,532,900	86.8	21,775	18,902	6,819
1993	136,100	7,617	4,204	3,022,900	2,636,100	87.2	22,211	19,369	5,893
1994	138,200	7,518	4,591	3,197,000	2,785,200	87.1	23,133	20,153	5,816

(Continued)

Table 4.B1—Number of workers with taxable earnings, amount of earnings, and Social Security numbers issued, selected years 1937–2009—Continued

Year	Number ^a (thousands)			Earnings					Social Security numbers issued ^b (thousands)
	Total	With maximum earnings	New entrants into covered employment ^c	Total in covered employment ^d (millions of dollars)	Reported taxable ^a		Average per worker (dollars)		
					Amount (millions of dollars)	Percentage of total	Total earnings ^d	Reported taxable	
1995	141,000	8,191	4,621	3,401,800	2,919,100	85.8	24,126	20,703	5,465
1996	143,400	8,682	4,620	3,587,600	3,073,500	85.7	25,018	21,433	5,533
1997	146,145	9,022	4,710	3,858,721	3,285,000	85.1	26,403	22,478	5,413
1998	148,786	9,372	4,904	4,172,641	3,524,900	84.5	28,045	23,691	5,288
1999	151,333	9,209	4,966	4,467,110	3,749,600	83.9	29,518	24,777	5,306
2000	154,732	9,556	5,014	4,819,870	4,008,500	83.2	31,150	25,906	5,476
2001	155,416	9,213	4,425	4,919,536	4,167,900	84.7	31,654	26,818	5,883
2002	154,893	8,416	4,279	4,938,294	4,250,100	86.1	31,882	27,439	5,699
2003	154,576	8,494	4,190	5,068,917	4,355,000	85.9	32,792	28,174	5,372
2004	156,405	9,225	4,641	5,370,545	4,554,500	84.8	34,337	29,120	6,065
2005	158,511	9,652	4,983	5,668,730	4,766,000	84.1	35,762	30,067	5,280
2006 ^e	160,944	9,735	5,153	6,025,616	5,042,200	83.7	37,439	31,329	5,662
2007 ^e	163,057	10,015	4,988	6,372,325	5,263,100	82.6	39,080	32,278	5,906
2008 ^f	162,485	9,711	4,329	6,483,270	5,434,139	83.8	39,901	33,444	5,785
2009 ^g	156,021	--	--	6,171,665	5,288,473	85.7	39,557	33,896	5,548

SOURCES: Social Security Administration, Master Earnings File, 1 percent sample; Bureau of Economic Analysis; Bureau of Labor Statistics.

NOTE: -- = not available.

- a. Relates to wage and salary workers from 1937 to 1950. Beginning in 1951, includes self-employment. Reported taxable earnings include Social Security taxable wages as reported by employers and Social Security taxable self-employment income as reported by self-employed individuals. See Table 2.A3 for annual maximum taxable earnings.
- b. Excludes railroad account numbers. Since program began, 453.7 million Social Security numbers have been issued. Some individuals have been issued more than one number.
- c. Workers reported with first taxable earnings under program in specified year. From 1937 to 2008, 342.1 million different persons reported with taxable earnings.
- d. Total wages, including estimated amounts above taxable limit, from 1937 to 1950. Beginning in 1951, also includes reported total net earnings of self-employed persons.
- e. Preliminary data.
- f. Taxable earnings are preliminary estimates based on Social Security data; employment data are preliminary estimates based on data from Bureau of Labor Statistics.
- g. Preliminary estimates based on data from Bureau of Labor Statistics and the Bureau of Economic Analysis.

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4.B OASDI: Covered Workers

Table 4.B2—Number with taxable earnings and amount of earnings, by type of earnings, 1951–2009

Year	Number ^a (thousands)		Wage and salary					Self-employed				
			Total in covered employment ^b (millions of dollars)	Reported taxable		Average per worker (dollars)		Total in covered employment ^c (millions of dollars)	Reported taxable		Average per worker (dollars)	
	Wage and salary	Self-employed		Amount ^d (millions of dollars)	Percentage of total wages	Total wages ^b	Reported taxable ^d		Amount ^d (millions of dollars)	Percentage of total self-employment	Total earnings ^c	Reported taxable ^d
1951	54,630	4,190	132,500	111,250	84.0	2,425	2,036	16,400	9,520	58.0	3,914	2,272
1952	56,060	4,240	143,500	118,880	82.8	2,560	2,121	16,400	9,760	59.5	3,868	2,302
1953	57,220	4,340	156,000	125,840	80.7	2,726	2,199	17,000	10,030	59.0	3,917	2,311
1954	55,940	4,350	155,100	123,410	79.6	2,773	2,206	16,800	10,110	60.2	3,862	2,324
1955	59,560	6,810	171,600	141,810	82.6	2,881	2,381	24,500	15,730	64.2	3,598	2,310
1956	61,560	7,390	188,500	153,010	81.2	3,062	2,486	28,300	17,710	62.6	3,829	2,396
1957	64,730	7,150	205,500	163,990	79.8	3,175	2,533	28,400	17,390	61.2	3,972	2,432
1958	64,040	7,130	208,000	163,140	78.4	3,248	2,547	28,500	17,580	61.7	3,997	2,466
1959	66,000	7,060	225,100	183,620	81.6	3,411	2,782	29,900	18,690	62.5	4,235	2,647
1960	66,980	6,870	236,000	188,580	79.9	3,523	2,815	29,200	18,420	63.1	4,250	2,681
1961	67,360	6,790	240,700	190,850	79.3	3,573	2,833	30,000	18,790	62.6	4,418	2,767
1962	68,890	6,720	257,700	200,130	77.7	3,741	2,905	31,300	18,920	60.4	4,658	2,815
1963	70,310	6,590	270,600	206,840	76.4	3,849	2,942	31,700	18,710	59.0	4,810	2,839
1964	72,230	6,480	290,900	217,430	74.7	4,027	3,010	33,600	18,960	56.4	5,185	2,926
1965	75,430	6,550	311,400	230,830	74.1	4,128	3,060	40,300	19,900	49.4	6,153	3,038
1966	79,460	6,630	346,700	287,860	83.0	4,363	3,623	44,000	24,680	56.1	6,637	3,722
1967	82,020	6,470	377,500	305,670	81.0	4,603	3,727	44,800	24,290	54.2	6,924	3,754
1968	84,470	6,570	413,600	348,500	84.3	4,896	4,126	46,400	27,340	58.9	7,062	4,161
1969	87,200	6,350	455,700	375,010	82.3	5,226	4,301	47,100	27,540	58.5	7,417	4,337
1970	88,180	6,270	483,600	388,680	80.4	5,484	4,408	48,000	26,920	56.1	7,656	4,293
1971	88,460	6,290	509,000	399,550	78.5	5,754	4,517	50,700	27,410	54.1	8,060	4,358
1972	91,220	6,600	563,300	452,050	80.3	6,175	4,956	54,600	32,060	58.7	8,273	4,858
1973	94,610	7,100	624,400	523,450	83.8	6,600	5,533	62,300	38,400	61.6	8,775	5,408
1974	96,190	7,040	681,600	594,400	87.2	7,086	6,179	65,200	42,360	65.0	9,261	6,017
1975	94,900	7,000	717,200	621,100	86.6	7,557	6,545	70,400	43,560	61.9	10,057	6,223
1976	97,230	7,400	797,200	689,200	86.4	8,199	7,088	76,800	48,500	63.2	10,378	6,554
1977	100,450	7,480	879,500	763,600	86.8	8,935	7,602	80,600	52,950	65.7	10,775	7,079
1978	104,810	8,040	998,900	856,100	85.7	9,531	8,168	93,700	59,500	63.5	11,654	7,400
1979	106,900	8,200	1,122,000	997,500	88.9	10,496	9,331	100,200	69,500	69.4	12,220	8,476
1980	107,200	8,200	1,231,000	1,109,000	90.1	11,483	10,345	97,800	71,700	73.3	11,927	8,744
1981	107,300	8,250	1,352,000	1,220,000	90.2	12,600	11,370	98,900	74,100	74.9	11,988	8,982
1982	105,800	8,550	1,418,000	1,290,000	91.0	13,403	12,193	98,600	75,300	76.4	11,532	8,807
1983	105,900	9,200	1,502,000	1,369,000	91.1	14,183	12,927	113,200	85,100	75.2	12,304	9,250
1984	109,900	9,900	1,671,500	1,515,000	90.6	15,209	13,785	129,300	93,800	72.5	13,061	9,475
1985	113,100	10,600	1,794,500	1,621,000	90.3	15,866	14,332	142,300	101,600	71.4	13,425	9,585
1986	115,900	11,200	1,921,000	1,730,800	90.1	16,575	14,934	160,800	113,600	70.6	14,357	10,143
1987	118,200	12,000	2,057,100	1,835,100	89.2	17,404	15,525	179,900	124,900	69.4	14,992	10,408
1988	122,100	12,400	2,224,700	1,952,000	87.7	18,220	15,987	208,100	136,400	65.5	16,782	11,000
1989	123,900	12,900	2,367,800	2,096,000	88.5	19,111	16,917	210,900	143,500	68.0	16,349	11,124
1990	126,100	12,500	2,510,000	2,222,000	88.5	19,905	17,621	193,800	136,000	70.2	15,504	10,880
1991	125,200	12,800	2,565,000	2,283,000	89.0	20,487	18,235	195,500	139,500	71.4	15,273	10,898
1992	126,000	13,100	2,711,000	2,386,000	88.0	21,516	18,937	206,800	146,600	71.0	15,786	11,214
1993	128,100	13,200	2,808,900	2,483,400	88.4	21,927	19,386	214,000	152,700	71.4	16,212	11,568
1994	130,100	13,300	2,964,100	2,624,500	88.5	22,783	20,173	232,900	160,700	69.0	17,511	12,083

(Continued)

Table 4.B2—Number with taxable earnings and amount of earnings, by type of earnings, 1951–2009—Continued

Year	Number ^a (thousands)		Wage and salary					Self-employed				
			Total in covered employment ^b (millions of dollars)	Reported taxable		Average per worker (dollars)		Total in covered employment ^c (millions of dollars)	Reported taxable		Average per worker (dollars)	
	Wage and salary	Self-employed		Amount ^d (millions of dollars)	Percentage of total wages	Total wages ^b	Reported taxable ^d		Amount ^d (millions of dollars)	Percentage of total self-employment	Total earnings ^c	Reported taxable ^d
	1995	132,800	13,500	3,159,100	2,754,300	87.2	23,788	20,740	242,700	164,800	67.9	17,978	12,207
1996	135,100	13,900	3,331,900	2,901,700	87.1	24,662	21,478	255,700	171,800	67.2	18,396	12,360
1997	137,765	14,020	3,586,721	3,104,300	86.5	26,035	22,533	272,000	180,700	66.4	19,401	12,889
1998	140,386	14,230	3,882,341	3,333,700	85.9	27,655	23,747	290,300	191,200	65.9	20,401	13,436
1999	142,703	14,500	4,159,210	3,547,300	85.3	29,146	24,858	307,900	202,300	65.7	21,234	13,952
2000	146,097	14,675	4,494,170	3,798,400	84.5	30,762	25,999	325,700	210,100	64.5	22,194	14,317
2001	146,596	14,930	4,586,990	3,950,100	86.1	31,290	26,945	332,546	217,800	65.5	22,274	14,588
2002	145,793	15,249	4,596,694	4,021,800	87.5	31,529	27,586	341,600	228,300	66.8	22,401	14,971
2003	145,101	15,969	4,708,439	4,114,000	87.4	32,449	28,353	360,478	241,000	66.9	22,574	15,092
2004	146,662	16,496	4,973,650	4,295,900	86.4	33,912	29,291	396,895	258,600	65.2	24,060	15,677
2005	148,530	17,098	5,231,330	4,490,500	85.8	35,221	30,233	437,400	275,500	63.0	25,582	16,113
2006 ^e	150,774	17,603	5,559,916	4,751,000	85.5	36,876	31,511	465,700	291,200	62.5	26,456	16,543
2007 ^e	152,622	18,262	5,890,525	4,966,700	84.3	38,596	32,542	481,800	296,400	61.5	26,383	16,230
2008 ^f	152,388	17,219	5,997,119	5,133,800	85.6	39,354	33,689	486,151	300,339	61.8	28,233	17,442
2009 ^g	146,173	16,558	5,714,324	4,997,476	87.5	39,093	34,189	457,341	290,997	63.6	27,621	17,574

SOURCES: Social Security Administration, Master Earnings File, 1 percent sample; Bureau of Economic Analysis; Bureau of Labor Statistics.

NOTE: See Table 4.B1 for wage and salary data before 1951.

- a. Represents total number in specified type of employment. Persons with both types of covered employment during the year are included in each type.
- b. Total wages, including estimated amounts above the taxable limit.
- c. Reported self-employment net earnings.
- d. Includes Social Security taxable wages as reported by employers and Social Security taxable self-employment income as reported by self-employed individuals. See Table 2.A3 for annual maximum taxable earnings.
- e. Preliminary data.
- f. Taxable earnings are preliminary estimates based on Social Security data; employment data are preliminary estimates based on data from Bureau of Labor Statistics.
- g. Preliminary estimates based on data from Bureau of Labor Statistics and the Bureau of Economic Analysis.

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4.B OASDI: Covered Workers

Table 4.B3—Number of workers and median annual earnings, by type of earnings and sex, selected years 1937–2008

Year	All workers ^a			Wage and salary			Self-employed ^b		
	Total	Men	Women	Subtotal	Men	Women	Subtotal	Men	Women
	<i>Number (thousands)^c</i>								
1937	32,900	23,810	9,090	32,900	23,810	9,090	...	...	...
1940	35,390	25,570	9,820	35,390	25,570	9,820	...	...	...
1945	46,390	28,820	17,570	46,390	28,820	17,570	...	...	...
1950	48,280	32,620	15,660	48,280	32,620	15,660	...	...	...
1955	65,200	43,140	22,060	59,560	38,240	21,320	6,810	5,980	830
1960	72,530	47,900	24,630	66,980	43,100	23,880	6,870	5,990	880
1965	80,680	51,990	28,690	75,430	47,500	27,930	6,550	5,640	910
1970	93,090	57,330	35,760	88,180	53,180	35,000	6,270	5,370	900
1975	100,200	59,520	40,680	94,900	55,140	39,760	7,000	5,790	1,210
1980	113,000	64,288	48,712	107,200	59,751	47,449	8,200	6,407	1,793
1985	119,800	66,113	53,687	113,100	61,285	51,815	10,600	7,623	2,977
1986	122,900	67,412	55,488	115,900	62,398	53,502	11,200	7,932	3,268
1987	125,600	68,591	57,009	118,200	63,306	54,894	12,000	8,450	3,550
1988	129,600	70,596	59,004	122,100	65,270	56,830	12,400	8,630	3,770
1989	131,700	71,517	60,183	123,900	66,105	57,795	12,900	8,842	4,058
1990	133,600	72,291	61,309	126,100	67,064	59,036	12,500	8,526	3,974
1991	133,000	71,787	61,213	125,200	66,406	58,794	12,800	8,669	4,131
1992	134,000	72,016	61,984	126,000	66,543	59,457	13,100	8,797	4,303
1993	136,100	73,154	62,946	128,100	67,673	60,427	13,200	8,840	4,360
1994	138,200	73,989	64,211	130,100	68,481	61,619	13,300	8,840	4,460
1995	141,000	75,444	65,556	132,800	69,900	62,900	13,500	8,908	4,592
1996	143,400	76,241	67,158	135,100	70,670	64,429	13,900	9,074	4,826
1997	146,145	77,498	68,647	137,765	71,910	65,855	14,020	9,078	4,942
1998	148,786	78,671	70,115	140,386	73,111	67,275	14,230	9,108	5,122
1999	151,333	80,042	71,291	142,703	74,376	68,327	14,500	9,224	5,276
2000	154,732	81,654	73,078	146,097	76,033	70,064	14,675	9,277	5,398
2001	155,416	82,006	73,410	146,596	76,303	70,293	14,930	9,354	5,576
2002	154,893	81,568	73,325	145,793	75,711	70,082	15,249	9,442	5,807
2003	154,576	81,263	73,313	145,101	75,200	69,901	15,969	9,860	6,109
2004	156,405	82,103	74,302	146,662	75,910	70,752	16,496	10,088	6,408
2005	158,511	83,073	75,438	148,530	76,758	71,772	17,098	10,395	6,703
2006 ^d	160,944	84,198	76,746	150,774	77,802	72,972	17,603	10,614	6,990
2007 ^d	163,057	85,112	77,945	152,622	78,675	73,947	18,262	10,836	7,426
2008 ^d	162,485	84,598	77,887	152,388	78,499	73,889	17,219	10,011	7,208

(Continued)

Table 4.B3—Number of workers and median annual earnings, by type of earnings and sex, selected years 1937–2008—Continued

Year	All workers ^a			Wage and salary			Self-employed ^b		
	Total	Men	Women	Subtotal	Men	Women	Subtotal	Men	Women
	<i>Median earnings ^e (dollars)</i>								
1937	761	945	484	761	945	484	...	...	...
1940	746	935	472	746	935	472	...	...	...
1945	1,159	1,654	770	1,159	1,654	770	...	...	...
1950	1,926	2,532	1,124	1,926	2,532	1,124	...	...	...
1955	2,438	3,315	1,351	2,383	3,348	1,338	2,397	2,550	1,552
1960	2,894	3,879	1,679	2,833	3,875	1,676	2,903	3,129	1,695
1965	3,414	4,685	1,984	3,319	4,630	1,979	3,858	4,242	1,898
1970	4,375	6,180	2,735	4,317	6,173	2,770	5,104	5,683	2,360
1975	5,803	8,250	3,730	5,790	8,315	3,794	6,700	7,846	3,113
1980	8,549	11,963	6,012	8,612	12,166	6,106	8,699	10,572	4,133
1985	11,265	14,959	8,293	11,638	15,706	8,525	9,877	12,301	5,529
1986	11,831	15,579	8,796	12,064	16,025	9,019	10,424	12,908	6,152
1987	12,327	16,073	9,261	12,576	16,559	9,500	10,886	13,401	6,573
1988	12,825	16,613	9,753	13,086	17,055	9,992	11,478	14,090	7,036
1989	13,314	17,014	10,265	13,762	17,800	10,577	11,602	14,538	7,010
1990	13,898	17,582	10,837	14,432	18,483	11,199	11,220	14,097	6,898
1991	14,278	17,765	11,369	14,859	18,730	11,767	11,125	13,703	7,186
1992	14,739	18,208	11,842	15,386	19,292	12,268	11,392	13,966	7,452
1993	15,000	18,430	12,093	15,665	19,516	12,546	11,595	14,128	7,720
1994	15,560	19,249	12,422	16,010	19,969	12,807	12,051	14,737	8,002
1995	16,108	19,907	12,897	16,618	20,672	13,296	12,198	14,931	8,301
1996	16,712	20,779	13,335	17,256	21,591	13,763	12,481	15,300	8,628
1997	17,562	21,814	14,043	18,127	22,693	14,482	12,910	15,911	8,944
1998	18,513	23,028	14,834	19,103	23,920	15,290	13,462	16,565	9,365
1999	19,265	23,927	15,465	19,885	24,839	15,938	14,051	17,338	9,784
2000	20,225	25,032	16,287	20,885	25,999	16,801	14,927	18,538	10,270
2001	20,905	25,643	17,037	21,629	26,647	17,595	15,010	18,681	10,470
2002	21,193	25,765	17,461	21,987	26,892	18,085	14,429	17,761	10,514
2003	21,610	26,173	17,845	22,473	27,364	18,497	14,512	17,998	10,678
2004	22,335	27,061	18,421	23,242	28,305	19,138	14,912	18,430	11,100
2005	22,985	27,886	18,886	23,905	29,154	19,633	15,543	19,289	11,559
2006 ^d	23,858	28,924	19,601	24,843	30,262	20,399	15,852	19,746	11,898
2007 ^d	24,600	29,755	20,370	25,683	31,181	21,219	15,465	19,263	12,031
2008 ^d	25,221	30,303	21,054	26,348	31,773	22,004	14,887	18,794	12,041

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTE: ... = not applicable.

- Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total.
- Not covered before 1951.
- Totals do not necessarily equal the sum of rounded components.
- Preliminary data.
- For all workers, medians relate to combined earnings from wage and salary employment and self-employment. For all wage and salary workers, medians relate to wages and salaries only.

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4.B OASDI: Covered Workers

Table 4.B4—Percentage of workers with earnings below annual maximum taxable, by sex, selected years 1937–2008

Year	All workers ^a			All self-employed workers			Annual maximum taxable earnings (dollars)
	Total	Men	Women	Total	Men	Women	
1937	96.9	95.8	99.7	...	...	...	3,000
1940	96.6	95.4	99.7	...	...	...	3,000
1945	86.3	78.6	98.9	...	...	...	3,000
1950	71.1	59.9	94.6	...	...	...	3,000
1951	75.5	64.6	96.7	65.4	62.6	83.3	3,600
1952	72.1	60.0	95.4	64.1	61.2	83.5	3,600
1953	68.8	55.5	93.8	62.9	59.5	83.1	3,600
1954	68.4	55.4	93.0	62.6	58.8	82.8	3,600
1955	74.4	63.4	95.9	74.0	72.3	86.3	4,200
1956	71.6	59.7	94.5	71.2	69.1	86.0	4,200
1957	70.1	58.7	93.1	69.6	67.2	85.5	4,200
1958	69.4	58.4	91.8	68.8	66.3	85.7	4,200
1959	73.3	62.7	94.3	72.0	69.6	88.0	4,800
1960	72.0	60.9	93.5	71.6	69.2	87.7	4,800
1961	70.8	59.6	92.4	70.3	67.8	86.9	4,800
1962	68.8	57.1	91.1	67.9	65.3	85.3	4,800
1963	67.5	55.5	90.0	66.3	63.4	85.3	4,800
1964	65.5	53.1	88.5	63.8	60.5	84.4	4,800
1965	63.9	51.0	87.3	59.5	55.8	82.5	4,800
1966	75.8	64.4	95.6	68.3	65.0	88.4	6,600
1967	73.6	61.5	94.2	66.7	63.2	87.5	6,600
1968	78.6	68.0	96.3	70.3	67.2	89.7	7,800
1969	75.5	62.8	96.0	68.3	65.0	89.1	7,800
1970	74.0	61.8	93.5	67.8	64.3	88.3	7,800
1971	71.7	59.1	91.7	66.7	63.3	86.2	7,800
1972	75.0	62.9	93.9	68.8	65.0	89.7	9,000
1973	79.7	68.9	96.2	71.1	67.4	91.0	10,800
1974	84.9	76.2	97.8	75.7	72.1	94.0	13,200
1975	84.9	76.4	97.5	77.8	74.4	93.9	14,100
1976	85.1	76.3	97.5	78.6	75.1	94.3	15,300
1977	85.2	76.3	97.5	79.3	75.8	94.1	16,500
1978	84.6	75.4	97.1	79.3	75.6	94.0	17,700
1979	90.0	83.6	98.6	84.3	81.3	95.9	22,900
1980	91.2	85.5	98.8	86.9	84.2	96.6	25,900
1981	92.4	87.4	99.0	89.4	87.1	97.2	29,700
1982	92.9	88.3	98.9	91.0	88.8	97.7	32,400
1983	93.7	89.6	99.0	92.0	90.0	97.7	35,700
1984	93.6	89.4	98.9	91.8	89.7	97.6	37,800
1985	93.5	89.3	98.8	92.0	89.8	97.5	39,600
1986	93.8	89.7	98.7	92.3	90.2	97.5	42,000
1987	93.9	89.9	98.6	92.5	90.4	97.5	43,800
1988	93.5	89.4	98.3	91.7	89.4	97.1	45,000
1989	93.8	90.1	98.3	92.4	90.1	97.3	48,000
1990	94.3	90.9	98.4	93.3	91.3	97.7	51,300
1991	94.4	91.1	98.3	93.6	91.6	97.7	53,400
1992	94.3	91.0	98.1	93.6	91.7	97.6	55,500
1993	94.4	91.3	98.1	93.7	91.9	97.4	57,600
1994	94.6	91.4	98.1	93.9	92.0	97.5	60,600

(Continued)

Table 4.B4—Percentage of workers with earnings below annual maximum taxable, by sex, selected years 1937–2008—Continued

Year	All workers ^a			All self-employed workers			Annual maximum taxable earnings (dollars)
	Total	Men	Women	Total	Men	Women	
1995	94.2	91.0	97.9	93.9	92.0	97.5	61,200
1996	93.9	90.6	97.7	93.9	92.0	97.4	62,700
1997	93.8	90.5	97.6	93.8	91.9	97.3	65,400
1998	93.7	90.3	97.5	94.0	92.2	97.3	68,400
1999	93.9	90.7	97.5	94.2	92.3	97.4	72,600
2000	93.8	90.6	97.4	92.5	90.1	96.6	76,200
2001	94.1	91.0	97.5	93.0	90.8	96.8	80,400
2002	94.6	91.8	97.7	94.9	93.2	97.7	84,900
2003	94.5	91.8	97.5	95.0	93.4	97.6	87,000
2004	94.1	91.2	97.3	94.8	93.1	97.5	87,900
2005	93.9	91.0	97.1	94.7	93.0	97.4	90,000
2006 ^b	94.0	91.1	97.1	95.0	93.2	97.7	94,200
2007 ^b	93.9	91.0	97.0	95.4	93.6	97.9	97,500
2008 ^b	94.0	91.2	97.0	95.6	93.9	98.0	102,000

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTE: . . . = not applicable.

- a. From 1937 to 1950, relates to wage and salary workers. Beginning in 1951, includes self-employed workers.
b. Preliminary data.

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4.B OASDI: Covered Workers

Table 4.B5—Number of workers, by sex and age, selected years 1937–2008 (in thousands)

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–61	62–64	65–69	70–71	72 or older
<i>All workers</i>															
1937	32,900	3,277	6,302	5,480	4,413	3,688	3,055	2,580	1,918	1,308	384	398	^a 97	...	...
1940	35,390	2,963	6,481	5,794	4,904	3,930	3,342	2,706	2,147	1,488	437	494	451	106	152
1945	46,390	6,313	5,908	5,571	5,495	5,288	4,623	4,061	3,275	2,577	831	926	975	214	333
1950	48,280	4,469	7,057	6,732	5,991	5,609	5,016	4,076	3,375	2,597	811	1,052	979	210	306
1955	65,200	5,410	7,065	7,499	7,801	7,458	7,222	6,507	5,299	4,261	1,423	1,893	2,091	537	734
1960	72,530	6,328	8,749	7,461	7,812	8,301	7,938	7,432	6,448	4,996	1,643	2,102	1,989	419	912
1965	80,680	8,556	11,066	8,261	7,488	8,120	8,550	7,936	7,163	5,931	1,943	2,272	2,027	424	943
1970	93,090	10,790	14,945	10,587	8,492	8,028	8,539	8,647	7,700	6,594	2,236	2,692	2,362	475	1,003
1975	100,200	11,939	16,419	13,852	10,304	8,644	7,997	8,157	7,896	6,626	2,289	2,543	2,139	444	951
1980	113,000	12,372	18,403	16,464	14,184	10,982	9,003	7,961	7,768	7,076	2,326	2,632	2,292	491	1,046
1985	119,800	10,685	17,727	18,012	16,193	14,276	10,961	8,713	7,435	6,870	2,410	2,726	2,206	489	1,097
1990	133,600	10,907	16,760	18,701	18,696	17,008	14,984	11,119	8,533	6,928	2,454	2,854	2,687	605	1,362
1995	141,000	10,832	15,465	17,078	18,692	18,760	16,918	14,622	10,510	7,667	2,440	2,777	2,836	699	1,704
1996	143,400	11,156	15,251	17,184	18,389	19,026	17,481	15,108	11,205	7,942	2,520	2,804	2,863	698	1,772
1997	146,145	11,402	15,486	17,156	18,033	19,279	17,964	15,369	12,023	8,453	2,569	2,902	2,913	731	1,865
1998	148,786	11,904	15,712	17,010	17,694	19,366	18,393	15,763	12,662	8,947	2,687	2,991	2,970	753	1,932
1999	151,333	12,241	16,106	16,754	17,517	19,407	18,769	16,318	13,297	9,332	2,759	3,087	3,013	771	1,962
2000	154,732	12,413	16,703	16,438	17,715	19,245	19,199	16,990	14,156	9,681	2,876	3,243	3,159	829	2,083
2001	155,416	11,753	16,981	16,081	17,688	18,783	19,336	17,449	14,571	10,288	2,989	3,331	3,230	828	2,107
2002	154,893	11,045	17,015	15,952	17,346	18,108	19,213	17,698	14,625	10,936	3,266	3,425	3,301	813	2,150
2003	154,576	10,483	17,018	15,904	16,940	17,527	19,069	17,879	14,831	11,387	3,506	3,554	3,425	825	2,226
2004	156,405	10,558	17,201	16,216	16,613	17,283	18,974	18,153	15,333	11,987	3,490	3,883	3,584	851	2,280
2005	158,511	10,850	17,359	16,654	16,179	17,312	18,694	18,414	15,845	12,591	3,416	4,181	3,754	904	2,357
2006 ^b	160,944	11,124	17,540	17,126	15,911	17,379	18,324	18,610	16,363	13,028	3,796	4,373	3,961	958	2,451
2007 ^b	163,057	11,122	17,676	17,504	16,027	17,298	17,936	18,711	16,795	13,284	4,467	4,422	4,279	968	2,570
2008 ^b	162,485	10,311	17,598	17,624	16,073	16,947	17,408	18,579	17,012	13,513	4,633	4,643	4,491	1,018	2,634
<i>Men</i>															
1937	23,810	2,020	4,021	3,797	3,237	3,775	2,387	2,091	1,606	1,110	330	351	^a 85	...	...
1940	25,570	1,821	4,072	4,028	3,545	2,922	2,550	2,151	1,770	1,265	373	434	403	96	140
1945	28,820	3,343	2,296	3,054	3,502	3,486	3,150	2,840	2,409	1,984	664	765	838	189	300
1950	32,620	2,530	4,215	4,497	4,135	3,889	3,419	2,827	2,417	1,951	635	843	815	181	266
1955	43,140	3,026	3,980	5,019	5,345	5,035	4,846	4,327	3,595	2,995	1,012	1,387	1,566	414	593
1960	47,900	3,748	5,455	5,148	5,464	5,591	5,188	4,818	4,183	3,336	1,125	1,480	1,392	293	697
1965	51,990	5,206	6,731	5,574	5,153	5,416	5,464	5,002	4,536	3,803	1,274	1,519	1,359	280	673
1970	57,330	6,308	8,639	6,760	5,564	5,126	5,287	5,242	4,671	4,084	1,392	1,730	1,522	321	684
1975	59,520	6,635	9,122	8,245	6,440	5,311	4,831	4,891	4,729	4,023	1,418	1,595	1,352	285	643
1980	64,288	6,620	9,971	9,278	8,206	6,372	5,178	4,590	4,516	4,152	1,391	1,597	1,411	309	697
1985	66,114	5,547	9,432	9,870	9,066	7,920	6,050	4,838	4,186	3,932	1,408	1,593	1,297	289	686
1990	72,292	5,690	8,835	10,131	10,251	9,216	7,977	5,976	4,651	3,857	1,381	1,619	1,526	358	823
1995	75,443	5,590	8,069	9,097	10,146	10,106	8,966	7,663	5,620	4,193	1,374	1,547	1,614	405	1,053
1996	76,241	5,672	7,876	9,074	9,935	10,198	9,240	7,873	5,963	4,307	1,416	1,569	1,629	403	1,086
1997	77,498	5,823	7,943	9,017	9,697	10,280	9,498	7,997	6,376	4,578	1,423	1,641	1,650	433	1,141
1998	78,671	6,068	8,029	8,895	9,472	10,345	9,684	8,196	6,673	4,835	1,476	1,690	1,688	444	1,177
1999	80,042	6,251	8,238	8,774	9,415	10,376	9,880	8,480	6,977	5,028	1,520	1,734	1,713	454	1,200
2000	81,654	6,323	8,544	8,573	9,492	10,285	10,102	8,838	7,365	5,184	1,588	1,796	1,805	488	1,271
2001	82,006	5,944	8,689	8,422	9,460	10,063	10,191	9,106	7,566	5,488	1,630	1,847	1,848	477	1,275
2002	81,568	5,562	8,691	8,297	9,282	9,713	10,113	9,241	7,575	5,799	1,768	1,884	1,883	461	1,299
2003	81,263	5,233	8,691	8,264	9,028	9,435	10,060	9,296	7,670	5,991	1,896	1,945	1,939	482	1,334
2004	82,103	5,233	8,798	8,418	8,834	9,279	10,025	9,441	7,932	6,268	1,880	2,106	2,025	495	1,369
2005	83,073	5,374	8,849	8,649	8,572	9,275	9,859	9,580	8,213	6,553	1,820	2,266	2,113	530	1,420
2006 ^b	84,198	5,530	8,923	8,879	8,408	9,249	9,655	9,668	8,483	6,759	2,008	2,367	2,221	565	1,483
2007 ^b	85,112	5,518	8,992	9,061	8,417	9,204	9,433	9,691	8,689	6,862	2,349	2,382	2,389	569	1,555
2008 ^b	84,598	5,105	8,933	9,123	8,407	8,959	9,156	9,616	8,745	6,965	2,430	2,468	2,499	591	1,600

(Continued)

Table 4.B5—Number of workers, by sex and age, selected years 1937–2008 (in thousands)—Continued

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–61	62–64	65–69	70–71	72 or older
<i>Women</i>															
1937	9,090	1,257	2,281	1,683	1,176	913	668	489	312	198	54	47	^a 12	...	...
1940	9,820	1,142	2,409	1,766	1,359	1,008	792	555	377	218	64	60	48	10	12
1945	17,570	2,970	3,612	2,517	1,993	1,802	1,473	1,221	866	593	167	161	137	25	33
1950	15,660	1,939	2,842	2,235	1,856	1,720	1,597	1,249	958	646	176	209	164	29	40
1955	22,060	2,384	3,085	2,480	2,456	2,423	2,376	2,180	1,704	1,266	411	506	525	123	141
1960	24,630	2,580	3,294	2,313	2,348	2,710	2,750	2,614	2,265	1,660	518	622	597	126	233
1965	28,690	3,350	4,335	2,687	2,335	2,704	3,086	2,934	2,627	2,128	669	753	668	144	270
1970	35,760	4,482	6,306	3,827	2,928	2,902	3,252	3,405	3,029	2,510	844	962	840	154	319
1975	40,680	5,304	7,297	5,607	3,864	3,333	3,166	3,266	3,167	2,603	871	948	787	159	308
1980	48,712	5,752	8,432	7,186	5,978	4,610	3,825	3,371	3,252	2,924	935	1,035	881	182	349
1985	53,686	5,138	8,295	8,142	7,127	6,356	4,911	3,875	3,249	2,938	1,002	1,233	909	200	411
1990	61,309	5,217	7,925	8,570	8,445	7,792	7,007	5,143	3,882	3,071	1,073	1,235	1,161	247	540
1995	65,557	5,241	7,396	7,981	8,546	8,654	7,951	6,959	4,891	3,474	1,066	1,230	1,222	295	651
1996	67,158	5,483	7,375	8,110	8,454	8,829	8,241	7,236	5,242	3,634	1,104	1,235	1,234	295	685
1997	68,647	5,579	7,543	8,139	8,336	8,998	8,466	7,372	5,648	3,875	1,146	1,261	1,264	298	724
1998	70,115	5,837	7,683	8,115	8,222	9,021	8,709	7,567	5,989	4,113	1,212	1,302	1,283	308	755
1999	71,291	5,990	7,868	7,980	8,102	9,031	8,889	7,838	6,321	4,304	1,239	1,353	1,299	317	762
2000	73,078	6,089	8,159	7,865	8,224	8,960	9,097	8,152	6,791	4,497	1,288	1,448	1,355	341	812
2001	73,410	5,809	8,293	7,658	8,228	8,721	9,144	8,344	7,005	4,800	1,358	1,484	1,383	351	833
2002	73,325	5,483	8,324	7,655	8,065	8,395	9,101	8,457	7,050	5,137	1,498	1,541	1,418	351	851
2003	73,313	5,250	8,327	7,640	7,912	8,093	9,010	8,583	7,161	5,396	1,610	1,609	1,487	343	892
2004	74,302	5,324	8,403	7,798	7,779	8,004	8,949	8,712	7,401	5,719	1,610	1,777	1,558	356	911
2005	75,438	5,475	8,511	8,005	7,607	8,038	8,835	8,834	7,633	6,038	1,595	1,914	1,641	374	937
2006 ^b	76,746	5,594	8,616	8,247	7,503	8,130	8,669	8,943	7,880	6,269	1,788	2,006	1,740	393	968
2007 ^b	77,945	5,604	8,684	8,443	7,610	8,093	8,504	9,019	8,106	6,421	2,119	2,039	1,890	399	1,015
2008 ^b	77,887	5,206	8,665	8,501	7,666	7,988	8,252	8,963	8,267	6,548	2,203	2,175	1,991	426	1,034

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTES: Age refers to age attained during year.

... = not applicable.

- a. Represents workers attaining age 65 during the year. Workers aged 65 or older were not covered under the program in that year.
 b. Preliminary data.

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4.B OASDI: Covered Workers

Table 4.B6—Median earnings of workers, by sex and age, selected years 1937–2008 (in dollars)

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–61	62–64	65–69	70–71	72 or older
<i>All workers</i>															
1937	761	170	570	829	998	1,061	1,126	1,121	1,177	1,020	1,010	927	^a 512	...	...
1940	746	140	498	764	934	1,041	1,064	1,110	1,071	1,018	978	963	874	924	788
1945	1,159	288	669	818	1,383	1,617	1,842	2,026	1,874	1,821	1,782	1,739	1,482	1,341	1,307
1950	1,926	385	1,376	1,971	2,312	2,456	2,473	2,517	2,442	2,394	2,492	2,252	1,973	1,916	1,589
1955	2,438	443	1,601	2,689	3,173	3,233	3,196	3,068	2,966	2,728	2,525	2,427	1,736	1,279	1,149
1960	2,894	561	1,917	3,138	3,738	3,903	3,891	3,785	3,643	3,452	3,166	3,052	1,590	1,140	1,252
1965	3,414	613	2,326	3,919	4,540	4,747	4,756	4,665	4,526	4,304	4,087	3,767	1,791	1,171	1,326
1970	4,375	810	2,988	5,334	6,156	6,339	6,357	6,292	6,105	5,831	5,473	5,047	2,099	1,578	1,683
1975	5,803	1,070	4,187	6,795	8,249	8,629	8,725	8,810	8,748	8,299	7,779	6,620	2,524	2,105	2,137
1980	8,549	1,646	6,205	9,593	11,510	12,540	12,690	12,784	12,794	12,309	11,606	9,651	4,451	3,306	3,140
1985	11,265	1,647	7,136	12,453	14,886	16,458	16,984	16,849	16,528	15,831	14,724	11,907	5,974	4,330	3,729
1990	13,898	1,937	8,054	14,687	17,482	19,296	20,664	20,958	20,157	18,584	17,163	13,021	6,812	5,375	4,536
1995	16,108	2,076	8,392	16,134	19,654	21,629	23,468	24,690	24,090	21,320	19,136	12,961	7,551	5,816	4,681
1996	16,712	2,140	8,562	16,664	20,327	22,311	24,116	25,317	25,176	22,083	19,718	13,408	7,692	6,217	4,861
1997	17,562	2,310	9,074	17,596	21,261	23,279	24,979	26,264	26,415	23,398	20,514	14,284	8,056	6,387	5,033
1998	18,513	2,515	9,763	18,666	22,453	24,345	25,971	27,390	27,609	24,688	21,372	15,229	8,431	6,747	5,302
1999	19,265	2,610	10,163	19,563	23,469	25,173	26,788	28,315	28,643	25,577	22,151	15,902	8,935	6,780	5,271
2000	20,225	2,716	10,721	20,597	24,817	26,385	27,814	29,403	29,529	26,698	22,884	16,499	9,465	7,295	5,376
2001	20,905	2,718	10,703	20,981	25,601	27,228	28,544	30,128	30,414	27,685	23,679	17,736	10,556	7,861	5,743
2002	21,193	2,677	10,353	20,945	25,904	27,724	28,992	30,338	30,998	28,380	24,470	18,563	11,158	8,192	5,911
2003	21,610	2,633	10,320	21,044	26,464	28,331	29,484	30,910	31,562	29,126	25,452	19,302	11,875	8,698	5,965
2004	22,335	2,715	10,689	21,496	27,312	29,513	30,533	31,931	32,730	30,376	26,463	20,740	12,585	9,173	6,313
2005	22,985	2,758	11,009	22,031	27,926	30,521	31,377	32,639	33,682	31,463	27,702	21,935	13,321	9,638	6,630
2006 ^b	23,858	2,823	11,434	22,863	28,844	31,769	32,723	33,817	34,824	32,775	29,169	23,353	14,017	10,174	6,950
2007 ^b	24,600	2,912	11,658	23,518	29,728	32,804	33,767	34,934	35,751	34,075	30,301	24,705	14,716	10,928	7,226
2008 ^b	25,221	2,931	11,464	23,926	30,252	33,585	34,568	35,666	36,436	35,048	31,396	26,158	15,490	11,457	7,445
<i>Men</i>															
1937	945	174	647	1,117	1,202	1,286	1,338	1,308	1,232	1,137	1,131	1,008	^a 563	...	...
1940	935	147	550	928	1,143	1,289	1,306	1,320	1,238	1,153	1,088	1,058	950	917	899
1945	1,654	271	422	813	1,983	2,245	2,405	2,364	2,319	2,170	2,106	2,000	1,666	1,462	1,390
1950	2,532	402	1,566	2,465	2,918	3,102	3,131	3,156	3,018	2,959	2,812	2,618	2,317	2,049	1,707
1955	3,315	468	1,871	3,450	4,079	4,201	4,159	4,005	3,818	3,512	3,201	3,044	2,164	1,498	1,292
1960	3,879	615	2,116	3,942	4,831	5,175	5,167	4,954	4,702	4,416	3,982	3,812	2,112	1,207	1,340
1965	4,685	710	2,609	4,957	6,055	6,481	6,519	6,369	5,921	5,581	4,993	4,784	2,628	1,246	1,443
1970	6,180	930	3,281	6,827	8,131	8,528	8,686	8,735	8,370	7,675	7,051	6,456	2,927	1,662	1,863
1975	8,250	1,246	4,870	8,464	11,170	12,131	12,533	12,605	12,270	11,290	10,398	8,700	2,895	2,276	2,371
1980	11,963	1,857	7,007	11,880	15,491	17,982	18,720	18,896	18,391	17,585	15,939	13,201	4,902	3,658	3,529
1985	14,959	1,771	8,185	14,465	18,642	22,021	24,433	24,385	23,841	22,117	19,953	16,532	6,760	4,977	4,351
1990	17,582	2,058	8,945	16,412	21,211	24,424	27,608	29,074	28,027	25,509	23,243	17,408	7,714	6,153	5,129
1995	19,907	2,164	9,618	17,810	23,200	26,912	29,732	32,334	32,505	28,260	24,673	17,090	8,133	6,430	4,977
1996	20,779	2,234	9,900	18,538	24,024	27,769	30,658	32,850	33,648	29,426	25,177	17,632	8,441	6,715	5,295
1997	21,814	2,379	10,356	19,748	25,231	28,874	31,790	33,738	34,890	31,018	26,229	18,159	8,832	7,097	5,300
1998	23,028	2,600	11,135	21,040	26,645	30,154	32,996	34,823	36,125	32,577	27,588	19,750	9,286	7,429	5,638
1999	23,927	2,718	11,616	22,200	27,805	31,113	33,946	35,717	36,924	33,428	28,382	20,172	9,873	7,323	5,594
2000	25,032	2,804	12,191	23,403	29,404	32,354	35,218	36,932	37,917	34,717	28,850	21,076	10,487	7,903	5,791
2001	25,643	2,788	12,002	23,500	30,130	33,117	35,801	37,426	38,348	35,287	29,886	21,976	12,010	8,566	6,229
2002	25,765	2,748	11,560	23,238	30,420	33,658	35,994	37,574	38,285	35,806	30,715	22,844	12,611	8,834	6,418
2003	26,173	2,726	11,391	23,365	30,891	34,302	36,542	38,150	38,699	36,390	31,540	23,854	13,402	9,470	6,338
2004	27,061	2,801	11,872	23,833	31,977	35,756	37,890	39,584	40,120	37,840	32,960	25,872	14,479	9,927	6,665
2005	27,886	2,832	12,297	24,508	32,630	36,928	39,016	40,529	41,153	38,932	34,468	27,355	15,343	10,531	7,040
2006 ^b	28,924	2,896	12,838	25,419	33,727	38,503	40,511	41,908	42,524	40,334	36,112	29,400	16,374	11,441	7,358
2007 ^b	29,755	2,989	13,029	26,047	34,438	39,718	41,754	43,291	43,736	41,646	37,293	30,453	17,455	12,256	7,733
2008 ^b	30,303	3,008	12,682	26,266	34,989	40,298	42,612	44,299	44,589	42,545	38,496	31,884	18,338	12,511	7,843

(Continued)

Table 4.B6—Median earnings of workers, by sex and age, selected years 1937–2008 (in dollars)—Continued

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–61	62–64	65–69	70–71	72 or older
<i>Women</i>															
1937	484	163	477	602	621	609	604	589	576	563	585	582	^a 366	...	...
1940	472	127	432	530	590	599	596	590	580	562	499	577	607	999	424
1945	770	307	811	821	871	971	1,026	1,018	987	955	946	899	832	766	928
1950	1,124	362	1,153	1,158	1,196	1,297	1,421	1,456	1,410	1,416	1,370	1,349	1,176	1,399	1,232
1955	1,351	408	1,312	1,406	1,430	1,586	1,706	1,775	1,768	1,622	1,542	1,445	1,057	949	802
1960	1,679	484	1,558	1,969	1,718	1,899	2,075	2,205	2,290	2,221	2,040	1,783	1,142	1,007	1,036
1965	1,984	539	1,852	2,067	2,069	2,243	2,478	2,660	2,715	2,764	2,678	2,372	1,208	1,054	1,093
1970	2,735	675	2,538	3,151	2,953	3,210	3,498	3,721	3,790	3,747	3,729	3,236	1,674	1,344	1,375
1975	3,730	905	3,287	4,800	4,454	4,512	4,870	5,168	5,340	5,300	5,020	4,055	2,189	1,895	1,715
1980	6,012	1,451	5,083	7,496	7,649	7,495	7,761	7,893	8,079	7,966	7,756	6,044	3,589	2,853	2,569
1985	8,293	1,524	6,063	10,251	10,986	11,169	11,163	11,072	10,898	10,714	10,133	7,728	4,959	3,671	3,067
1990	10,837	1,816	7,104	12,677	13,642	14,339	15,031	14,920	14,373	13,088	12,194	9,133	5,888	4,387	3,830
1995	12,897	1,991	7,232	14,249	15,853	16,547	18,068	18,732	17,937	16,030	14,147	9,882	6,910	5,120	4,376
1996	13,335	2,051	7,383	14,637	16,387	17,009	18,532	19,496	18,834	16,728	14,670	10,358	6,971	5,605	4,372
1997	14,043	2,243	7,873	15,238	17,150	17,801	19,277	20,325	19,989	17,750	15,762	11,003	7,331	5,638	4,687
1998	14,834	2,435	8,529	16,128	18,133	18,625	20,046	21,484	21,088	18,656	16,606	11,646	7,619	5,968	4,871
1999	15,465	2,519	8,928	16,897	18,823	19,283	20,688	22,265	22,129	19,594	17,168	12,324	8,032	6,245	4,876
2000	16,287	2,638	9,454	17,774	19,893	20,387	21,536	23,202	23,074	20,664	17,993	12,876	8,472	6,459	4,947
2001	17,037	2,649	9,536	18,341	20,736	21,114	22,222	24,035	24,149	21,797	18,733	14,055	9,214	7,117	5,200
2002	17,461	2,613	9,333	18,533	21,203	21,678	22,775	24,401	25,082	22,842	19,582	15,028	9,779	7,552	5,343
2003	17,845	2,554	9,367	18,674	21,750	22,317	23,192	24,933	25,806	23,486	20,506	15,520	10,424	7,947	5,469
2004	18,421	2,637	9,676	19,088	22,375	23,165	23,993	25,670	26,643	24,644	21,393	16,639	10,974	8,211	5,908
2005	18,886	2,693	9,914	19,486	22,876	23,949	24,583	26,051	27,450	25,593	22,290	17,442	11,496	8,609	6,240
2006 ^b	19,601	2,761	10,250	20,267	23,704	24,985	25,715	26,839	28,450	26,746	23,803	18,754	12,074	8,942	6,438
2007 ^b	20,370	2,842	10,486	20,972	24,752	25,988	26,545	27,741	29,143	27,990	24,994	20,158	12,600	9,680	6,680
2008 ^b	21,054	2,856	10,399	21,506	25,475	26,889	27,335	28,581	29,898	29,204	25,922	21,766	13,227	10,223	7,038

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTES: The amount of median earnings includes estimates above the taxable maximum.

Age refers to age attained during year.

... = not applicable.

a. Earnings of workers attaining age 65 during the year. Workers aged 65 or older not covered under program in that year.

b. Preliminary data.

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4.B OASDI: Covered Workers

**Table 4.B7—Number of wage and salary workers, by sex and amount of taxable earnings, 1992–2008
(in thousands)**

Year	Total	Workers with earnings below the taxable maximum (by dollar amount of earnings)											Workers with maximum earnings
		1–4,999	5,000–9,999	10,000–19,999	20,000–29,999	30,000–39,999	40,000–49,999	50,000–59,999	60,000–69,999	70,000–79,999	80,000–89,999	90,000–101,999	
<i>All wage and salary workers</i>													
1992	126,000	28,876	17,496	29,812	20,699	12,554	7,084	2,422	...	...	...	...	7,057
1993	128,100	29,050	17,521	29,900	21,134	12,786	7,371	3,325	...	...	...	...	7,013
1994	130,100	28,994	17,273	29,903	21,482	13,230	7,709	4,310	277	...	...	...	6,921
1995	132,800	28,568	17,213	30,142	22,097	13,853	8,171	4,662	498	...	...	...	7,597
1996	135,100	28,356	16,977	29,832	22,612	14,435	8,706	5,052	1,053	...	...	...	8,077
1997	137,765	27,554	16,853	29,676	23,076	15,243	9,330	5,523	2,106	...	...	...	8,405
1998	140,386	26,829	16,431	29,360	23,586	16,095	10,062	6,008	3,268	...	...	...	8,747
1999	142,703	26,421	16,261	28,975	23,861	16,763	10,546	6,456	3,974	856	...	...	8,589
2000	146,097	26,219	15,995	28,443	24,306	17,384	11,330	7,056	4,439	1,994	...	...	8,933
2001	146,596	25,700	15,596	27,746	23,983	17,661	11,776	7,462	4,730	3,151	177	...	8,614
2002	145,793	25,487	15,386	26,910	23,495	17,607	11,853	7,662	4,957	3,329	1,266	...	7,840
2003	145,101	25,005	15,160	26,247	22,988	17,541	11,996	7,794	5,173	3,467	1,821	...	7,909
2004	146,662	24,642	14,873	25,914	22,822	17,672	12,370	8,221	5,571	3,767	2,213	...	8,597
2005	148,530	24,414	14,720	25,683	22,867	17,910	12,719	8,559	5,821	3,972	2,878	...	8,987
2006 ^a	150,774	24,207	14,490	25,210	22,733	18,203	13,160	9,002	6,243	4,309	3,019	1,101	9,096
2007 ^a	152,622	23,882	14,283	24,883	22,545	18,305	13,459	9,447	6,605	4,598	3,271	1,954	9,392
2008 ^a	152,388	23,358	14,117	24,316	21,955	18,160	13,425	9,645	6,813	4,824	3,501	3,077	9,197
<i>Men</i>													
1992	66,543	12,914	7,726	13,773	11,128	8,069	5,109	1,868	...	...	...	...	5,955
1993	67,673	13,094	7,740	13,875	11,270	8,074	5,224	2,527	...	...	...	...	5,869
1994	68,481	12,898	7,546	13,836	11,360	8,211	5,372	3,243	222	...	...	...	5,794
1995	69,901	12,766	7,457	13,865	11,653	8,448	5,587	3,444	388	...	...	...	6,292
1996	70,670	12,510	7,261	13,491	11,791	8,667	5,838	3,672	800	...	...	...	6,641
1997	71,910	12,198	7,154	13,199	11,864	8,957	6,162	3,932	1,582	...	...	...	6,862
1998	73,111	11,864	6,936	12,868	11,946	9,297	6,520	4,199	2,406	...	...	...	7,074
1999	74,376	11,743	6,892	12,595	11,942	9,565	6,711	4,456	2,895	642	...	...	6,936
2000	76,033	11,680	6,788	12,241	11,958	9,755	7,070	4,734	3,170	1,474	...	...	7,163
2001	76,303	11,605	6,693	11,985	11,629	9,763	7,170	4,907	3,268	2,284	136	...	6,862
2002	75,711	11,627	6,664	11,693	11,258	9,612	7,065	4,925	3,341	2,372	937	...	6,217
2003	75,200	11,441	6,531	11,396	10,993	9,475	7,072	4,921	3,425	2,428	1,308	...	6,210
2004	75,910	11,184	6,448	11,236	10,812	9,423	7,216	5,111	3,659	2,588	1,562	...	6,670
2005	76,758	11,057	6,328	11,032	10,820	9,462	7,378	5,273	3,778	2,677	2,026	...	6,926
2006 ^a	77,802	10,993	6,223	10,760	10,622	9,517	7,524	5,456	4,003	2,869	2,069	787	6,978
2007 ^a	78,675	10,930	6,152	10,657	10,388	9,446	7,558	5,638	4,148	3,003	2,235	1,370	7,149
2008 ^a	78,499	10,846	6,182	10,380	10,099	9,256	7,375	5,644	4,193	3,104	2,320	2,128	6,972

(Continued)

**Table 4.B7—Number of wage and salary workers, by sex and amount of taxable earnings, 1992–2008
(in thousands)**

Year	Total	Workers with earnings below the taxable maximum (by dollar amount of earnings)											Workers with maximum earnings
		1– 4,999	5,000– 9,999	10,000– 19,999	20,000– 29,999	30,000– 39,999	40,000– 49,999	50,000– 59,999	60,000– 69,999	70,000– 79,999	80,000– 89,999	90,000– 101,999	
<i>Women</i>													
1992	59,457	15,962	9,770	16,039	9,571	4,485	1,975	554	...	...	...	...	1,103
1993	60,427	15,956	9,781	16,026	9,864	4,712	2,147	798	...	...	...	...	1,144
1994	61,619	16,097	9,726	16,068	10,122	5,020	2,337	1,067	55	...	...	...	1,127
1995	62,900	15,802	9,756	16,277	10,444	5,405	2,584	1,217	110	...	...	...	1,305
1996	64,429	15,847	9,716	16,341	10,819	5,768	2,868	1,380	253	...	...	...	1,437
1997	65,855	15,356	9,698	16,477	11,211	6,285	3,169	1,591	524	...	...	...	1,543
1998	67,275	14,965	9,495	16,492	11,640	6,798	3,541	1,808	862	...	...	...	1,673
1999	68,327	14,679	9,369	16,380	11,919	7,199	3,835	2,000	1,079	214	...	...	1,652
2000	70,064	14,539	9,206	16,203	12,348	7,630	4,260	2,321	1,268	519	...	...	1,770
2001	70,293	14,094	8,903	15,761	12,354	7,898	4,606	2,555	1,462	867	41	...	1,752
2002	70,082	13,860	8,721	15,218	12,237	7,995	4,788	2,737	1,617	958	329	...	1,624
2003	69,901	13,564	8,629	14,852	11,995	8,066	4,924	2,873	1,748	1,038	513	...	1,699
2004	70,752	13,458	8,426	14,678	12,010	8,249	5,154	3,110	1,912	1,179	650	...	1,926
2005	71,772	13,357	8,392	14,650	12,047	8,448	5,341	3,286	2,042	1,295	852	...	2,061
2006 ^a	72,972	13,214	8,267	14,449	12,112	8,686	5,636	3,546	2,241	1,440	950	314	2,118
2007 ^a	73,947	12,952	8,131	14,226	12,157	8,858	5,900	3,809	2,457	1,594	1,037	584	2,242
2008 ^a	73,889	12,512	7,935	13,936	11,856	8,904	6,050	4,000	2,620	1,720	1,181	949	2,225

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTES: Taxable earnings consist of self-employment income and taxable wages.

Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Preliminary data.

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4.B OASDI: Covered Workers

Table 4.B8—Number of self-employed workers, by sex and age, selected years 1951–2008
(in thousands)

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–61	62–64	65–69	70–71	72 or older
<i>All self-employed workers</i>															
1951	4,190	6	71	246	414	543	592	565	503	462	164	215	237	55	117
1955	6,810	18	114	362	600	757	865	874	790	737	290	441	497	143	322
1960	6,870	19	133	305	560	743	848	929	918	846	316	452	414	101	286
1965	6,550	31	143	292	452	664	814	870	913	885	328	411	388	92	267
1970	6,270	33	159	348	476	581	729	808	837	839	327	407	388	94	244
1975	7,000	67	302	581	679	700	731	813	869	823	317	382	393	95	248
1980	8,200	78	380	824	1,052	983	869	812	851	852	307	381	419	112	280
1985	10,600	112	527	1,099	1,488	1,522	1,261	1,030	930	929	368	434	455	124	321
1990	12,500	152	529	1,123	1,663	1,854	1,736	1,377	1,113	980	381	487	567	150	389
1991	12,800	136	521	1,105	1,697	1,897	1,818	1,474	1,170	998	388	486	561	158	391
1992	13,100	137	509	1,093	1,678	1,951	1,864	1,589	1,243	1,018	382	484	576	166	410
1993	13,200	131	488	1,029	1,650	1,956	1,892	1,647	1,325	1,047	375	481	589	164	426
1994	13,300	140	473	989	1,624	1,936	1,945	1,726	1,357	1,070	375	482	580	164	437
1995	13,500	143	482	1,005	1,612	1,960	1,964	1,808	1,393	1,097	385	467	574	166	445
1996	13,900	147	490	1,036	1,614	2,013	2,035	1,873	1,471	1,144	404	475	575	164	458
1997	14,020	151	498	1,030	1,548	1,978	2,053	1,874	1,555	1,203	402	485	592	169	483
1998	14,230	162	510	1,045	1,524	1,963	2,092	1,885	1,616	1,265	415	493	590	178	492
1999	14,500	171	535	1,040	1,521	1,965	2,088	1,969	1,684	1,322	420	514	595	174	502
2000	14,675	173	554	1,016	1,495	1,948	2,093	2,014	1,785	1,345	443	522	591	180	515
2001	14,930	173	598	1,036	1,526	1,907	2,113	2,042	1,825	1,421	457	526	610	178	519
2002	15,858	175	700	1,112	1,626	1,898	2,191	2,158	1,911	1,578	537	585	651	172	564
2003	15,969	176	703	1,123	1,638	1,915	2,209	2,177	1,924	1,588	541	587	652	173	565
2004	16,496	189	747	1,194	1,643	1,948	2,236	2,228	1,992	1,684	533	649	691	183	580
2005	17,098	211	815	1,281	1,662	2,013	2,256	2,283	2,066	1,764	528	691	739	194	595
2006 ^a	17,603	215	865	1,368	1,652	2,066	2,239	2,335	2,131	1,836	578	719	777	212	610
2007 ^a	18,262	230	929	1,451	1,714	2,110	2,222	2,386	2,212	1,869	688	738	839	223	651
2008 ^a	17,219	216	891	1,409	1,603	1,931	2,008	2,207	2,073	1,782	661	720	852	217	650
<i>Men</i>															
1951	3,620	5	61	219	370	478	519	479	430	393	139	179	204	47	97
1955	5,980	16	104	335	555	687	773	773	679	631	247	373	420	122	265
1960	5,990	16	119	284	515	678	757	812	793	709	260	386	348	83	230
1965	5,640	26	127	263	410	598	714	759	772	742	272	339	326	75	217
1970	5,370	28	136	306	422	522	642	699	712	695	268	324	320	77	201
1975	5,790	57	251	479	564	584	619	680	715	672	255	309	326	78	201
1980	6,407	60	305	639	793	752	672	641	681	668	244	301	333	92	226
1985	7,623	79	378	782	1,060	1,058	873	730	674	686	278	328	351	97	249
1990	8,525	103	346	746	1,112	1,241	1,148	914	762	693	270	355	424	116	295
1991	8,668	92	341	726	1,109	1,268	1,204	976	793	699	273	350	418	119	299
1992	8,798	89	330	714	1,090	1,289	1,228	1,041	830	706	271	344	427	126	312
1993	8,840	89	310	674	1,075	1,290	1,241	1,078	885	713	261	341	436	125	322
1994	8,839	89	309	638	1,053	1,269	1,268	1,127	890	723	263	333	423	122	331
1995	8,908	97	305	648	1,030	1,271	1,281	1,170	906	735	269	325	413	124	335
1996	9,074	94	306	658	1,021	1,281	1,322	1,200	954	754	276	328	415	119	346
1997	9,078	98	311	638	975	1,245	1,313	1,197	997	788	275	334	420	122	365
1998	9,109	98	314	641	947	1,217	1,326	1,188	1,033	819	275	338	415	130	368
1999	9,225	107	319	632	948	1,207	1,314	1,240	1,063	844	279	352	415	127	377
2000	9,277	106	328	604	913	1,193	1,310	1,268	1,128	856	294	348	415	130	383
2001	9,354	102	345	613	912	1,163	1,320	1,280	1,145	893	297	349	426	129	379
2002	9,778	109	395	636	955	1,147	1,333	1,331	1,187	983	338	380	445	124	415
2003	9,860	109	397	645	964	1,160	1,347	1,346	1,195	990	341	381	446	125	416
2004	10,088	111	410	682	951	1,165	1,343	1,373	1,233	1,045	338	417	471	128	423
2005	10,395	126	448	722	958	1,185	1,352	1,398	1,272	1,093	328	441	500	139	433
2006 ^a	10,613	125	466	767	943	1,190	1,331	1,420	1,306	1,139	357	456	522	152	441
2007 ^a	10,836	134	492	789	955	1,200	1,304	1,417	1,340	1,134	426	461	554	156	473
2008 ^a	10,011	120	450	741	867	1,062	1,153	1,283	1,234	1,070	413	446	556	150	467

(Continued)

**Table 4.B8—Number of self-employed workers, by sex and age, selected years 1951–2008
(in thousands)—Continued**

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–61	62–64	65–69	70–71	72 or older
<i>Women</i>															
1951	570	1	10	27	44	65	73	86	73	69	25	36	33	8	20
1955	830	2	10	27	45	70	92	101	111	106	43	68	77	21	57
1960	880	3	14	21	45	65	91	117	125	137	56	66	67	18	55
1965	910	5	16	29	42	66	100	111	141	143	56	72	62	17	50
1970	900	5	23	42	54	59	87	109	125	144	59	65	68	17	43
1975	1,210	10	51	102	115	116	112	133	154	151	62	73	67	17	47
1980	1,793	18	75	185	259	231	197	171	170	184	63	80	86	20	54
1985	2,977	33	149	317	428	464	388	300	256	243	90	106	104	27	72
1990	3,975	49	183	377	551	613	588	463	350	287	111	132	142	34	94
1991	4,131	44	180	378	588	629	614	499	376	299	115	136	143	39	92
1992	4,302	48	179	380	588	662	636	548	413	312	110	140	148	39	98
1993	4,360	41	178	355	575	666	651	569	440	334	114	140	153	39	104
1994	4,460	51	164	352	572	667	677	599	468	346	112	148	157	42	105
1995	4,592	46	177	357	582	689	683	638	487	362	116	142	161	42	109
1996	4,826	54	183	377	594	733	713	673	517	390	128	147	160	45	112
1997	4,942	54	188	392	572	733	739	676	558	415	128	151	172	47	118
1998	5,121	65	196	404	577	746	767	697	583	445	140	155	175	48	124
1999	5,276	64	216	408	573	757	773	729	621	478	141	162	180	47	126
2000	5,398	68	226	412	582	754	783	747	657	489	148	173	176	50	132
2001	5,576	71	253	423	614	744	793	762	680	528	160	177	184	49	139
2002	6,080	66	305	475	671	751	858	827	724	595	199	205	206	48	148
2003	6,109	67	305	478	675	755	862	831	729	598	200	206	206	49	149
2004	6,408	77	338	512	692	784	893	855	758	640	195	232	220	55	157
2005	6,703	85	367	560	704	828	904	885	795	672	201	250	238	54	162
2006 ^a	6,990	90	399	600	709	875	908	915	826	698	220	263	256	60	169
2007 ^a	7,426	95	437	662	759	910	918	968	872	735	262	278	284	67	178
2008 ^a	7,208	95	442	668	736	868	855	924	839	712	249	274	296	66	183

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTES: Age refers to age attained during year.

Totals do not necessarily equal the sum of rounded components.

a. Preliminary data.

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4.B OASDI: Covered Workers

Table 4.B9—Number of self-employed workers, by sex and amount of taxable earnings, 1992–2008
(in thousands)

Year	Total	Workers with earnings below taxable maximum (by dollar amount of earnings)											Workers with maximum earnings
		1–4,999	5,000–9,999	10,000–19,999	20,000–29,999	30,000–39,999	40,000–49,999	50,000–59,999	60,000–69,999	70,000–79,999	80,000–89,999	90,000–101,999	
<i>All self-employed workers</i>													
1992	13,098	3,520	2,519	2,755	1,576	971	612	308	...	...	...	...	839
1993	13,202	3,453	2,562	2,776	1,570	990	633	388	...	...	...	...	828
1994	13,297	3,376	2,510	2,832	1,586	1,019	645	426	92	...	...	...	814
1995	13,499	3,316	2,593	2,882	1,604	1,044	678	444	116	...	...	...	822
1996	13,900	3,312	2,667	2,964	1,650	1,092	713	471	176	...	...	...	854
1997	14,019	3,237	2,674	2,966	1,670	1,100	737	489	278	...	...	...	869
1998	14,237	3,160	2,675	3,010	1,717	1,157	777	505	387	...	...	...	848
1999	14,499	3,057	2,688	3,075	1,756	1,191	804	535	384	162	...	...	848
2000	14,672	2,974	2,618	3,019	1,730	1,189	811	560	399	269	...	...	1,104
2001	14,930	2,998	2,627	3,123	1,741	1,186	834	584	400	314	82	...	1,042
2002	15,249	3,100	2,710	3,305	1,777	1,202	850	601	426	305	197	...	776
2003	15,969	3,178	2,840	3,489	1,852	1,254	899	641	441	327	250	...	798
2004	16,496	3,204	2,861	3,639	1,919	1,277	950	672	472	350	300	...	852
2005	17,098	3,167	2,920	3,745	2,006	1,372	990	724	508	375	388	...	902
2006 ^a	17,603	3,208	2,936	3,882	2,060	1,404	1,025	747	550	406	309	200	877
2007 ^a	18,262	3,409	3,064	4,040	2,071	1,386	1,040	779	575	422	328	300	848
2008 ^a	17,219	3,274	2,894	3,930	1,842	1,244	935	713	535	404	317	376	756
<i>Men</i>													
1992	8,795	1,891	1,606	1,936	1,145	746	485	252	...	...	...	...	734
1993	8,841	1,850	1,632	1,927	1,141	760	500	316	...	...	...	...	715
1994	8,839	1,779	1,552	1,958	1,153	772	503	340	77	...	...	...	705
1995	8,908	1,748	1,581	1,964	1,152	782	521	356	96	...	...	...	708
1996	9,075	1,715	1,598	1,997	1,176	807	545	367	141	...	...	...	729
1997	9,077	1,683	1,550	1,980	1,171	796	559	381	223	...	...	...	735
1998	9,116	1,632	1,518	1,955	1,189	831	584	389	309	...	...	...	710
1999	9,224	1,569	1,497	1,972	1,202	848	591	409	299	129	...	...	709
2000	9,277	1,519	1,425	1,908	1,159	830	585	415	304	211	...	...	920
2001	9,354	1,519	1,428	1,934	1,159	812	596	423	305	247	66	...	865
2002	9,442	1,590	1,458	2,024	1,175	823	594	439	310	231	155	...	643
2003	9,860	1,637	1,521	2,103	1,228	853	637	461	324	248	194	...	654
2004	10,088	1,636	1,516	2,144	1,252	868	663	480	346	260	230	...	694
2005	10,395	1,616	1,532	2,166	1,297	920	687	511	368	276	295	...	727
2006 ^a	10,613	1,634	1,522	2,192	1,316	928	703	520	397	299	230	156	718
2007 ^a	10,836	1,726	1,585	2,231	1,297	895	696	536	402	305	242	230	691
2008 ^a	10,011	1,648	1,461	2,080	1,145	790	612	488	369	288	229	286	615

(Continued)

**Table 4.B9—Number of self-employed workers, by sex and amount of taxable earnings, 1992–2008
(in thousands)**

Year	Total	Workers with earnings below taxable maximum (by dollar amount of earnings)											Workers with maximum earnings
		1–4,999	5,000–9,999	10,000–19,999	20,000–29,999	30,000–39,999	40,000–49,999	50,000–59,999	60,000–69,999	70,000–79,999	80,000–89,999	90,000–101,999	
<i>Women</i>													
1992	4,303	1,628	913	819	431	225	127	55	...	...	...	...	105
1993	4,361	1,604	930	849	429	230	133	73	...	...	...	...	113
1994	4,458	1,596	957	873	435	246	142	85	15	...	...	...	109
1995	4,591	1,569	1,012	918	452	261	157	88	20	...	...	...	114
1996	4,825	1,597	1,069	967	475	285	168	104	35	...	...	...	125
1997	4,942	1,554	1,125	986	499	303	178	108	55	...	...	...	134
1998	5,121	1,529	1,157	1,056	528	327	193	116	78	...	...	...	138
1999	5,276	1,488	1,191	1,103	554	343	212	126	85	33	...	...	139
2000	5,395	1,454	1,192	1,111	570	359	226	145	95	58	...	...	184
2001	5,576	1,479	1,198	1,189	581	374	238	161	95	67	17	...	177
2002	5,807	1,510	1,252	1,281	602	379	256	162	116	74	42	...	133
2003	6,109	1,541	1,320	1,385	625	401	262	180	117	79	55	...	145
2004	6,408	1,568	1,345	1,495	667	409	288	192	126	90	70	...	159
2005	6,703	1,551	1,388	1,579	709	452	303	213	140	99	93	...	175
2006 ^a	6,990	1,574	1,414	1,690	744	476	323	227	153	107	80	44	159
2007 ^a	7,426	1,683	1,479	1,809	774	491	344	242	172	117	86	70	157
2008 ^a	7,208	1,626	1,433	1,850	698	454	322	225	165	117	88	89	142

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTES: Taxable earnings consist of self-employment income and taxable wages.

Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Preliminary data.

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4.B OASDI: Covered Workers

Table 4.B10—Number of workers with Social Security (OASDI) taxable earnings, amount taxable, and contributions, by state or other area and type of earnings, 2008

State or area ^a	Number ^b (thousands)			Taxable earnings ^c (millions of dollars)			OASDI contributions ^d (millions of dollars)		
	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed
All areas	162,485	152,388	17,219	5,434,139	5,133,800	300,339	673,833	636,591	37,242
Alabama	2,375	2,234	249	71,412	67,778	3,633	8,855	8,405	451
Alaska	389	367	43	13,259	12,422	837	1,644	1,540	104
Arizona	2,984	2,835	276	97,870	93,581	4,290	12,136	11,604	532
Arkansas	1,483	1,391	155	40,492	38,258	2,234	5,021	4,744	277
California	17,118	15,656	2,245	630,474	584,470	46,003	78,179	72,474	5,704
Colorado	2,522	2,337	311	86,744	81,005	5,738	10,756	10,045	712
Connecticut	2,013	1,880	224	80,320	74,765	5,556	9,960	9,271	689
Delaware	529	509	36	18,350	17,801	549	2,275	2,207	68
District of Columbia	397	379	33	16,959	16,045	914	2,103	1,990	113
Florida	9,193	8,571	1,070	282,508	268,310	14,198	35,031	33,270	1,761
Georgia	4,750	4,449	528	152,602	145,115	7,487	18,923	17,994	928
Hawaii	732	686	76	25,081	23,737	1,344	3,110	2,943	167
Idaho	781	733	84	22,587	21,277	1,309	2,801	2,638	162
Illinois	6,648	6,237	711	231,937	219,716	12,221	28,760	27,245	1,515
Indiana	3,699	3,534	318	113,132	107,999	5,133	14,028	13,392	636
Iowa	1,771	1,660	202	53,501	50,172	3,329	6,634	6,221	413
Kansas	1,602	1,514	165	50,918	47,969	2,949	6,314	5,948	366
Kentucky	2,201	2,072	225	63,079	59,783	3,295	7,822	7,413	409
Louisiana	2,184	2,043	242	65,950	62,017	3,932	8,178	7,690	488
Maine	773	716	92	21,934	20,426	1,507	2,720	2,533	187
Maryland	3,231	3,065	304	131,421	125,799	5,622	16,296	15,599	697
Massachusetts	3,540	3,300	386	137,281	128,852	8,428	17,023	15,978	1,045
Michigan	5,215	4,928	517	166,674	158,965	7,710	20,668	19,712	956
Minnesota	3,179	3,006	322	112,332	106,551	5,781	13,929	13,212	717
Mississippi	1,397	1,307	160	38,991	36,552	2,439	4,835	4,532	302
Missouri	3,169	2,991	315	95,270	90,250	5,020	11,813	11,191	622
Montana	568	523	78	15,158	14,010	1,149	1,880	1,737	142
Nebraska	1,077	1,018	112	33,021	31,202	1,819	4,095	3,869	226
Nevada	1,182	1,121	108	37,713	35,727	1,986	4,676	4,430	246
New Hampshire	825	770	92	29,595	27,781	1,814	3,670	3,445	225
New Jersey	4,833	4,552	469	203,451	192,901	10,550	25,228	23,920	1,308
New Mexico	952	900	94	28,344	26,857	1,487	3,515	3,330	184
New York	10,352	9,624	1,207	390,111	368,585	21,527	48,374	45,704	2,669
North Carolina	4,845	4,566	492	151,911	144,203	7,708	18,837	17,881	956
North Dakota	400	376	46	11,974	10,937	1,037	1,485	1,356	129
Ohio	5,893	5,536	590	177,596	168,589	9,007	22,022	20,905	1,117
Oklahoma	1,941	1,824	207	56,791	53,525	3,266	7,042	6,637	405
Oregon	1,991	1,864	209	64,311	60,585	3,727	7,975	7,512	462
Pennsylvania	6,890	6,529	627	235,825	224,130	11,694	29,242	27,792	1,450
Rhode Island	614	582	59	21,244	20,158	1,086	2,634	2,500	135
South Carolina	2,268	2,147	212	67,042	63,961	3,081	8,313	7,931	382
South Dakota	501	468	64	13,444	12,451	994	1,667	1,544	123
Tennessee	3,289	3,056	393	98,577	91,365	7,212	12,224	11,329	894
Texas	11,691	10,852	1,436	387,732	362,916	24,816	48,079	45,002	3,077
Utah	1,379	1,320	123	42,243	40,595	1,647	5,238	5,034	204

(Continued)

Table 4.B10—Number of workers with Social Security (OASDI) taxable earnings, amount taxable, and contributions, by state or other area and type of earnings, 2008—Continued

State or area ^a	Number ^b (thousands)			Taxable earnings ^c (millions of dollars)			OASDI contributions ^d (millions of dollars)		
	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed
Vermont	421	393	49	12,542	11,723	819	1,555	1,454	102
Virginia	4,388	4,168	402	164,442	157,184	7,258	20,391	19,491	900
Washington	3,546	3,352	340	132,612	126,020	6,592	16,444	15,626	817
West Virginia	886	836	82	25,967	24,548	1,419	3,220	3,044	176
Wisconsin	3,275	3,124	282	106,772	102,186	4,586	13,240	12,671	569
Wyoming	343	326	34	11,317	10,757	560	1,403	1,334	69
Outlying area									
Puerto Rico	1,199	1,105	111	24,853	22,957	1,897	3,082	2,847	235
Other and unknown ^e	3,062	3,055	9	68,473	68,332	141	8,491	8,473	17

SOURCE: Social Security Administration, Continuous Work History Sample, 1 percent sample.

NOTE: Data are based on preliminary estimates.

- Most state assignments are based on end-of-year residence obtained from electronically filed employer wage reports; the remainder are based on location of employer from reports filed on paper.
- Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total. National and state totals and subtotals are unduplicated counts of workers in each type of employment.
- Includes Social Security taxable wages as reported by employers and Social Security taxable self-employment income as reported by self-employed individuals. Annual maximum taxable earnings for Social Security (OASDI) from a single employer or from self-employment were \$102,000 in 2008. Totals do not necessarily equal the sum of rounded components.
- For 2008 earnings, paid at the rate of 6.2 percent of taxable wages by both employees and employers, 6.2 percent of taxable tips by employees, and 12.4 percent of self-employment income by self-employed workers. Data are unadjusted for multi-employer tax refunds. Totals do not necessarily equal the sum of rounded components.
- Persons employed in American Samoa, Guam, Northern Mariana Islands, and U.S. Virgin Islands; U.S. citizens employed abroad by U.S. employers; persons employed on U.S. oceanborne vessels; and workers with unknown residence.

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4.B OASDI: Covered Workers

Table 4.B11—Number of workers with Social Security (OASDI) taxable earnings, amount taxable, and contributions, by type of earnings, selected years 1937–2009

Year	Number ^a (thousands)			Taxable earnings ^b (millions of dollars)			OASDI contributions ^{c,d} (millions of dollars)		
	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed
1937	32,900	32,900	...	29,620	29,620	...	592	592	...
1940	35,390	35,390	...	32,970	32,970	...	659	659	...
1945	46,390	46,390	...	62,950	62,950	...	1,259	1,259	...
1950	48,280	48,280	...	87,500	87,500	...	2,625	2,625	...
1951	58,120	54,630	4,190	120,770	111,250	9,520	3,552	3,338	214
1952	59,580	56,060	4,240	128,640	118,880	9,760	3,786	3,566	220
1953	60,840	57,220	4,340	135,870	125,840	10,030	4,001	3,775	226
1954	59,610	55,940	4,350	133,520	123,410	10,110	5,240	4,936	303
1955	65,200	59,560	6,810	157,540	141,810	15,730	6,144	5,672	472
1956	67,610	61,560	7,390	170,720	153,010	17,710	6,652	6,120	531
1957	70,590	64,730	7,150	181,380	163,990	17,390	7,966	7,380	587
1958	69,770	64,040	7,130	180,720	163,140	17,580	7,935	7,341	593
1959	71,700	66,000	7,060	202,310	183,620	18,690	9,882	9,181	701
1960	72,530	66,980	6,870	207,000	188,580	18,420	12,144	11,315	829
1961	72,820	67,360	6,790	209,640	190,850	18,790	12,297	11,451	846
1962	74,280	68,890	6,720	219,050	200,130	18,920	13,397	12,508	889
1963	75,540	70,310	6,590	225,550	206,840	18,710	16,006	14,996	1,010
1964	77,430	72,230	6,480	236,390	217,430	18,960	16,788	15,764	1,024
1965	80,680	75,430	6,550	250,730	230,830	19,900	17,810	16,735	1,075
1966	84,600	79,460	6,630	312,540	287,860	24,680	23,597	22,165	1,431
1967	87,040	82,020	6,470	329,960	305,670	24,290	25,275	23,842	1,433
1968	89,380	84,470	6,570	375,800	348,500	27,300	28,069	26,486	1,583
1969	92,060	87,200	6,350	402,510	375,010	27,500	33,233	31,501	1,733
1970	93,090	88,180	6,270	415,580	388,680	26,900	34,344	32,649	1,695
1971	93,340	88,460	6,290	426,950	399,550	27,400	38,649	36,759	1,891
1972	96,240	91,220	6,600	484,150	452,050	32,100	43,804	41,589	2,215
1973	99,830	94,610	7,100	561,850	523,450	38,400	53,463	50,775	2,688
1974	101,330	96,190	7,040	636,800	594,400	42,400	61,814	58,846	2,968
1975	100,200	94,900	7,000	664,700	621,100	43,600	64,541	61,489	3,052
1976	102,600	97,230	7,400	737,700	689,200	48,500	71,626	68,231	3,395
1977	105,800	100,450	7,480	816,600	763,600	53,000	79,306	75,596	3,710
1978	110,600	104,810	8,040	915,600	856,100	59,500	90,691	86,466	4,225
1979	112,700	106,900	8,200	1,067,000	997,500	69,500	106,246	101,346	4,900
1980	113,000	107,200	8,200	1,180,700	1,109,000	71,700	117,729	112,674	5,055
1981	113,000	107,300	8,250	1,294,100	1,220,000	74,100	136,468	130,540	5,928
1982	111,800	105,800	8,550	1,365,300	1,290,000	75,300	145,382	139,320	6,062
1983	112,100	105,900	9,200	1,454,100	1,369,000	85,100	154,703	147,852	6,851
1984	116,300	109,900	9,900	1,608,800	1,515,000	93,800	183,403	172,710	10,693
1985	119,800	113,400	10,600	1,722,600	1,621,000	101,600	196,376	184,794	11,582
1986	122,900	115,900	11,200	1,844,400	1,730,800	113,600	210,262	197,311	12,950
1987	125,600	118,200	12,000	1,960,000	1,835,100	124,900	223,440	209,201	14,239
1988	129,600	122,100	12,400	2,088,400	1,952,000	136,400	253,114	236,582	16,532
1989	131,700	123,900	12,900	2,239,500	2,096,000	143,500	271,427	254,035	17,392
1990	133,600	126,100	12,500	2,358,000	2,222,000	136,000	292,392	275,528	16,864
1991	133,000	125,200	12,800	2,422,500	2,283,000	139,500	300,390	283,092	17,298
1992	134,000	126,000	13,100	2,532,900	2,386,000	146,900	314,080	295,864	18,216
1993	136,100	128,100	13,200	2,636,100	2,483,400	152,700	326,876	307,942	18,935
1994	138,200	130,100	13,300	2,785,200	2,624,500	160,700	345,365	325,438	19,927

(Continued)

Table 4.B11—Number of workers with Social Security (OASDI) taxable earnings, amount taxable, and contributions, by type of earnings, selected years 1937–2009—Continued

Year	Number ^a (thousands)			Taxable earnings ^b (millions of dollars)			OASDI contributions ^{c,d} (millions of dollars)		
	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed
1995	141,000	132,800	13,500	2,919,100	2,754,300	164,800	361,968	341,533	20,435
1996	143,400	135,100	13,900	3,073,500	2,901,700	171,800	381,114	359,811	21,303
1997	146,145	137,765	14,020	3,285,000	3,104,300	180,700	407,340	384,933	22,407
1998	148,786	140,386	14,230	3,524,900	3,333,700	191,200	437,088	413,379	23,709
1999	151,333	142,703	14,500	3,749,600	3,547,300	202,300	464,950	439,865	25,085
2000	154,732	146,097	14,675	4,008,500	3,798,400	210,100	497,054	471,002	26,052
2001	155,416	146,596	14,930	4,167,900	3,950,100	217,800	516,820	489,812	27,007
2002	154,893	145,793	15,249	4,250,100	4,021,800	228,300	527,012	498,703	28,309
2003	154,576	145,101	15,969	4,355,000	4,114,000	241,000	540,020	510,136	29,884
2004	156,405	146,662	16,496	4,554,500	4,295,900	258,600	564,758	532,692	32,066
2005	158,511	148,530	17,098	4,766,000	4,490,500	275,500	590,984	556,822	34,162
2006 ^e	160,944	150,774	17,603	5,042,200	4,751,000	291,200	625,233	589,124	36,109
2007 ^e	163,057	152,622	18,262	5,263,100	4,966,700	296,400	652,624	615,871	36,754
2008 ^f	162,485	152,388	17,219	5,434,139	5,133,800	300,339	673,833	636,591	37,242
2009 ^g	156,021	146,173	16,558	5,288,473	4,997,476	290,997	655,771	619,687	36,084

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample; Bureau of Economic Analysis; Bureau of Labor Statistics.

NOTE: . . . = not applicable.

- a. Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total.
- b. Includes Social Security taxable wages as reported by employers and Social Security taxable self-employment income as reported by self-employed individuals. See Table 2.A3 for annual maximum taxable earnings.
- c. See Table 2.A3 for contribution rates.
- d. Data are unadjusted for multi-employer tax refunds. Unadjusted for tax credits. See Table 2.A5 for information on tax credits.
- e. Preliminary data.
- f. Taxable earnings are preliminary estimates based on Social Security data; employment data are preliminary estimates based on data from Bureau of Labor Statistics and the National Income and Product Accounts.
- g. Preliminary estimates based on data from Bureau of Labor Statistics and Bureau of Economic Analysis.

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4.B HI: Covered Workers

Table 4.B12—Number of workers with Medicare Part A (HI) taxable earnings, amount taxable, and contributions, by state or other area and type of earnings, 2008

State or area ^a	Number ^b (thousands)			Taxable earnings ^c (millions of dollars)			HI contributions ^d (millions of dollars)		
	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed
All areas	166,338	156,392	18,033	6,734,851	6,248,700	486,151	195,311	181,212	14,098
Alabama	2,382	2,241	258	80,214	75,320	4,894	2,326	2,184	142
Alaska	418	398	45	16,693	15,603	1,090	484	452	32
Arizona	2,992	2,842	291	113,191	106,954	6,237	3,283	3,102	181
Arkansas	1,486	1,394	160	45,564	42,608	2,957	1,321	1,236	86
California	18,074	16,649	2,358	847,966	775,540	72,427	24,591	22,491	2,100
Colorado	2,709	2,536	325	111,282	103,246	8,036	3,227	2,994	233
Connecticut	2,057	1,926	238	120,937	109,095	11,842	3,507	3,164	343
Delaware	530	510	38	20,907	19,927	979	606	578	28
District of Columbia	404	386	36	22,865	20,564	2,301	663	596	67
Florida	9,249	8,628	1,111	331,831	311,844	19,987	9,623	9,043	580
Georgia	4,856	4,559	551	183,910	173,125	10,785	5,333	5,021	313
Hawaii	751	707	78	28,251	26,499	1,752	819	768	51
Idaho	782	734	86	24,746	23,250	1,496	718	674	43
Illinois	6,916	6,521	748	306,717	282,218	24,499	8,895	8,184	710
Indiana	3,710	3,545	329	125,112	118,230	6,882	3,628	3,429	200
Iowa	1,775	1,663	208	58,255	54,616	3,639	1,689	1,584	106
Kansas	1,607	1,519	173	57,980	54,020	3,960	1,681	1,567	115
Kentucky	2,255	2,129	234	71,494	67,235	4,259	2,073	1,950	124
Louisiana	2,362	2,229	252	83,514	78,147	5,367	2,422	2,266	156
Maine	803	749	94	25,911	24,214	1,697	751	702	49
Maryland	3,285	3,118	325	161,698	152,123	9,575	4,689	4,412	278
Massachusetts	3,791	3,568	414	189,869	176,210	13,659	5,506	5,110	396
Michigan	5,230	4,942	541	192,760	180,737	12,023	5,590	5,241	349
Minnesota	3,188	3,015	339	130,011	122,551	7,460	3,770	3,554	216
Mississippi	1,401	1,312	164	42,538	39,597	2,942	1,234	1,148	85
Missouri	3,241	3,065	327	112,448	105,807	6,641	3,261	3,068	193
Montana	569	524	80	16,741	15,411	1,330	485	447	39
Nebraska	1,081	1,021	117	37,795	35,114	2,682	1,096	1,018	78
Nevada	1,275	1,217	112	49,343	45,492	3,851	1,431	1,319	112
New Hampshire	835	780	96	35,232	33,008	2,223	1,022	957	64
New Jersey	4,854	4,571	507	272,594	252,155	20,439	7,905	7,313	593
New Mexico	959	908	97	32,160	29,297	2,863	933	850	83
New York	10,359	9,627	1,276	550,027	488,228	61,799	15,951	14,159	1,792
North Carolina	4,850	4,569	514	173,275	162,124	11,151	5,025	4,702	323
North Dakota	401	377	48	13,344	12,076	1,268	387	350	37
Ohio	6,397	6,075	613	230,655	218,171	12,484	6,689	6,327	362
Oklahoma	1,953	1,835	215	63,388	59,384	4,004	1,838	1,722	116
Oregon	1,995	1,867	216	71,811	67,204	4,606	2,083	1,949	134
Pennsylvania	6,914	6,551	662	277,745	260,452	17,293	8,055	7,553	501
Rhode Island	623	590	62	24,542	22,942	1,599	712	665	46
South Carolina	2,268	2,146	220	73,697	69,714	3,983	2,137	2,022	116
South Dakota	502	470	66	15,085	13,969	1,116	437	405	32
Tennessee	3,303	3,070	407	118,362	105,702	12,660	3,433	3,065	367
Texas	12,322	11,512	1,496	496,203	458,765	37,439	14,390	13,304	1,086
Utah	1,387	1,327	129	47,274	44,536	2,737	1,371	1,292	79

(Continued)

Table 4.B12—Number of workers with Medicare Part A (HI) taxable earnings, amount taxable, and contributions, by state or other area and type of earnings, 2008—Continued

State or area ^a	Number ^b (thousands)			Taxable earnings ^c (millions of dollars)			HI contributions ^d (millions of dollars)		
	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed
Vermont	420	392	50	13,632	12,687	945	395	368	27
Virginia	4,422	4,201	429	197,367	185,236	12,130	5,724	5,372	352
Washington	3,566	3,372	359	153,145	144,135	9,010	4,441	4,180	261
West Virginia	889	840	84	28,818	26,686	2,132	836	774	62
Wisconsin	3,280	3,128	295	118,704	113,006	5,697	3,442	3,277	165
Wyoming	344	327	35	12,938	12,039	899	375	349	26
Outlying area									
Puerto Rico	1,236	1,143	112	27,694	25,456	2,238	803	738	65
Other and unknown ^e	3,076	3,070	9	76,614	76,429	185	2,222	2,216	5

SOURCE: Social Security Administration, Continuous Work History Sample, 1 percent sample.

NOTE: Data are based on preliminary estimates.

- Most state assignments are based on end-of-year residence obtained from electronically filed employer wage reports; the remainder are based on location of employer from reports filed on paper.
- Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total. National and state totals and subtotals are unduplicated counts of workers in each type of employment.
- No annual maximum taxable earnings amount for Medicare. Totals do not necessarily equal the sum of rounded components.
- For 2008 earnings, paid at the rate of 1.45 percent of taxable wages by both employees and employers, 1.45 percent of taxable tips by employees, and 2.9 percent of self-employment income by self-employed workers. Totals do not necessarily equal the sum of rounded components.
- Persons employed in American Samoa, Guam, Northern Mariana Islands, and U.S. Virgin Islands; U.S. citizens employed abroad by U.S. employers; persons employed on U.S. oceanborne vessels; and workers with unknown residence.

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4.B OASDI: Covered Workers

Table 4.B13—Social Security (OASDI) taxable earnings, by sex and age, 2008

Sex	Total, all ages ^a	Under 20	20–29	30–39	40–49	50–59	60–61	62–64	65–69	70 or older
Social Security (OASDI) taxable earnings (in millions of dollars)										
All workers	5,434,139	46,708	747,135	1,260,322	1,526,443	1,317,115	182,914	164,425	123,776	65,301
Men	3,256,362	24,818	419,161	756,906	929,800	785,341	112,208	102,131	81,113	44,885
Women	2,177,777	21,890	327,974	503,416	596,643	531,774	70,707	62,294	42,663	20,416
Percentage distribution, by age										
All workers	100	1	14	23	28	24	3	3	2	1
Men	100	1	13	23	29	24	3	3	2	1
Women	100	1	15	23	27	24	3	3	2	1
Percentage distribution, by sex										
All workers	100	100	100	100	100	100	100	100	100	100
Men	60	53	56	60	61	60	61	62	66	69
Women	40	47	44	40	39	40	39	38	34	31

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTES: Includes Social Security taxable wages as reported by employers and Social Security taxable self-employment income as reported by self-employed individuals.

Totals do not necessarily equal the sum of rounded components.

a. Includes workers of unknown age.

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Table 4.B14—Medicare Part A (HI) taxable earnings, by sex and age, 2008

Sex	Total, all ages ^a	Under 20	20–29	30–39	40–49	50–59	60–61	62–64	65–69	70 or older
Medicare Part A (HI) taxable earnings (in millions of dollars)										
All workers	6,734,851	47,158	784,049	1,477,601	1,948,659	1,733,257	254,648	225,537	172,682	91,260
Men	4,264,008	25,044	439,616	915,194	1,254,114	1,109,914	172,842	154,445	124,136	68,702
Women	2,470,843	22,113	344,434	562,407	694,545	623,342	81,806	71,092	48,546	22,558
Percentage distribution, by age										
All workers	100	1	12	22	29	26	4	3	3	1
Men	100	1	10	21	29	26	4	4	3	2
Women	100	1	14	23	28	25	3	3	2	1
Percentage distribution, by sex										
All workers	100	100	100	100	100	100	100	100	100	100
Men	63	53	56	62	64	64	68	68	72	75
Women	37	47	44	38	36	36	32	32	28	25

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTE: Totals do not necessarily equal the sum of rounded components.

a. Includes workers of unknown age.

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4.C OASDI: Insured Workers

**Table 4.C1—Estimated number of insured workers, by insured status, December 31, 1940–2010
(in millions)**

Year	Fully insured for retirement benefits, survivor benefits, or both			Insured in event of disability
	Total	Permanently insured	Not permanently insured	
1940	24.2	1.1	23.1	...
1941	25.8	1.4	24.4	...
1942	28.1	1.8	26.3	...
1943	29.9	2.3	27.6	...
1944	31.9	2.8	29.1	...
1945	33.4	3.4	30.0	...
1946	35.4	8.6	26.8	...
1947	37.3	11.6	25.7	...
1948	38.9	13.2	25.7	...
1949	40.1	14.9	25.2	...
1950	59.8	21.0	38.8	...
1951	62.8	22.9	39.9	...
1952	68.2	25.6	42.7	...
1953	71.0	27.7	43.4	...
1954	70.2	29.9	40.4	31.9
1955	70.5	32.5	38.0	35.4
1956	74.0	36.1	38.0	37.2
1957	76.1	38.3	37.9	38.4
1958	76.5	40.3	36.2	43.4
1959	76.7	42.2	34.6	46.4
1960	84.4	47.6	36.8	48.5
1961	88.5	53.3	35.3	50.5
1962	89.8	54.9	34.8	51.5
1963	91.3	56.6	34.7	52.3
1964	92.8	58.3	34.5	53.3
1965	94.8	60.2	34.6	55.0
1966	97.2	61.9	35.3	55.7
1967	99.9	63.3	36.6	56.9
1968	102.6	64.5	38.1	70.9
1969	106.1	66.6	39.5	73.2
1970	108.8	67.8	41.0	75.3
1971	111.2	68.9	42.4	77.0
1972	113.9	70.2	43.7	78.8
1973	117.1	71.6	45.5	81.4
1974	120.6	73.1	47.5	84.3
1975	124.1	75.3	48.8	86.3
1976	126.9	77.1	49.9	87.8
1977	130.0	79.1	50.9	89.7
1978	134.2	81.3	52.9	94.1
1979	138.3	83.9	54.4	97.8
1980	141.2	86.1	55.1	100.5
1981	143.6	88.7	54.9	102.3
1982	145.5	91.5	54.0	103.7
1983	147.2	94.7	52.5	104.7
1984	149.0	97.5	51.5	106.3
1985	151.5	100.6	50.9	108.8
1986	154.0	104.0	50.0	110.9
1987	156.3	107.9	48.4	113.1
1988	159.0	111.2	47.8	115.2
1989	162.1	114.2	47.9	117.5
1990	164.4	116.7	47.7	119.4
1991	166.3	119.1	47.3	120.7
1992	168.0	121.5	46.5	121.9
1993	169.5	123.9	45.6	123.3
1994	171.2	126.2	45.0	125.0

(Continued)

**Table 4.C1—Estimated number of insured workers, by insured status, December 31, 1940–2010
(in millions)—Continued**

Year	Fully insured for retirement benefits, survivor benefits, or both			Insured in event of disability
	Total	Permanently insured	Not permanently insured	
1995	173.6	128.7	44.9	127.0
1996	175.7	131.1	44.5	129.0
1997	178.0	133.9	44.1	131.0
1998	180.4	136.4	44.0	133.3
1999	183.3	138.9	44.3	135.6
2000	185.7	140.8	44.9	137.9
2001	188.1	142.9	45.2	139.9
2002	190.2	144.9	45.3	141.2
2003	192.0	147.0	45.0	142.3
2004	193.7	149.0	44.8	143.6
2005	195.9	151.2	44.7	145.3
2006	198.2	153.3	44.9	147.0
2007	200.6	155.6	45.0	148.4
2008	202.7	157.6	45.1	150.2
2009	204.6	159.5	45.1	151.4
2010	206.5	161.4	45.0	152.4

SOURCE: Social Security Administration, Continuous Work History Sample, 1 percent sample.

NOTES: Insured workers are those who have accumulated sufficient quarters of coverage over their working lifetimes to be eligible for benefits.

Figures are subject to revision.

Totals do not necessarily equal the sum of rounded components.

. . . = not applicable.

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4.C OASDI: Insured Workers

Table 4.C2—Estimated number of insured workers, by insured status, sex, and age, December 31, 1970–2010, selected years (in thousands)

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–64	65–69	70–74	75 or older
<i>Fully insured for retirement benefits, survivor benefits, or both</i>														
<i>Total</i>														
1970	108,831	4,097	14,816	12,796	10,196	9,252	9,715	10,072	9,280	8,045	6,782	5,280	3,798	4,703
1975	124,103	5,286	16,916	16,906	12,805	10,201	9,269	9,663	9,786	8,786	7,582	6,291	4,577	6,034
1980	141,198	6,505	19,163	19,266	17,074	12,893	10,306	9,247	9,492	9,375	8,295	7,006	5,341	7,235
1985	151,506	4,245	17,758	20,785	19,309	17,041	12,898	10,297	9,111	9,130	8,836	7,465	6,005	8,626
1990	164,424	4,761	16,473	20,503	21,124	19,339	17,092	12,848	10,162	8,862	8,678	8,077	6,452	10,053
1995	173,575	3,960	14,904	18,545	20,897	21,305	19,359	16,996	12,673	9,880	8,589	7,977	7,057	11,434
1996	175,662	4,204	14,630	18,560	20,397	21,481	19,861	17,521	13,438	10,277	8,553	7,943	7,032	11,764
1997	177,980	4,355	14,694	18,442	19,873	21,564	20,366	17,750	14,371	10,825	8,791	7,861	7,059	12,028
1998	180,435	4,618	14,991	18,190	19,418	21,638	20,726	18,221	15,067	11,445	8,957	7,801	7,064	12,297
1999	183,251	4,835	15,415	17,846	19,165	21,532	21,086	18,730	15,869	11,945	9,406	7,861	7,004	12,558
2000	185,699	4,902	15,916	17,430	19,187	21,219	21,398	19,258	16,754	12,364	9,580	7,892	7,014	12,784
2001	188,073	4,809	16,357	17,164	19,240	20,772	21,615	19,790	17,268	13,096	9,970	7,999	6,996	12,996
2002	190,241	4,423	16,630	17,274	19,207	20,325	21,822	20,333	17,460	13,973	10,457	8,155	6,970	13,212
2003	192,000	3,984	16,638	17,496	18,931	19,867	21,876	20,731	17,932	14,649	11,081	8,454	6,929	13,432
2004	193,727	3,710	16,549	17,844	18,552	19,590	21,773	21,094	18,458	15,420	11,456	8,677	6,989	13,614
2005	195,915	3,617	16,466	18,277	18,106	19,575	21,443	21,422	19,009	16,269	11,922	8,945	7,049	13,816
2006	198,158	3,647	16,433	18,681	17,786	19,608	20,971	21,634	19,556	16,773	12,616	9,297	7,135	14,020
2007	200,594	3,648	16,475	19,032	17,768	19,484	20,459	21,736	20,078	17,034	13,522	9,832	7,295	14,231
2008	202,709	3,622	16,361	19,292	18,002	19,238	20,026	21,808	20,484	17,502	14,115	10,336	7,563	14,359
2009	204,581	3,460	16,283	19,396	18,363	18,894	19,757	21,738	20,829	18,042	14,728	10,714	7,784	14,593
2010	206,453	3,218	16,213	19,418	18,820	18,474	19,747	21,435	21,151	18,583	15,547	11,061	8,025	14,761
<i>Male</i>														
1970	63,264	2,697	8,476	7,161	5,886	5,453	5,703	5,801	5,375	4,787	3,977	3,033	2,172	2,741
1975	69,527	3,199	9,369	9,127	7,198	5,881	5,392	5,585	5,582	5,031	4,309	3,422	2,413	3,018
1980	76,866	3,667	10,229	10,203	9,231	7,182	5,831	5,278	5,403	5,298	4,622	3,758	2,752	3,413
1985	80,975	2,291	9,420	10,885	10,248	9,204	7,102	5,738	5,126	5,136	4,882	3,966	3,066	3,911
1990	86,693	2,542	8,668	10,750	11,073	10,203	9,117	6,971	5,592	4,931	4,780	4,294	3,296	4,477
1995	90,567	2,064	7,730	9,661	10,963	11,157	10,140	8,970	6,801	5,382	4,713	4,270	3,633	5,085
1996	91,439	2,164	7,569	9,641	10,693	11,235	10,392	9,201	7,182	5,567	4,670	4,254	3,623	5,248
1997	92,474	2,242	7,574	9,544	10,397	11,267	10,643	9,282	7,643	5,842	4,784	4,229	3,646	5,380
1998	93,523	2,374	7,694	9,389	10,131	11,300	10,816	9,501	7,966	6,145	4,861	4,189	3,650	5,507
1999	94,758	2,490	7,870	9,180	9,972	11,239	10,988	9,745	8,345	6,388	5,069	4,210	3,629	5,634
2000	95,969	2,520	8,152	8,960	10,022	11,084	11,139	10,004	8,773	6,588	5,130	4,203	3,646	5,748
2001	96,998	2,463	8,377	8,795	10,016	10,851	11,236	10,267	8,996	6,947	5,311	4,241	3,638	5,859
2002	97,943	2,252	8,515	8,844	9,962	10,608	11,325	10,535	9,062	7,373	5,562	4,308	3,622	5,977
2003	98,644	2,021	8,494	8,941	9,798	10,365	11,345	10,731	9,280	7,683	5,853	4,442	3,596	6,096
2004	99,381	1,861	8,459	9,108	9,578	10,217	11,290	10,911	9,536	8,045	6,020	4,537	3,621	6,200
2005	100,350	1,801	8,417	9,320	9,314	10,196	11,133	11,073	9,805	8,453	6,222	4,657	3,641	6,319
2006	101,353	1,811	8,380	9,533	9,118	10,188	10,895	11,174	10,083	8,675	6,555	4,826	3,689	6,427
2007	102,424	1,806	8,378	9,716	9,092	10,089	10,631	11,215	10,343	8,774	6,994	5,080	3,767	6,539
2008	103,354	1,794	8,311	9,840	9,195	9,939	10,403	11,248	10,540	8,990	7,265	5,312	3,896	6,619
2009	104,205	1,711	8,253	9,888	9,365	9,738	10,254	11,206	10,702	9,249	7,591	5,507	3,996	6,745
2010	105,028	1,588	8,199	9,896	9,591	9,497	10,228	11,052	10,852	9,511	7,992	5,669	4,108	6,845
<i>Female</i>														
1970	45,568	1,399	6,340	5,636	4,310	3,799	4,012	4,270	3,904	3,257	2,805	2,248	1,626	1,961
1975	54,575	2,087	7,547	7,779	5,607	4,320	3,877	4,078	4,204	3,755	3,272	2,869	2,163	3,016
1980	64,331	2,838	8,934	9,063	7,843	5,711	4,475	3,968	4,089	4,077	3,673	3,248	2,589	3,822
1985	70,530	1,954	8,338	9,900	9,061	7,837	5,796	4,560	3,985	3,993	3,954	3,499	2,939	4,714
1990	77,731	2,219	7,805	9,754	10,051	9,136	7,975	5,877	4,570	3,931	3,898	3,783	3,155	5,576
1995	83,008	1,896	7,174	8,884	9,934	10,148	9,219	8,026	5,872	4,499	3,876	3,708	3,425	6,349
1996	84,223	2,041	7,061	8,919	9,704	10,246	9,469	8,319	6,256	4,710	3,883	3,689	3,409	6,516
1997	85,506	2,114	7,120	8,899	9,476	10,297	9,723	8,468	6,729	4,982	4,006	3,632	3,413	6,648
1998	86,912	2,244	7,297	8,802	9,287	10,339	9,909	8,720	7,101	5,301	4,097	3,612	3,413	6,790
1999	88,494	2,345	7,545	8,665	9,193	10,293	10,098	8,985	7,525	5,557	4,337	3,652	3,375	6,925

(Continued)

Table 4.C2—Estimated number of insured workers, by insured status, sex, and age, December 31, 1970–2010, selected years (in thousands)—Continued

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–64	65–69	70–74	75 or older
<i>Fully insured for retirement benefits, survivor benefits, or both (cont.)</i>														
<i>Female (cont.)</i>														
2000	89,730	2,382	7,764	8,470	9,165	10,135	10,259	9,255	7,981	5,776	4,451	3,689	3,368	7,036
2001	91,075	2,346	7,980	8,369	9,224	9,921	10,379	9,523	8,271	6,150	4,659	3,758	3,358	7,137
2002	92,298	2,171	8,115	8,430	9,245	9,717	10,497	9,798	8,399	6,600	4,896	3,847	3,348	7,235
2003	93,356	1,963	8,144	8,555	9,133	9,503	10,531	9,999	8,652	6,966	5,228	4,012	3,333	7,337
2004	94,346	1,849	8,089	8,736	8,974	9,373	10,483	10,183	8,922	7,375	5,436	4,140	3,369	7,415
2005	95,565	1,816	8,049	8,957	8,792	9,379	10,309	10,349	9,204	7,816	5,700	4,288	3,408	7,497
2006	96,806	1,837	8,053	9,148	8,669	9,420	10,076	10,460	9,473	8,098	6,062	4,471	3,446	7,593
2007	98,170	1,842	8,096	9,316	8,676	9,395	9,828	10,521	9,735	8,260	6,528	4,753	3,529	7,692
2008	99,355	1,829	8,050	9,453	8,807	9,299	9,622	10,560	9,944	8,512	6,850	5,024	3,667	7,740
2009	100,377	1,749	8,030	9,508	8,998	9,157	9,503	10,532	10,127	8,793	7,136	5,208	3,788	7,848
2010	101,425	1,630	8,014	9,523	9,229	8,977	9,519	10,384	10,300	9,071	7,554	5,391	3,917	7,916
<i>Insured in event of disability^a</i>														
<i>Total</i>														
1970	75,342	3,954	12,787	10,054	7,369	6,832	7,445	7,829	7,190	6,500	5,383	...	...	...
1975	86,286	5,056	14,580	13,509	9,445	7,693	7,341	7,784	7,872	6,978	6,029	...	...	...
1980	100,458	6,348	17,534	16,288	13,106	9,807	8,260	7,579	7,732	7,500	6,303	...	...	...
1985	108,764	4,093	15,972	18,088	15,903	13,653	10,581	8,640	7,604	7,422	6,809	...	...	...
1990	119,391	4,576	15,177	18,154	17,830	16,089	14,158	10,834	8,570	7,310	6,694	...	...	...
1995	126,975	3,789	13,484	16,537	18,116	18,245	16,575	14,480	10,813	8,274	6,662	...	...	...
1996	128,983	4,046	13,317	16,562	17,710	18,441	17,068	14,965	11,516	8,592	6,768	...	...	...
1997	131,039	4,206	13,527	16,439	17,271	18,586	17,503	15,175	12,313	9,135	6,887	...	...	...
1998	133,258	4,469	13,829	16,280	16,896	18,638	17,885	15,597	12,892	9,677	7,096	...	...	...
1999	135,626	4,692	14,214	16,028	16,710	18,638	18,210	16,143	13,595	10,087	7,311	...	...	...
2000	137,925	4,760	14,699	15,640	16,772	18,426	18,554	16,727	14,368	10,419	7,560	...	...	...
2001	139,891	4,657	15,007	15,385	16,866	18,103	18,790	17,255	14,865	11,101	7,863	...	...	...
2002	141,159	4,225	14,987	15,449	16,754	17,698	18,954	17,710	15,101	11,896	8,385	...	...	...
2003	142,266	3,772	14,800	15,585	16,548	17,332	19,003	18,100	15,507	12,495	8,898	228	...	...
2004	143,637	3,515	14,647	15,813	16,238	17,111	18,940	18,383	16,033	13,180	9,300	478	...	...
2005	145,281	3,441	14,644	16,168	15,787	17,136	18,640	18,645	16,582	13,880	9,589	769	...	...
2006	146,970	3,500	14,780	16,515	15,436	17,138	18,219	18,774	17,032	14,313	10,204	1,060	...	...
2007	148,438	3,516	14,861	16,788	15,451	16,918	17,697	18,824	17,417	14,509	10,948	1,508	...	...
2008	150,221	3,485	14,780	17,102	15,756	16,786	17,346	18,902	17,773	14,962	11,447	1,882	...	...
2009	151,359	3,322	14,685	17,219	16,161	16,556	17,199	18,899	18,048	15,467	11,996	1,808	...	...
2010	152,352	3,083	14,605	17,269	16,638	16,241	17,222	18,684	18,330	15,873	12,609	1,798	...	...
<i>Male</i>														
1970	50,157	2,602	7,757	6,590	5,380	5,003	5,236	5,248	4,682	4,200	3,457	...	...	...
1975	54,763	3,063	8,450	8,276	6,459	5,368	4,949	5,073	4,992	4,351	3,783	...	...	...
1980	60,289	3,584	9,661	9,281	8,107	6,372	5,258	4,737	4,794	4,617	3,880	...	...	...
1985	62,614	2,234	8,702	9,988	9,161	8,080	6,292	5,093	4,500	4,445	4,120	...	...	...
1990	66,630	2,452	8,185	9,842	9,945	9,122	7,955	6,104	4,862	4,217	3,946	...	...	...
1995	69,386	1,974	7,164	8,903	9,964	10,132	9,105	7,825	5,913	4,610	3,798	...	...	...
1996	70,188	2,089	7,025	8,872	9,726	10,214	9,367	8,048	6,266	4,730	3,853	...	...	...
1997	71,024	2,169	7,077	8,771	9,476	10,244	9,597	8,126	6,661	5,007	3,898	...	...	...
1998	71,942	2,306	7,189	8,614	9,241	10,273	9,767	8,338	6,932	5,298	3,983	...	...	...
1999	72,936	2,425	7,352	8,431	9,089	10,244	9,925	8,624	7,262	5,493	4,092	...	...	...

(Continued)

4.C OASDI: Insured Workers

Table 4.C2—Estimated number of insured workers, by insured status, sex, and age, December 31, 1970–2010, selected years (in thousands)—Continued

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–64	65–69	70–74	75 or older
<i>Insured in event of disability^a (cont.)</i>														
<i>Male (cont.)</i>														
2000	73,897	2,442	7,588	8,182	9,079	10,093	10,093	8,954	7,620	5,653	4,194	...	...	...
2001	74,698	2,380	7,725	8,022	9,072	9,906	10,190	9,230	7,853	5,993	4,327	...	...	...
2002	75,152	2,146	7,719	8,012	8,982	9,659	10,248	9,470	7,946	6,378	4,592	...	...	...
2003	75,547	1,906	7,609	8,055	8,812	9,447	10,277	9,642	8,148	6,663	4,864	122	...	...
2004	76,132	1,754	7,544	8,165	8,619	9,298	10,248	9,784	8,412	6,984	5,060	265	...	...
2005	76,866	1,702	7,531	8,339	8,353	9,291	10,082	9,921	8,719	7,305	5,196	427	...	...
2006	77,607	1,732	7,569	8,503	8,160	9,254	9,867	9,980	8,958	7,502	5,500	583	...	...
2007	78,241	1,735	7,620	8,640	8,109	9,134	9,586	10,002	9,159	7,572	5,863	822	...	...
2008	78,822	1,720	7,588	8,780	8,247	9,020	9,327	9,983	9,283	7,775	6,087	1,011	...	...
2009	79,212	1,637	7,497	8,813	8,443	8,863	9,225	9,972	9,384	8,020	6,380	977	...	...
2010	79,492	1,515	7,409	8,832	8,683	8,658	9,213	9,868	9,515	8,196	6,643	958	...	...
<i>Female</i>														
1970	25,185	1,352	5,030	3,464	1,989	1,829	2,209	2,581	2,508	2,299	1,925	...	...	...
1975	31,523	1,994	6,130	5,233	2,986	2,325	2,393	2,711	2,880	2,627	2,245	...	...	...
1980	40,169	2,764	7,874	7,007	4,999	3,436	3,002	2,843	2,938	2,883	2,423	...	...	...
1985	46,150	1,859	7,271	8,099	6,742	5,573	4,290	3,548	3,103	2,977	2,689	...	...	...
1990	52,761	2,123	6,992	8,312	7,885	6,967	6,203	4,730	3,709	3,094	2,748	...	...	...
1995	57,588	1,815	6,321	7,634	8,152	8,114	7,470	6,655	4,901	3,664	2,864	...	...	...
1996	58,795	1,957	6,292	7,690	7,984	8,227	7,701	6,917	5,250	3,862	2,914	...	...	...
1997	60,014	2,037	6,450	7,668	7,794	8,342	7,906	7,049	5,652	4,128	2,989	...	...	...
1998	61,317	2,163	6,641	7,666	7,655	8,365	8,118	7,259	5,960	4,379	3,113	...	...	...
1999	62,690	2,267	6,862	7,596	7,621	8,394	8,285	7,519	6,333	4,594	3,220	...	...	...
2000	64,028	2,318	7,112	7,458	7,693	8,333	8,461	7,773	6,748	4,766	3,367	...	...	...
2001	65,193	2,277	7,282	7,363	7,794	8,197	8,600	8,025	7,013	5,108	3,536	...	...	...
2002	66,008	2,079	7,268	7,437	7,772	8,039	8,706	8,240	7,155	5,518	3,793	...	...	...
2003	66,719	1,866	7,190	7,530	7,736	7,884	8,725	8,457	7,359	5,832	4,033	105	...	...
2004	67,506	1,761	7,103	7,648	7,620	7,813	8,692	8,599	7,621	6,196	4,241	213	...	...
2005	68,415	1,739	7,113	7,829	7,434	7,845	8,558	8,724	7,863	6,575	4,393	342	...	...
2006	69,363	1,768	7,212	8,013	7,277	7,884	8,352	8,794	8,073	6,810	4,704	477	...	...
2007	70,196	1,781	7,242	8,148	7,342	7,785	8,111	8,822	8,258	6,937	5,085	686	...	...
2008	71,398	1,765	7,192	8,322	7,509	7,766	8,019	8,919	8,490	7,187	5,359	871	...	...
2009	72,147	1,685	7,188	8,406	7,719	7,693	7,974	8,926	8,664	7,447	5,615	831	...	...
2010	72,860	1,567	7,196	8,437	7,955	7,583	8,009	8,816	8,814	7,677	5,965	840	...	...

SOURCE: Social Security Administration, Continuous Work History Sample, 1 percent sample.

NOTES: Insured workers are those who have accumulated sufficient quarters of coverage over their working lifetimes to be eligible for benefits.

Figures are subject to revision.

Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Figures exclude people at or above normal (or full) retirement age because they are not eligible to receive disability benefits.

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Table 4.C5—Estimated size of the population in the Social Security area and percentage fully insured, by sex and age, 2006–2010 (in thousands)

Age at end of year	2006		2007		2008		2009		2010	
	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured
Total										
Total	305,953	^a 88	308,904	^a 88	311,881	^a 88	314,817	^a 88	317,717	^a 88
Under 15	63,212	^b	63,423	^b	63,625	^b	63,901	^b	64,242	^b
15–19	21,711	17	21,932	17	22,085	16	22,069	16	21,924	15
20–24	21,055	78	21,151	78	21,418	76	21,787	75	22,171	73
25–29	20,799	90	21,186	90	21,449	90	21,611	90	21,757	89
30–34	19,873	89	19,956	89	20,196	89	20,549	89	20,973	90
35–39	21,574	91	21,525	91	21,316	90	20,995	90	20,589	90
40–44	22,676	92	22,207	92	21,812	92	21,600	91	21,657	91
45–49	23,281	93	23,360	93	23,419	93	23,352	93	23,061	93
50–54	21,202	92	21,727	92	22,152	92	22,495	93	22,806	93
55–59	18,468	91	18,687	91	19,135	91	19,661	92	20,193	92
60–64	14,219	89	15,079	90	15,743	90	16,486	89	17,315	90
65–69	10,956	85	11,481	86	12,003	86	12,424	86	12,755	87
70–74	8,779	81	8,926	82	9,149	83	9,387	83	9,640	83
75 or older	18,147	77	18,265	78	18,378	78	18,499	79	18,634	79
Male										
Subtotal	151,861	^a 92	153,428	^a 92	154,935	^a 91	156,417	^a 91	157,886	^a 91
Under 15	32,302	^b	32,413	^b	32,517	^b	32,660	^b	32,838	^b
15–19	11,118	16	11,222	16	11,289	16	11,273	15	11,192	14
20–24	10,853	77	10,888	77	11,004	76	11,170	74	11,345	72
25–29	10,728	89	10,938	89	11,067	89	11,141	89	11,201	88
30–34	10,159	90	10,222	89	10,349	89	10,531	89	10,750	89
35–39	10,973	93	10,956	92	10,847	92	10,684	91	10,480	91
40–44	11,461	95	11,241	95	11,049	94	10,945	94	10,976	93
45–49	11,650	96	11,698	96	11,741	96	11,722	96	11,589	95
50–54	10,507	96	10,777	96	10,988	96	11,161	96	11,324	96
55–59	9,058	96	9,165	96	9,385	96	9,647	96	9,912	96
60–64	6,870	95	7,297	96	7,622	95	7,987	95	8,394	95
65–69	5,180	93	5,436	93	5,691	93	5,896	93	6,056	94
70–74	4,011	92	4,093	92	4,208	93	4,328	92	4,453	92
75 or older	6,991	92	7,084	92	7,176	92	7,271	93	7,376	93
Female										
Subtotal	154,093	^a 84	155,476	^a 85	156,946	^a 85	158,399	^a 85	159,832	^a 85
Under 15	30,910	^b	31,009	^b	31,108	^b	31,241	^b	31,404	^b
15–19	10,593	17	10,711	17	10,796	17	10,796	16	10,732	15
20–24	10,203	79	10,263	79	10,414	77	10,617	76	10,826	74
25–29	10,071	91	10,248	91	10,382	91	10,470	91	10,556	90
30–34	9,714	89	9,734	89	9,847	89	10,019	90	10,223	90
35–39	10,601	89	10,569	89	10,469	89	10,311	89	10,109	89
40–44	11,215	90	10,966	90	10,763	89	10,654	89	10,681	89
45–49	11,632	90	11,662	90	11,678	90	11,629	91	11,472	91
50–54	10,695	89	10,950	89	11,163	89	11,334	89	11,482	90
55–59	9,410	86	9,523	87	9,750	87	10,014	88	10,281	88
60–64	7,349	82	7,782	84	8,121	84	8,499	84	8,921	85
65–69	5,776	77	6,045	79	6,312	80	6,528	80	6,699	80
70–74	4,768	72	4,832	73	4,941	74	5,059	75	5,187	76
75 or older	11,156	68	11,181	69	11,203	69	11,228	70	11,259	70

SOURCE: Census Bureau.

NOTES: Population in the Social Security area includes residents of the 50 states and the District of Columbia adjusted for net census undercount; civilian residents of American Samoa, Guam, Northern Mariana Islands, Puerto Rico, and U.S. Virgin Islands; federal civilian employees and persons in the armed forces abroad and their dependents; crew members of merchant vessels; and all other U.S. citizens abroad.

Totals do not necessarily equal the sum of rounded components.

Population estimates are subject to revision.

a. Percentage of population aged 20 or older and fully insured.

b. Less than 0.5 percent.

CONTACT: Felicitie Bell (410) 965-3020, Michael Morris (410) 965-3045, or supplement@ssa.gov.

4.C OASDI: Insured Workers

Table 4.C6—Period life table, 2006

Exact age	Male			Female			Exact age	Male			Female		
	Death probability ^a	Number of lives ^b	Life expectancy	Death probability ^a	Number of lives ^b	Life expectancy		Death probability ^a	Number of lives ^b	Life expectancy	Death probability ^a	Number of lives ^b	Life expectancy
0	.007349	100,000	75.10	.006055	100,000	80.21	60	.011599	85,026	20.70	.007219	91,109	23.78
1	.000465	99,265	74.66	.000433	99,395	79.70	61	.012624	84,039	19.94	.007956	90,452	22.95
2	.000321	99,219	73.69	.000276	99,351	78.73	62	.013684	82,978	19.19	.008698	89,732	22.13
3	.000244	99,187	72.72	.000184	99,324	77.75	63	.014759	81,843	18.45	.009424	88,951	21.32
4	.000194	99,163	71.74	.000160	99,306	76.77	64	.015890	80,635	17.72	.010174	88,113	20.52
5	.000181	99,144	70.75	.000144	99,290	75.78	65	.017161	79,354	17.00	.011009	87,217	19.72
6	.000174	99,126	69.76	.000133	99,276	74.79	66	.018610	77,992	16.28	.011986	86,257	18.94
7	.000163	99,108	68.77	.000124	99,262	73.80	67	.020216	76,540	15.58	.013117	85,223	18.16
8	.000142	99,092	67.79	.000113	99,250	72.81	68	.021992	74,993	14.89	.014430	84,105	17.40
9	.000112	99,078	66.79	.000102	99,239	71.82	69	.023966	73,344	14.22	.015924	82,891	16.64
10	.000085	99,067	65.80	.000093	99,229	70.82	70	.026212	71,586	13.55	.017646	81,571	15.90
11	.000085	99,059	64.81	.000094	99,220	69.83	71	.028725	69,710	12.91	.019544	80,132	15.18
12	.000135	99,050	63.81	.000113	99,210	68.84	72	.031450	67,707	12.27	.021523	78,566	14.47
13	.000251	99,037	62.82	.000153	99,199	67.85	73	.034385	65,578	11.65	.023551	76,875	13.78
14	.000416	99,012	61.84	.000210	99,184	66.86	74	.037599	63,323	11.05	.025717	75,064	13.10
15	.000595	98,971	60.86	.000274	99,163	65.87	75	.041267	60,942	10.46	.028247	73,134	12.43
16	.000765	98,912	59.90	.000335	99,136	64.89	76	.045411	58,427	9.89	.031187	71,068	11.78
17	.000928	98,836	58.94	.000385	99,103	63.91	77	.049921	55,774	9.34	.034405	68,852	11.14
18	.001077	98,745	58.00	.000418	99,064	62.93	78	.054797	52,990	8.80	.037905	66,483	10.52
19	.001208	98,638	57.06	.000438	99,023	61.96	79	.060154	50,086	8.29	.041808	63,963	9.92
20	.001343	98,519	56.13	.000457	98,980	60.99	80	.066266	47,073	7.78	.046337	61,289	9.33
21	.001470	98,387	55.20	.000479	98,934	60.01	81	.073175	43,954	7.30	.051587	58,449	8.76
22	.001549	98,242	54.28	.000497	98,887	59.04	82	.080723	40,737	6.84	.057503	55,433	8.21
23	.001567	98,090	53.37	.000511	98,838	58.07	83	.088916	37,449	6.39	.064135	52,246	7.68
24	.001540	97,936	52.45	.000523	98,787	57.10	84	.097922	34,119	5.97	.071587	48,895	7.17
25	.001496	97,785	51.53	.000536	98,736	56.13	85	.107951	30,778	5.56	.079984	45,395	6.68
26	.001459	97,639	50.61	.000550	98,683	55.16	86	.119182	27,456	5.18	.089431	41,764	6.22
27	.001432	97,497	49.68	.000567	98,629	54.19	87	.131736	24,183	4.81	.100009	38,029	5.78
28	.001426	97,357	48.75	.000588	98,573	53.22	88	.145669	20,998	4.46	.111773	34,226	5.37
29	.001436	97,218	47.82	.000612	98,515	52.25	89	.160978	17,939	4.14	.124745	30,400	4.98
30	.001454	97,079	46.89	.000641	98,454	51.28	90	.177636	15,051	3.84	.138938	26,608	4.62
31	.001473	96,938	45.96	.000677	98,391	50.32	91	.195594	12,378	3.56	.154348	22,911	4.28
32	.001504	96,795	45.02	.000720	98,325	49.35	92	.214792	9,957	3.30	.170963	19,375	3.98
33	.001546	96,649	44.09	.000772	98,254	48.39	93	.235163	7,818	3.07	.188761	16,062	3.69
34	.001603	96,500	43.16	.000833	98,178	47.42	94	.256634	5,979	2.86	.207711	13,030	3.44
35	.001673	96,345	42.23	.000903	98,096	46.46	95	.277945	4,445	2.67	.226885	10,324	3.20
36	.001761	96,184	41.30	.000982	98,008	45.50	96	.298731	3,209	2.51	.245997	7,982	3.00
37	.001876	96,014	40.37	.001073	97,911	44.55	97	.318602	2,251	2.36	.264731	6,018	2.81
38	.002021	95,834	39.44	.001179	97,806	43.59	98	.337164	1,534	2.24	.282754	4,425	2.65
39	.002193	95,641	38.52	.001299	97,691	42.65	99	.354023	1,017	2.12	.299719	3,174	2.49
40	.002391	95,431	37.61	.001430	97,564	41.70	100	.371724	657	2.01	.317702	2,223	2.35
41	.002607	95,203	36.69	.001570	97,425	40.76	101	.390310	413	1.90	.336764	1,516	2.20
42	.002842	94,955	35.79	.001720	97,272	39.82	102	.409825	252	1.80	.356970	1,006	2.07
43	.003091	94,685	34.89	.001878	97,104	38.89	103	.430317	148	1.70	.378389	647	1.94
44	.003360	94,392	34.00	.002046	96,922	37.96	104	.451833	85	1.60	.401092	402	1.82
45	.003646	94,075	33.11	.002229	96,724	37.04	105	.474424	46	1.51	.425157	241	1.70
46	.003960	93,732	32.23	.002423	96,508	36.12	106	.498145	24	1.42	.450667	138	1.59
47	.004316	93,361	31.35	.002622	96,274	35.21	107	.523053	12	1.34	.477707	76	1.48
48	.004721	92,958	30.49	.002826	96,022	34.30	108	.549205	6	1.26	.506369	40	1.38
49	.005166	92,519	29.63	.003038	95,750	33.39	109	.576666	3	1.18	.536751	20	1.28

(Continued)

Table 4.C6—Period life table, 2006—Continued

Exact age	Male			Female			Exact age	Male			Female		
	Death probability ^a	Number of lives ^b	Life expectancy	Death probability ^a	Number of lives ^b	Life expectancy		Death probability ^a	Number of lives ^b	Life expectancy	Death probability ^a	Number of lives ^b	Life expectancy
50	.005660	92,041	28.78	.003275	95,460	32.49	110	.605499	1	1.11	.568956	9	1.19
51	.006171	91,520	27.94	.003535	95,147	31.60	111	.635774	0	1.03	.603094	4	1.10
52	.006653	90,955	27.11	.003798	94,811	30.71	112	.667563	0	0.97	.639279	2	1.02
53	.007085	90,350	26.29	.004061	94,450	29.83	113	.700941	0	0.90	.677636	1	0.94
54	.007498	89,710	25.48	.004338	94,067	28.94	114	.735988	0	0.84	.718294	0	0.86
55	.007936	89,037	24.66	.004640	93,659	28.07	115	.772787	0	0.78	.761392	0	0.79
56	.008451	88,331	23.86	.004993	93,224	27.20	116	.811426	0	0.72	.807076	0	0.72
57	.009063	87,584	23.06	.005419	92,759	26.33	117	.851998	0	0.66	.851998	0	0.66
58	.009797	86,790	22.26	.005936	92,256	25.47	118	.894598	0	0.61	.894598	0	0.61
59	.010643	85,940	21.48	.006534	91,708	24.62	119	.939328	0	0.56	.939328	0	0.56

SOURCES: National Center for Health Statistics and Census Bureau.

NOTE: The period life expectancy at a given age for 2006 represents the average number of years of life remaining if a group of persons at that age were to experience the mortality rates for 2006 over the course of their remaining lives.

- a. Probability of dying within one year.
b. Number of survivors out of 100,000 born alive.

CONTACT: Felicitie Bell (410) 965-3020, Michael Morris (410) 965-3045, or supplement@ssa.gov.

A vertical strip on the left side of the page shows a close-up of the stars and stripes of the American flag. The stars are white and set against a dark background, while the stripes are horizontal and alternating in color.

Old-Age, Survivors, and Disability Insurance

Benefits in Current-Payment Status

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5.A OASDI Current-Pay Benefits: Summary

Table 5.A1—Number and average monthly benefit, by type of benefit and race, December 2009

Type of benefit	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Total, OASDI	52,522,819	1,064.40	43,547,872	1,103.10	5,722,458	905.30	2,864,708	798.70
OASI	42,828,705	1,097.80	36,618,243	1,130.40	3,883,525	942.00	2,065,963	820.40
Retirement benefits	36,419,065	1,117.20	31,491,711	1,143.90	3,022,136	997.20	1,693,075	843.60
Retired workers	33,514,013	1,164.30	29,037,349	1,190.00	2,810,550	1,034.60	1,474,515	912.50
Spouses of retired workers	2,343,601	574.20	2,049,429	596.60	108,781	484.00	169,920	369.10
Children of retired workers	561,451	570.40	404,933	602.60	102,805	517.40	48,640	414.40
Survivor benefits	6,409,640	987.40	5,126,532	1,047.80	861,389	748.20	372,888	715.10
Children of deceased workers	1,921,148	747.40	1,270,359	805.50	426,761	624.50	199,069	630.30
Widowed mothers and fathers	159,870	841.60	111,746	897.30	22,495	714.50	22,295	682.00
Nondisabled widow(er)s	4,090,496	1,123.50	3,572,127	1,155.00	364,057	914.10	136,206	853.70
Disabled widow(er)s	236,480	682.70	171,519	708.60	47,902	605.20	14,669	619.90
Parents of deceased workers	1,646	987.80	781	1,031.00	174	976.40	649	942.20
DI	9,694,114	917.00	6,929,629	958.80	1,838,933	827.80	798,745	742.50
Disabled workers	7,788,013	1,064.30	5,658,054	1,099.00	1,437,673	979.60	589,232	916.00
Spouses of disabled workers	158,122	286.50	121,398	298.70	17,257	257.30	17,071	229.30
Children of disabled workers	1,747,979	317.90	1,150,177	338.70	384,003	285.00	192,442	256.60

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

Through 2008, beneficiaries whose record indicated more than one race were classified as "other." Beginning with 2009, these beneficiaries are classified as persons of unknown race.

- a. Includes 387,781 persons of unknown race.
- b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.1—Number and average monthly benefit for retired workers, by sex, age, and race, December 2009

Age	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All retired workers								
Total	33,514,013	1,164.30	29,037,349	1,190.00	2,810,550	1,034.60	1,474,515	912.50
62–64	3,133,930	1,025.40	2,557,281	1,052.30	279,517	960.90	235,953	778.80
62	958,622	1,002.20	772,719	1,025.70	83,743	947.60	76,033	770.60
63	1,125,098	1,033.00	912,823	1,061.90	99,207	969.10	91,424	784.90
64	1,050,210	1,038.30	871,739	1,065.80	96,567	964.00	68,496	779.70
65–69	9,092,526	1,218.90	7,715,942	1,248.80	816,566	1,103.10	501,084	954.70
65	1,249,001	1,076.70	1,055,445	1,103.20	108,392	995.40	74,669	821.80
66	2,129,121	1,221.10	1,800,522	1,250.50	190,961	1,104.40	123,626	977.60
67	2,097,637	1,244.40	1,782,871	1,274.90	185,856	1,119.50	115,470	981.50
68	1,872,571	1,255.50	1,593,462	1,286.00	170,980	1,131.50	96,772	980.80
69	1,744,196	1,247.90	1,483,642	1,278.80	160,377	1,125.00	90,547	971.30
70–74	7,503,343	1,186.60	6,454,712	1,214.10	672,136	1,062.30	344,160	926.60
70	1,653,156	1,228.00	1,410,095	1,257.90	151,385	1,103.40	83,427	962.50
71	1,611,583	1,214.30	1,385,821	1,242.60	142,878	1,089.40	75,527	944.50
72	1,497,801	1,193.50	1,288,061	1,221.30	135,109	1,069.20	68,342	926.20
73	1,400,734	1,151.80	1,210,210	1,178.00	122,924	1,030.30	62,067	892.40
74	1,340,069	1,131.10	1,160,525	1,156.40	119,840	1,003.10	54,797	886.30
75–79	5,667,154	1,135.10	4,981,481	1,158.70	469,583	991.40	196,898	893.40
75	1,259,592	1,127.10	1,095,839	1,151.70	110,840	997.00	48,407	881.30
76	1,153,329	1,131.40	1,006,284	1,156.00	99,408	994.80	43,543	885.20
77	1,136,167	1,147.20	996,204	1,171.70	97,233	997.30	38,930	908.60
78	1,074,146	1,136.90	953,911	1,159.00	82,763	986.40	33,922	898.90
79	1,043,920	1,133.80	929,243	1,155.80	79,339	977.20	32,096	898.20
80–84	4,239,171	1,148.10	3,810,404	1,168.50	305,588	977.40	112,848	934.20
80	955,510	1,132.80	853,517	1,154.00	71,453	972.20	27,863	909.90
81	915,726	1,148.30	821,304	1,169.10	67,036	979.60	25,122	932.60
82	861,463	1,156.80	775,294	1,177.40	61,719	981.20	22,444	942.70
83	785,078	1,145.90	708,178	1,165.60	55,384	972.90	19,730	937.70
84	721,394	1,160.10	652,111	1,179.50	49,996	982.10	17,689	959.80
85–89	2,584,012	1,139.70	2,348,248	1,157.60	171,734	960.60	58,388	958.90
85	662,921	1,144.20	601,045	1,162.60	44,929	968.90	15,605	954.60
86	579,805	1,136.00	526,588	1,153.80	38,318	961.40	13,650	951.20
87	508,864	1,136.90	461,740	1,155.00	34,267	959.90	11,729	954.00
88	455,997	1,140.00	416,215	1,156.90	29,324	956.90	9,427	972.90
89	376,425	1,140.70	342,660	1,158.80	24,896	949.70	7,977	971.30
90–94	1,011,208	1,222.70	918,929	1,242.00	69,597	1,009.70	19,810	1,077.40
95 or older	282,669	1,204.10	250,352	1,230.10	25,829	972.30	5,374	1,073.50
Men								
Subtotal	17,067,434	1,311.70	14,820,157	1,348.00	1,305,816	1,120.00	820,929	972.70
62–64	1,555,421	1,190.80	1,252,027	1,239.80	139,948	1,022.90	121,668	854.70
62	470,201	1,166.00	371,988	1,211.60	41,453	1,007.20	38,694	852.20
63	559,583	1,199.80	448,032	1,251.60	49,750	1,031.10	47,015	861.30
64	525,637	1,203.20	432,007	1,252.00	48,745	1,027.90	35,959	848.60
65–69	4,806,458	1,403.90	4,084,303	1,451.80	401,063	1,193.70	281,761	1,024.40
65	629,221	1,246.70	528,790	1,293.10	54,346	1,065.00	39,371	884.30
66	1,130,022	1,405.50	957,439	1,453.00	93,958	1,193.60	69,274	1,049.60
67	1,118,170	1,431.70	952,528	1,479.70	91,326	1,212.60	65,220	1,053.50
68	998,467	1,443.70	851,812	1,491.60	83,614	1,228.90	55,273	1,048.00
69	930,578	1,432.00	793,734	1,480.00	77,819	1,223.90	52,623	1,035.40

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.1—Number and average monthly benefit for retired workers, by sex, age, and race, December 2009—Continued

Age	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Men (cont.)</i>								
70–74	3,981,420	1,345.40	3,436,360	1,385.60	323,146	1,155.80	201,504	981.10
70	877,595	1,403.10	750,519	1,448.60	73,150	1,201.40	48,531	1,023.40
71	854,660	1,384.50	736,980	1,426.90	68,901	1,187.50	44,107	1,003.20
72	795,395	1,354.40	686,324	1,395.10	65,162	1,165.50	39,974	981.40
73	743,405	1,297.40	644,432	1,334.90	58,812	1,118.00	36,718	941.30
74	710,365	1,267.10	618,105	1,301.90	57,121	1,087.10	32,174	932.10
75–79	2,979,169	1,262.00	2,637,325	1,292.70	218,393	1,069.10	112,440	934.80
75	667,559	1,257.50	583,858	1,290.90	52,629	1,076.60	28,338	921.30
76	608,733	1,260.40	534,689	1,293.10	46,571	1,073.70	25,068	926.60
77	596,199	1,279.60	526,602	1,311.60	45,437	1,075.00	22,006	952.00
78	562,498	1,259.70	503,671	1,287.30	37,789	1,061.00	19,071	941.20
79	544,180	1,252.60	488,505	1,279.40	35,967	1,053.40	17,957	939.50
80–84	2,111,765	1,258.10	1,915,672	1,281.50	130,985	1,052.80	60,402	978.60
80	491,601	1,245.60	443,301	1,270.40	31,694	1,049.50	15,236	950.90
81	463,220	1,265.00	419,512	1,289.30	29,169	1,055.60	13,479	979.80
82	429,087	1,270.90	389,778	1,294.40	26,394	1,058.10	12,028	991.70
83	383,910	1,247.20	349,482	1,269.20	23,233	1,043.40	10,462	981.50
84	343,947	1,262.90	313,599	1,284.40	20,495	1,058.00	9,197	1,002.00
85–89	1,168,718	1,203.40	1,070,183	1,221.70	65,326	1,015.80	31,101	982.20
85	310,282	1,231.40	283,397	1,251.40	17,998	1,035.00	8,358	989.80
86	267,739	1,207.70	244,783	1,226.60	15,076	1,020.40	7,397	976.80
87	229,171	1,197.20	209,465	1,215.80	12,988	1,012.80	6,285	972.10
88	200,801	1,188.10	184,936	1,204.10	10,523	1,004.60	4,992	992.40
89	160,725	1,170.30	147,602	1,186.70	8,741	986.80	4,069	979.30
90–94	384,134	1,298.50	352,432	1,316.30	21,251	1,088.60	9,579	1,110.10
95 or older	80,349	1,346.80	71,855	1,372.10	5,704	1,097.20	2,474	1,147.60
<i>Women</i>								
Subtotal	16,446,579	1,011.40	14,217,192	1,025.40	1,504,734	960.50	653,586	836.80
62–64	1,578,509	862.40	1,305,254	872.40	139,569	898.70	114,285	698.00
62	488,421	844.50	400,731	853.10	42,290	889.10	37,339	686.00
63	565,515	868.00	464,791	879.00	49,457	906.80	44,409	703.90
64	524,573	873.10	439,732	882.80	47,822	898.90	32,537	703.60
65–69	4,286,068	1,011.40	3,631,639	1,020.40	415,503	1,015.60	219,323	865.20
65	619,780	904.00	526,655	912.50	54,046	925.50	35,298	752.00
66	999,099	1,012.50	843,083	1,020.60	97,003	1,017.90	54,352	885.80
67	979,467	1,030.50	830,343	1,039.80	94,530	1,029.60	50,250	888.20
68	874,104	1,040.60	741,650	1,049.90	87,366	1,038.30	41,499	891.20
69	813,618	1,037.30	689,908	1,047.20	82,558	1,031.70	37,924	882.20
70–74	3,521,923	1,007.20	3,018,352	1,018.80	348,990	975.70	142,656	849.50
70	775,561	1,029.90	659,576	1,040.80	78,235	1,011.80	34,896	877.70
71	756,923	1,022.10	648,841	1,033.20	73,977	998.00	31,420	862.00
72	702,406	1,011.20	601,737	1,023.10	69,947	979.60	28,368	848.50
73	657,329	987.10	565,778	999.20	64,112	949.80	25,349	821.70
74	629,704	977.60	542,420	990.50	62,719	926.50	22,623	821.20
75–79	2,687,985	994.40	2,344,156	1,008.00	251,190	923.80	84,458	838.20
75	592,033	980.00	511,981	992.90	58,211	925.10	20,069	824.90
76	544,596	987.10	471,595	1,000.70	52,837	925.20	18,475	829.10
77	539,968	1,001.10	469,602	1,014.80	51,796	929.20	16,924	852.20
78	511,648	1,001.90	450,240	1,015.40	44,974	923.60	14,851	844.50
79	499,740	1,004.40	440,738	1,018.70	43,372	914.10	14,139	845.70

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.1—Number and average monthly benefit for retired workers, by sex, age, and race, December 2009—Continued

Age	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Women (cont.)</i>								
80–84	2,127,406	1,038.80	1,894,732	1,054.30	174,603	920.80	52,446	883.10
80	463,909	1,013.20	410,216	1,028.10	39,759	910.50	12,627	860.50
81	452,506	1,028.80	401,792	1,043.60	37,867	921.00	11,643	878.00
82	432,376	1,043.50	385,516	1,059.00	35,325	923.80	10,416	886.20
83	401,168	1,048.90	358,696	1,064.70	32,151	922.00	9,268	888.20
84	377,447	1,066.30	338,512	1,082.30	29,501	929.30	8,492	914.10
85–89	1,415,294	1,087.00	1,278,065	1,103.90	106,408	926.70	27,287	932.50
85	352,639	1,067.50	317,648	1,083.40	26,931	924.70	7,247	914.00
86	312,066	1,074.40	281,805	1,090.50	23,242	923.20	6,253	921.00
87	279,693	1,087.50	252,275	1,104.50	21,279	927.60	5,444	933.10
88	255,196	1,102.10	231,279	1,119.20	18,801	930.10	4,435	951.00
89	215,700	1,118.60	195,058	1,137.70	16,155	929.60	3,908	963.10
90–94	627,074	1,176.20	566,497	1,195.80	48,346	975.00	10,231	1,046.70
95 or older	202,320	1,147.40	178,497	1,172.90	20,125	936.90	2,900	1,010.30

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

Through 2008, beneficiaries whose record indicated more than one race were classified as "other." Beginning with 2009, these beneficiaries are classified as persons of unknown race.

a. Includes 191,599 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

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5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.2—Number and average monthly benefit for disabled workers, by sex, age, and race, December 2009

Age	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>All disabled workers</i>								
Total	7,788,013	1,064.30	5,658,054	1,099.00	1,437,673	979.60	589,232	916.00
Under 20	1,289	411.40	485	406.00	221	411.00	156	423.70
20–24	52,920	571.40	31,738	571.00	11,840	561.00	6,754	601.60
20	2,828	457.90	1,212	460.20	574	449.70	353	486.40
21	5,809	502.40	3,427	499.90	1,273	497.90	748	513.00
22	10,137	546.00	6,155	543.90	2,339	534.10	1,254	576.60
23	14,663	584.00	8,909	581.60	3,314	572.40	1,898	614.40
24	19,483	612.30	12,035	608.50	4,340	599.90	2,501	647.20
25–29	169,201	688.80	107,142	690.50	36,988	664.50	20,499	720.80
25	24,312	635.80	15,114	633.60	5,392	618.20	3,010	676.40
26	29,101	658.50	18,289	658.20	6,443	639.40	3,595	690.10
27	34,080	681.90	21,407	683.40	7,435	657.70	4,290	710.90
28	38,543	707.10	24,477	709.40	8,358	680.00	4,698	740.40
29	43,165	728.20	27,855	731.30	9,360	699.80	4,906	760.60
30–34	261,831	781.90	173,923	790.50	55,792	740.30	27,437	806.40
30	47,423	749.80	30,975	757.20	10,279	711.00	5,194	776.70
31	49,628	765.20	32,737	770.60	10,762	729.30	5,218	797.90
32	52,774	781.80	35,005	790.80	11,401	737.80	5,411	807.90
33	54,444	796.00	36,320	805.30	11,463	754.10	5,747	814.00
34	57,562	809.70	38,886	819.70	11,887	764.50	5,867	831.60
35–39	386,763	855.40	266,640	867.50	77,157	806.00	37,703	864.60
35	62,081	828.50	42,112	839.50	12,736	782.40	6,271	842.20
36	67,101	836.60	45,854	848.80	13,537	788.00	6,750	846.90
37	74,988	851.50	51,270	861.80	15,255	805.00	7,457	868.30
38	86,150	863.90	59,911	876.30	16,923	814.50	8,218	869.20
39	96,443	881.40	67,493	894.30	18,706	828.10	9,007	886.00
40–44	599,631	916.20	419,399	935.70	117,888	852.10	55,870	898.70
40	101,176	893.80	70,789	908.20	19,500	837.80	9,676	894.90
41	107,633	904.60	75,102	920.60	21,010	845.60	10,231	900.00
42	116,452	913.30	81,074	933.00	23,001	850.30	11,104	893.50
43	128,926	924.30	90,049	945.80	25,659	857.30	11,929	900.20
44	145,444	935.70	102,385	959.20	28,718	863.30	12,930	903.50
45–49	967,235	976.10	697,437	1,005.00	185,299	889.80	76,412	915.30
45	166,871	948.30	119,013	974.10	32,583	870.70	13,908	907.00
46	178,194	959.20	128,405	986.80	33,852	875.00	14,409	904.50
47	191,912	972.40	138,480	1,001.60	36,615	884.20	15,175	912.00
48	209,050	988.40	151,468	1,017.30	39,887	901.00	15,964	923.70
49	221,208	1,002.50	160,071	1,033.70	42,362	910.60	16,956	926.20
50–54	1,360,350	1,054.50	981,523	1,089.20	264,212	964.30	101,806	938.60
50	239,806	1,020.20	173,333	1,053.40	46,405	926.20	18,149	931.70
51	256,538	1,038.30	185,099	1,072.10	49,735	945.40	19,428	940.00
52	276,562	1,052.30	199,485	1,087.40	53,659	960.10	20,759	937.60
53	289,655	1,068.00	208,799	1,103.60	56,679	979.50	21,436	938.50
54	297,789	1,085.00	214,807	1,120.40	57,734	1,000.10	22,034	944.20
55–59	1,706,865	1,137.10	1,240,616	1,171.10	320,180	1,060.70	121,374	953.10
55	317,003	1,103.50	229,206	1,140.10	60,854	1,018.70	23,201	941.10
56	329,220	1,121.00	239,136	1,156.10	62,008	1,040.10	23,911	951.60
57	343,390	1,136.80	250,036	1,170.60	64,208	1,059.90	24,245	954.40
58	355,260	1,152.30	259,108	1,184.60	66,043	1,080.80	24,585	959.60
59	361,992	1,166.60	263,130	1,198.80	67,067	1,099.00	25,432	958.30

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.2—Number and average monthly benefit for disabled workers, by sex, age, and race, December 2009—Continued

Age	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>All disabled workers (cont.)</i>								
60–65	2,281,928	1,199.40	1,739,151	1,231.60	368,096	1,124.10	141,221	954.10
60	384,718	1,180.00	282,831	1,210.80	68,646	1,112.20	25,861	957.10
61	402,073	1,194.60	299,782	1,224.20	68,047	1,125.60	26,285	963.10
62	428,289	1,210.90	328,449	1,240.30	66,231	1,135.10	25,884	965.90
63	393,058	1,210.60	304,767	1,242.40	59,382	1,133.00	23,757	960.50
64	337,508	1,199.20	259,544	1,235.80	54,024	1,121.90	20,881	933.40
65	336,282	1,199.60	263,778	1,234.40	51,766	1,116.10	18,553	935.80
<i>Men</i>								
Subtotal	4,100,400	1,189.40	3,005,142	1,240.50	709,607	1,049.90	318,130	994.00
Under 20	770	418.10	275	417.00	129	411.60	92	430.00
20–24	31,435	590.00	19,082	593.60	6,573	567.00	4,208	619.50
20	1,691	469.30	740	468.30	303	453.40	219	511.20
21	3,469	516.20	2,103	514.10	703	502.00	436	537.80
22	6,010	562.90	3,684	567.80	1,312	531.30	797	587.80
23	8,792	606.20	5,396	608.40	1,857	583.80	1,210	629.80
24	11,473	632.00	7,159	632.10	2,398	607.00	1,546	666.30
25–29	95,185	705.10	60,503	710.20	19,737	666.30	12,255	738.40
25	14,211	652.80	8,914	654.30	2,934	618.30	1,867	697.70
26	16,847	675.30	10,644	678.70	3,561	642.70	2,179	707.70
27	19,281	701.40	12,127	707.70	4,029	661.50	2,564	727.30
28	21,419	724.70	13,633	730.60	4,424	683.60	2,786	758.80
29	23,427	743.50	15,185	748.90	4,789	701.10	2,859	778.50
30–34	136,107	802.80	90,475	815.60	27,493	742.60	15,414	829.10
30	25,204	768.70	16,420	779.50	5,205	714.60	3,002	798.70
31	26,271	784.60	17,344	792.90	5,441	734.10	2,959	821.60
32	27,253	802.70	18,087	816.50	5,563	738.00	3,037	829.70
33	28,027	818.30	18,860	833.40	5,489	755.90	3,137	831.20
34	29,352	833.70	19,764	847.70	5,795	767.60	3,279	861.10
35–39	194,594	889.20	133,535	906.00	37,228	821.40	20,677	895.60
35	31,274	855.40	21,299	870.80	6,119	791.30	3,305	869.40
36	33,614	866.00	22,869	884.40	6,525	796.30	3,662	872.40
37	37,655	886.20	25,555	900.60	7,280	823.80	4,190	896.70
38	43,346	899.80	29,960	916.80	8,192	830.40	4,528	905.80
39	48,705	919.60	33,852	937.20	9,112	849.80	4,992	919.90
40–44	308,454	965.20	214,258	990.10	58,840	882.70	31,221	941.70
40	51,802	935.20	36,022	953.70	9,534	863.00	5,481	931.40
41	55,269	949.40	38,087	971.10	10,638	868.30	5,711	944.40
42	59,848	961.70	41,523	986.60	11,371	881.30	6,139	935.70
43	66,787	976.10	46,315	1,003.10	12,877	892.10	6,766	944.30
44	74,748	990.80	52,311	1,020.20	14,420	899.00	7,124	950.30
45–49	499,108	1,048.40	359,472	1,085.70	92,396	931.10	41,910	979.00
45	85,847	1,009.10	60,945	1,041.80	16,258	907.40	7,767	962.60
46	91,655	1,024.60	65,926	1,059.40	16,847	914.30	7,855	964.80
47	98,837	1,044.00	71,277	1,081.40	18,256	924.20	8,252	977.00
48	108,089	1,064.90	78,245	1,103.40	19,950	943.50	8,752	988.70
49	114,680	1,085.10	83,079	1,126.00	21,085	957.00	9,284	997.50
50–54	706,505	1,162.90	512,562	1,210.90	131,801	1,025.80	54,115	1,024.50
50	124,599	1,112.20	90,190	1,157.40	23,290	977.10	9,855	1,006.60
51	133,814	1,137.90	96,817	1,183.60	24,990	1,002.80	10,549	1,021.10
52	143,977	1,160.30	104,342	1,209.20	26,967	1,019.70	10,987	1,023.50
53	150,166	1,183.10	108,990	1,232.80	28,174	1,045.80	11,316	1,027.70
54	153,949	1,208.40	112,223	1,257.70	28,380	1,072.00	11,408	1,040.80

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.2—Number and average monthly benefit for disabled workers, by sex, age, and race, December 2009—Continued

Age	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Men (cont.)								
55–59	895,303	1,285.40	660,624	1,334.90	155,916	1,148.50	62,873	1,062.20
55	164,596	1,234.50	120,633	1,286.20	29,685	1,092.30	11,960	1,040.70
56	171,463	1,261.70	126,282	1,311.80	30,327	1,122.10	12,328	1,060.60
57	179,332	1,285.00	132,554	1,334.20	31,053	1,149.90	12,635	1,057.30
58	187,166	1,308.30	138,790	1,356.20	32,020	1,175.20	12,749	1,072.60
59	192,746	1,328.10	142,365	1,376.50	32,831	1,196.50	13,201	1,077.80
60–65	1,232,939	1,391.30	954,356	1,439.50	179,494	1,252.90	75,365	1,068.90
60	206,344	1,349.60	154,016	1,396.10	33,648	1,219.60	13,500	1,072.90
61	216,364	1,375.30	163,458	1,421.20	33,214	1,241.30	13,924	1,081.20
62	232,174	1,402.20	179,939	1,448.40	32,673	1,259.80	13,916	1,080.50
63	212,378	1,410.40	167,171	1,457.80	28,829	1,267.50	12,738	1,078.00
64	183,112	1,402.20	143,517	1,454.30	26,296	1,268.70	11,232	1,045.40
65	182,567	1,410.20	146,255	1,459.40	24,834	1,270.60	10,055	1,044.80
Women								
Subtotal	3,687,613	925.20	2,652,912	938.70	728,066	911.00	271,102	824.60
Under 20	519	401.40	210	391.50	92	410.20	64	414.50
20–24	21,485	544.20	12,656	537.00	5,267	553.40	2,546	572.00
20	1,137	441.10	472	447.50	271	445.50	134	445.90
21	2,340	481.90	1,324	477.40	570	492.70	312	478.30
22	4,127	521.50	2,471	508.30	1,027	537.70	457	557.10
23	5,871	550.70	3,513	540.50	1,457	557.90	688	587.30
24	8,010	584.00	4,876	573.80	1,942	591.00	955	616.40
25–29	74,016	667.80	46,639	664.80	17,251	662.40	8,244	694.70
25	10,101	611.80	6,200	603.80	2,458	618.20	1,143	641.80
26	12,254	635.30	7,645	629.80	2,882	635.20	1,416	663.00
27	14,799	656.50	9,280	651.70	3,406	653.30	1,726	686.60
28	17,124	685.00	10,844	682.80	3,934	676.00	1,912	713.50
29	19,738	710.00	12,670	710.20	4,571	698.40	2,047	735.60
30–34	125,724	759.30	83,448	763.20	28,299	738.00	12,023	777.40
30	22,219	728.30	14,555	732.10	5,074	707.20	2,192	746.50
31	23,357	743.30	15,393	745.50	5,321	724.40	2,259	766.90
32	25,521	759.40	16,918	763.20	5,838	737.70	2,374	779.90
33	26,417	772.20	17,460	774.80	5,974	752.50	2,610	793.40
34	28,210	784.80	19,122	790.60	6,092	761.60	2,588	794.20
35–39	192,169	821.30	133,105	829.00	39,929	791.50	17,026	826.80
35	30,807	801.20	20,813	807.60	6,617	774.20	2,966	812.00
36	33,487	807.00	22,985	813.50	7,012	780.40	3,088	816.70
37	37,333	816.50	25,715	823.20	7,975	787.80	3,267	831.80
38	42,804	827.50	29,951	835.70	8,731	799.50	3,690	824.40
39	47,738	842.30	33,641	851.20	9,594	807.50	4,015	843.80
40–44	291,177	864.40	205,141	879.00	59,048	821.60	24,649	844.20
40	49,374	850.30	34,767	861.00	9,966	813.60	4,195	847.30
41	52,364	857.30	37,015	868.70	10,372	822.40	4,520	844.00
42	56,604	862.10	39,551	876.80	11,630	820.00	4,965	841.30
43	62,139	868.60	43,734	885.20	12,782	822.20	5,163	842.40
44	70,696	877.40	50,074	895.40	14,298	827.20	5,806	846.20
45–49	468,127	899.10	337,965	919.00	92,903	848.70	34,502	837.80
45	81,024	883.80	58,068	903.00	16,325	834.10	6,141	836.70
46	86,539	889.90	62,479	910.20	17,005	836.20	6,554	832.30
47	93,075	896.50	67,203	916.90	18,359	844.30	6,923	834.50
48	100,961	906.50	73,223	925.30	19,937	858.50	7,212	844.80
49	106,528	913.50	76,992	934.20	21,277	864.70	7,672	839.80

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.2—Number and average monthly benefit for disabled workers, by sex, age, and race, December 2009—Continued

Age	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Women (cont.)</i>								
50–54	653,845	937.30	468,961	956.10	132,411	903.10	47,691	841.20
50	115,207	920.70	83,143	940.60	23,115	875.10	8,294	842.60
51	122,724	929.80	88,282	949.90	24,745	887.50	8,879	843.60
52	132,585	935.00	95,143	953.80	26,692	899.90	9,772	841.00
53	139,489	944.00	99,809	962.60	28,505	913.90	10,120	838.80
54	143,840	952.90	102,584	970.10	29,354	930.60	10,626	840.40
55–59	811,562	973.50	579,992	984.50	164,264	977.40	58,501	836.00
55	152,407	962.10	108,573	977.80	31,169	948.70	11,241	835.00
56	157,757	968.00	112,854	981.90	31,681	961.50	11,583	835.60
57	164,058	974.80	117,482	985.90	33,155	975.50	11,610	842.40
58	168,094	978.60	120,318	986.60	34,023	992.00	11,836	837.80
59	169,246	982.60	120,765	989.40	34,236	1,005.40	12,231	829.30
60–65	1,048,989	973.90	784,795	978.70	188,602	1,001.60	65,856	822.70
60	178,374	983.80	128,815	989.10	34,998	1,009.00	12,361	830.60
61	185,709	984.20	136,324	988.10	34,833	1,015.20	12,361	830.00
62	196,115	984.40	148,510	988.30	33,558	1,013.60	11,968	832.60
63	180,680	975.90	137,596	980.70	30,553	1,006.00	11,019	824.70
64	154,396	958.50	116,027	965.60	27,728	982.70	9,649	803.00
65	153,715	949.50	117,523	954.50	26,932	973.70	8,498	806.70

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

Through 2008, beneficiaries whose record indicated more than one race were classified as "other." Beginning with 2009, these beneficiaries are classified as persons of unknown race.

a. Includes 103,054 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.3—Number and average monthly benefit for spouses, by marital status, basis of entitlement, age, and race, December 2009

Basis of entitlement and age	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All spouses								
Total	2,501,723	556.00	2,170,827	580.00	126,038	452.90	186,991	356.30
Wives								
Subtotal	2,444,236	561.20	2,137,645	583.60	119,330	456.80	170,588	362.30
By basis of entitlement								
Care of children	113,526	324.90	81,304	350.60	14,393	282.60	16,216	235.70
Under 35	15,506	181.90	10,784	191.30	2,034	157.20	2,418	163.50
35–39	16,090	216.90	11,251	230.70	2,056	189.90	2,520	178.80
40–44	19,956	274.90	13,941	294.40	2,468	246.10	3,259	214.90
45–49	21,997	334.90	15,460	360.90	2,891	295.50	3,334	250.80
50–54	17,924	394.70	12,899	425.30	2,359	348.30	2,447	276.60
55–59	11,648	447.50	8,606	478.70	1,491	388.00	1,400	321.20
60–61	4,283	504.50	3,339	529.10	507	455.20	391	354.90
62–64	6,122	533.90	5,024	555.20	587	450.80	447	392.10
Age	2,330,710	572.70	2,056,341	592.80	104,937	480.70	154,372	375.60
62–64	248,041	480.30	205,524	503.40	13,254	402.20	25,742	338.70
62	67,575	467.30	56,142	487.50	3,543	389.30	6,711	339.00
63	87,878	476.40	72,879	498.80	4,694	401.10	9,075	338.80
64	92,588	493.40	76,503	519.60	5,017	412.40	9,956	338.40
65–69	625,282	588.10	531,781	617.80	31,148	489.50	56,842	372.40
65	118,471	531.50	98,946	559.00	6,461	440.60	11,855	355.70
66	129,959	606.90	110,524	638.90	6,122	500.40	12,051	376.40
67	132,197	606.50	112,842	637.50	6,278	502.50	11,925	376.50
68	124,185	599.30	106,164	628.50	6,239	503.60	10,804	376.40
69	120,470	591.80	103,305	619.00	6,048	502.70	10,207	377.80
70–74	554,341	584.20	486,497	605.60	26,717	500.10	37,940	377.90
70	116,054	587.20	100,316	612.50	5,701	500.80	9,237	374.30
71	115,119	586.80	100,624	609.20	5,658	500.50	8,154	379.10
72	111,809	585.40	98,060	607.10	5,375	503.20	7,715	375.50
73	106,931	580.70	94,600	600.10	4,981	498.70	6,792	379.80
74	104,428	580.30	92,897	598.20	5,002	496.70	6,042	382.60
75–79	454,852	578.80	414,161	592.50	18,602	490.40	20,382	389.70
75	99,942	579.90	89,767	595.80	4,478	496.40	5,275	388.90
76	92,711	578.10	83,802	593.30	3,984	486.90	4,543	386.40
77	91,690	576.80	83,405	590.50	3,868	490.10	4,060	386.30
78	87,198	579.60	80,215	591.70	3,317	486.50	3,382	393.00
79	83,311	579.80	76,972	591.00	2,955	490.70	3,122	396.60
80–84	296,826	578.00	276,061	587.20	10,455	482.90	9,567	423.60
85–89	125,675	580.80	118,238	587.70	3,860	485.90	3,261	442.80
90–94	23,445	628.50	22,023	635.30	780	517.40	573	508.00
95 or older	2,248	653.60	2,056	667.20	121	489.10	65	522.50
Husbands								
Subtotal	57,487	335.90	33,182	348.20	6,708	383.30	16,403	294.10
Under 62	1,875	189.60	1,313	194.80	245	181.20	302	176.30
62–64	3,244	277.20	2,034	273.60	523	305.40	633	266.80
65–69	14,225	391.60	9,003	413.80	1,695	408.20	3,277	325.70
70–74	14,876	341.10	8,213	344.00	1,630	440.20	4,661	306.00
75–79	11,835	323.70	6,233	336.40	1,308	383.40	4,009	285.70
80–84	7,264	314.20	4,022	330.00	810	355.40	2,290	272.00
85–89	3,185	307.90	1,778	320.30	386	338.40	960	274.80
90 or older	983	319.90	586	334.90	111	335.70	271	283.30

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.3—Number and average monthly benefit for spouses, by marital status, basis of entitlement, age, and race, December 2009—Continued

Basis of entitlement and age	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Spouses of retired workers</i>								
Total	2,343,601	574.20	2,049,429	596.60	108,781	484.00	169,920	369.10
<i>Wives</i>								
Subtotal	2,292,184	579.30	2,020,171	600.00	103,200	488.00	154,465	376.30
By basis of entitlement								
Care of children	41,443	500.90	31,248	533.90	4,657	441.90	5,060	351.30
Under 35	1,447	421.60	1,029	452.80	182	346.00	220	340.50
35–39	2,441	426.10	1,778	453.30	279	399.00	363	317.00
40–44	4,868	454.50	3,489	488.50	589	398.90	732	336.70
45–49	8,021	479.50	5,895	513.40	945	429.50	1,086	340.80
50–54	8,894	506.00	6,654	541.30	1,037	448.90	1,094	343.80
55–59	7,335	520.30	5,545	554.60	810	461.10	894	365.40
60–61	3,254	552.10	2,568	577.80	352	506.70	299	379.30
62–64	5,183	566.40	4,290	587.00	463	486.80	372	415.60
Age	2,250,741	580.70	1,988,923	601.00	98,543	490.10	149,405	377.10
62–64	202,988	513.00	166,803	542.20	10,215	429.30	23,190	341.80
62	50,471	513.80	41,331	542.50	2,435	425.40	5,840	344.20
63	71,655	509.30	58,922	537.80	3,612	429.00	8,153	341.60
64	80,862	515.70	66,550	546.00	4,168	431.90	9,197	340.40
65–69	597,734	598.70	509,013	629.30	28,603	501.80	54,971	373.10
65	109,049	546.70	91,010	576.60	5,699	452.70	11,254	356.80
66	122,519	622.30	104,341	655.70	5,456	519.80	11,565	377.40
67	127,296	616.10	108,842	647.70	5,806	515.30	11,548	377.60
68	120,888	605.60	103,506	635.10	5,880	512.10	10,572	377.10
69	117,982	596.40	101,314	623.90	5,762	509.00	10,032	377.40
70–74	548,624	586.30	481,869	607.70	26,111	502.80	37,524	378.20
70	114,218	590.60	98,811	616.00	5,515	505.00	9,109	374.80
71	113,722	589.40	99,479	611.90	5,506	504.20	8,071	379.20
72	110,756	587.30	97,224	609.00	5,265	505.50	7,623	375.90
73	106,114	582.10	93,937	601.50	4,901	501.00	6,731	379.90
74	103,814	581.30	92,418	599.20	4,924	497.90	5,990	382.90
75–79	453,530	579.30	413,109	593.00	18,436	491.40	20,293	389.60
75	99,511	580.70	89,425	596.50	4,429	497.90	5,239	388.70
76	92,398	578.60	83,552	593.80	3,942	487.60	4,525	385.90
77	91,427	577.30	83,189	591.00	3,838	491.80	4,045	386.80
78	87,004	579.90	80,062	592.00	3,285	487.10	3,374	393.30
79	83,190	580.10	76,881	591.20	2,942	491.00	3,110	396.20
80–84	296,552	578.20	275,857	587.40	10,422	483.20	9,533	423.70
85–89	125,625	580.80	118,197	587.70	3,856	486.00	3,256	443.00
90–94	23,442	628.60	22,020	635.30	780	517.40	573	508.00
95 or older	2,246	653.90	2,055	667.20	120	493.10	65	522.50
By marital status								
Nondivorced wives	2,156,324	578.60	1,905,674	599.50	90,003	485.90	147,171	372.60
Divorced wives	135,860	589.00	114,497	608.00	13,197	502.20	7,294	450.60
<i>Husbands</i>								
Subtotal	51,417	347.80	29,258	364.30	5,581	409.90	15,455	297.60

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.3—Number and average monthly benefit for spouses, by marital status, basis of entitlement, age, and race, December 2009—Continued

Basis of entitlement and age	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Spouses of disabled workers								
Total	158,122	286.50	121,398	298.70	17,257	257.30	17,071	229.30
<i>Wives</i>								
Subtotal	152,052	288.60	117,474	301.10	16,130	257.70	16,123	228.80
By basis of entitlement								
Care of children	72,083	223.70	50,056	236.10	9,736	206.40	11,156	183.30
Under 35	14,059	157.20	9,755	163.70	1,852	138.60	2,198	145.80
35–39	13,649	179.40	9,473	189.00	1,777	157.00	2,157	155.50
40–44	15,088	217.00	10,452	229.60	1,879	198.20	2,527	179.60
45–49	13,976	252.00	9,565	266.80	1,946	230.40	2,248	207.20
50–54	9,030	285.20	6,245	301.70	1,322	269.50	1,353	222.30
55–59	4,313	323.50	3,061	341.10	681	301.00	506	243.10
60–61	1,029	354.00	771	366.70	155	338.10	92	275.60
62–64	939	354.50	734	369.00	124	316.40	75	275.90
Age								
62–64	79,969	347.10	67,418	349.30	6,394	335.90	4,967	331.00
62	45,053	333.00	38,721	336.50	3,039	311.00	2,552	310.60
63	17,104	330.20	14,811	333.80	1,108	309.90	871	303.70
64	16,223	331.40	13,957	334.50	1,082	308.00	922	314.50
65–69	11,726	339.20	9,953	343.10	849	316.30	759	313.90
65–69	27,548	358.80	22,768	360.00	2,545	351.20	1,871	349.40
65	9,422	355.50	7,936	357.20	762	350.10	601	336.70
66	7,440	354.10	6,183	355.40	666	341.00	486	352.80
67	4,901	356.70	4,000	358.70	472	344.30	377	343.40
68	3,297	370.00	2,658	372.30	359	363.10	232	345.00
69	2,488	374.60	1,991	371.40	286	374.60	175	402.00
70–74	5,717	385.60	4,628	388.30	606	381.10	416	350.70
70	1,836	380.60	1,505	383.60	186	378.90	128	337.70
71	1,397	375.60	1,145	376.40	152	364.00	83	374.30
72	1,053	387.60	836	391.20	110	395.30	92	336.70
73	817	394.40	663	397.40	80	361.10	61	372.00
74	614	408.00	479	413.50	78	420.30	52	344.60
75 or older	1,651	405.30	1,301	406.60	204	381.00	128	404.40
By marital status								
Nondivorced wives	143,384	286.30	110,541	299.70	15,099	251.60	15,531	225.10
Divorced wives	8,668	325.90	6,933	322.50	1,031	348.10	592	327.60
<i>Husbands</i>								
Subtotal	6,070	234.60	3,924	228.30	1,127	251.50	948	237.50

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

Through 2008, beneficiaries whose record indicated more than one race were classified as "other." Beginning with 2009, these beneficiaries are classified as persons of unknown race.

- a. Includes 17,867 persons of unknown race.
- b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

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5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.4—Number and average monthly benefit for children, by type of benefit, age, and race, December 2009

Age	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All children								
Total	4,230,578	546.40	2,825,469	586.40	913,569	469.70	440,151	443.00
Under age 18	3,158,138	504.20	2,017,616	541.40	704,755	433.70	390,912	430.40
Under 1	12,900	327.10	7,897	345.80	2,968	280.70	1,785	316.70
1	29,477	350.70	17,683	374.10	6,982	292.20	4,279	344.60
2	43,183	373.60	25,902	399.80	10,080	311.40	6,358	359.30
3	56,897	390.90	34,387	418.40	13,348	326.00	8,097	374.60
4	70,424	404.60	42,943	432.10	16,210	339.30	10,069	386.70
5	85,717	415.30	52,613	442.90	19,411	350.00	12,240	395.80
6	102,508	430.10	63,618	459.50	23,071	365.10	14,221	397.80
7	119,770	438.70	74,731	470.10	26,834	371.60	16,349	398.90
8	141,982	446.10	88,881	477.80	31,995	378.20	18,961	405.40
9	164,715	457.80	103,819	488.40	36,998	393.00	21,534	415.40
10	186,226	471.20	118,103	503.30	41,225	405.20	24,170	418.40
11	212,367	480.20	135,446	513.00	47,371	415.50	26,558	420.80
12	235,996	494.30	151,414	529.40	51,994	427.60	29,315	422.40
13	263,575	508.40	170,752	543.70	57,453	442.40	31,751	431.00
14	294,220	524.60	191,475	561.70	63,830	454.80	34,920	437.90
15	334,956	541.20	216,754	580.80	74,624	469.50	39,100	447.90
16	378,856	569.00	244,806	611.80	85,702	490.90	43,366	468.00
17	424,369	585.30	276,392	628.90	94,659	505.20	47,839	478.50
Disabled adult children	920,883	676.30	707,537	701.50	171,974	599.10	36,696	547.70
18–19	16,622	559.10	11,094	584.60	4,034	505.00	1,308	489.00
20–24	83,358	585.20	54,834	613.80	21,546	529.10	6,088	505.40
25–29	86,017	624.70	57,671	651.80	21,772	572.30	5,672	528.80
30–34	82,937	650.50	58,594	672.40	18,625	605.40	4,907	544.80
35–39	96,887	674.20	72,506	693.30	18,995	631.10	4,687	551.40
40–44	113,680	684.30	88,084	704.10	20,919	627.00	4,212	555.80
45–49	127,387	701.60	100,556	723.80	23,022	625.70	3,505	563.80
50–54	106,998	716.80	86,115	739.90	18,104	625.50	2,635	591.10
55–59	77,812	727.10	65,094	748.10	10,938	620.50	1,680	607.20
60–64	53,354	726.80	46,141	745.80	6,238	600.60	899	622.10
65–69	33,049	735.90	28,879	754.70	3,625	599.70	486	623.80
70–74	19,965	696.80	17,582	710.90	2,029	586.10	329	633.30
75–79	12,387	648.70	11,040	659.80	1,182	552.80	153	583.70
80 or older	10,430	600.30	9,347	611.10	945	505.20	135	523.30
Students, aged 18–19	151,557	637.30	100,316	678.70	36,840	554.10	12,543	530.30
18	141,158	637.90	94,172	679.30	33,507	552.10	11,721	529.30
19	10,399	629.20	6,144	669.80	3,333	574.30	822	543.70
Children of retired workers								
Subtotal	561,451	570.40	404,933	602.60	102,805	517.40	48,640	414.40
Under age 18	301,132	556.80	195,368	602.20	66,817	510.50	35,497	395.10
Under 1	609	505.70	368	541.30	135	487.90	99	399.10
1	1,476	492.40	851	530.80	344	474.10	252	389.50
2	2,319	495.30	1,364	535.30	539	491.00	383	368.10
3	3,245	504.60	1,975	544.90	808	485.90	422	358.90
4	4,328	513.30	2,664	552.50	996	497.00	607	371.10
5	5,497	504.20	3,453	539.80	1,253	487.70	735	371.30
6	6,974	508.70	4,452	548.30	1,559	481.80	890	362.00
7	8,438	510.20	5,432	547.50	1,899	483.30	1,010	365.80
8	10,436	511.70	6,698	548.70	2,423	486.00	1,210	360.40
9	12,716	517.80	8,272	556.70	2,807	487.60	1,499	360.20
10	15,168	519.60	9,859	557.30	3,419	486.40	1,714	369.40
11	18,111	523.00	11,729	563.10	4,194	486.30	1,992	368.20
12	21,904	530.00	14,296	569.60	4,858	491.30	2,495	378.20
13	25,910	537.10	16,776	580.00	5,870	496.90	2,945	375.80
14	30,692	548.20	19,976	592.20	6,767	504.10	3,591	385.20
15	36,981	560.40	24,019	605.00	8,250	519.30	4,292	390.10
16	44,047	602.50	28,535	655.70	9,846	537.90	5,150	430.40
17	52,281	614.30	34,649	667.10	10,850	544.50	6,211	440.70

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.4—Number and average monthly benefit for children, by type of benefit, age, and race, December 2009—Continued

Age	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Children of retired workers (cont.)</i>								
Disabled adult children	241,042	581.10	196,441	596.80	31,713	524.50	11,476	468.30
18–19	2,642	572.10	1,831	599.20	585	531.20	201	441.40
20–24	14,825	583.60	10,466	614.80	3,054	525.70	1,176	453.50
25–29	21,123	585.50	15,641	610.10	3,620	531.60	1,650	469.80
30–34	27,403	588.20	21,515	607.20	3,644	530.50	1,976	484.00
35–39	39,315	591.50	32,092	607.70	4,606	537.30	2,296	475.20
40–44	47,191	587.70	39,579	601.10	5,468	529.20	1,909	476.90
45–49	45,367	581.80	38,181	594.50	5,776	527.10	1,264	451.10
50–54	26,501	563.40	22,654	575.30	3,150	500.80	647	450.10
55–59	11,341	547.90	9,884	558.40	1,189	484.00	248	445.70
60–64	4,036	540.50	3,518	551.80	434	468.50	81	434.40
65–69	1,003	552.90	835	569.70	143	475.90	22	440.10
70 or older	295	533.80	245	546.70	44	483.10	6	377.20
Students, aged 18–19	19,277	648.10	13,124	697.20	4,275	571.40	1,667	455.60
18	18,094	650.70	12,427	699.90	3,905	571.70	1,560	454.70
19	1,183	607.40	697	649.70	370	568.50	107	468.50
<i>Children of deceased workers</i>								
Subtotal	1,921,148	747.40	1,270,359	805.50	426,761	624.50	199,069	630.30
Under age 18	1,258,817	742.30	775,129	815.80	289,569	608.00	172,586	628.00
Under 1	2,057	673.50	1,138	754.00	458	532.70	394	603.30
1	6,855	654.80	3,905	719.60	1,547	521.40	1,242	616.30
2	12,268	659.20	6,945	728.60	2,809	524.70	2,205	608.40
3	18,099	658.10	10,301	725.50	4,227	520.10	3,143	613.50
4	23,918	663.90	13,741	733.30	5,541	527.40	4,124	611.80
5	30,627	670.40	17,685	740.50	7,078	532.80	5,219	615.80
6	37,450	688.20	22,052	758.00	8,548	551.40	6,123	620.90
7	44,974	693.90	26,778	765.60	10,260	556.00	7,079	617.60
8	54,069	700.10	32,247	774.70	12,319	560.10	8,479	614.70
9	63,980	708.70	38,369	780.60	14,681	577.60	9,781	620.50
10	73,638	720.80	44,744	792.00	16,670	586.60	10,898	625.90
11	84,697	727.20	51,762	800.00	19,446	592.70	12,035	623.90
12	94,841	738.40	58,693	811.50	21,395	603.50	13,161	621.70
13	106,950	747.60	66,994	819.50	24,019	614.20	14,196	627.80
14	121,899	755.30	76,808	827.30	27,450	619.50	15,667	628.30
15	140,055	766.10	87,665	840.50	32,479	630.40	17,678	634.00
16	160,596	777.00	100,675	850.20	37,889	645.00	19,482	640.20
17	181,844	787.20	114,627	860.60	42,753	653.90	21,680	644.50
Disabled adult children	589,575	751.20	448,867	780.50	118,335	656.60	19,954	638.60
18–19	6,930	743.90	4,364	797.30	1,850	640.20	621	650.20
20–24	36,832	740.20	22,701	792.00	10,853	650.90	2,818	639.80
25–29	41,534	744.10	26,120	789.10	12,305	666.10	2,642	633.10
30–34	40,720	755.60	26,681	793.40	11,485	683.00	2,161	648.90
35–39	48,486	772.50	33,924	806.00	12,251	695.60	2,016	664.20
40–44	62,829	765.80	45,977	801.50	14,477	672.70	2,164	631.20
45–49	81,444	769.60	62,049	804.40	17,020	660.90	2,220	629.30
50–54	80,482	767.40	63,453	798.70	14,948	652.00	1,987	637.10
55–59	66,468	757.60	55,207	782.10	9,749	637.10	1,432	635.10
60–64	49,317	742.00	42,623	761.80	5,803	610.50	818	640.70
65–69	32,046	741.60	28,044	760.20	3,482	604.80	464	632.50
70–74	19,760	698.60	17,410	712.50	2,000	587.60	325	635.80
75–79	12,325	649.20	10,991	660.20	1,171	553.50	151	587.80
80 or older	10,402	600.40	9,323	611.20	941	505.10	135	523.30
Students, aged 18–19	72,756	805.10	46,363	874.10	18,857	676.00	6,529	664.80
18	67,170	808.70	43,209	877.10	16,967	676.50	6,043	666.30
19	5,586	761.60	3,154	832.30	1,890	671.20	486	646.60

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.4—Number and average monthly benefit for children, by type of benefit, age, and race, December 2009—Continued

Age	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Children of disabled workers								
Subtotal	1,747,979	317.90	1,150,177	338.70	384,003	285.00	192,442	256.60
Under age 18	1,598,189	306.80	1,047,119	327.00	348,369	274.20	182,829	250.80
Under 1	10,234	246.80	6,391	261.80	2,375	220.40	1,292	223.00
1	21,146	242.20	12,927	259.50	5,091	210.20	2,785	219.40
2	28,596	241.20	17,593	259.50	6,732	208.00	3,770	212.60
3	35,553	244.60	22,111	264.00	8,313	211.70	4,532	210.40
4	42,178	246.40	26,538	264.00	9,673	215.30	5,338	214.50
5	49,593	247.90	31,475	265.10	11,080	217.70	6,286	215.90
6	58,084	254.20	37,114	271.40	12,964	228.30	7,208	212.80
7	66,358	256.60	42,521	274.10	14,675	228.30	8,260	215.60
8	77,477	260.10	49,936	276.50	17,253	233.10	9,272	219.90
9	88,019	266.80	57,178	282.50	19,510	240.40	10,254	227.70
10	97,420	275.00	63,500	291.50	21,136	249.10	11,558	230.00
11	109,559	282.20	71,955	298.30	23,731	257.80	12,531	234.00
12	119,251	293.70	78,425	310.90	25,741	269.40	13,659	238.50
13	130,715	307.00	86,982	324.20	27,564	281.10	14,610	251.00
14	141,629	320.90	94,691	339.80	29,613	290.90	15,662	259.50
15	157,920	337.20	105,070	358.50	33,895	303.10	17,130	270.40
16	174,213	368.70	115,596	393.40	37,967	325.00	18,734	299.30
17	190,244	384.50	127,116	409.50	41,056	340.00	19,948	309.80
Disabled adult children	90,266	441.80	62,229	461.80	21,926	396.70	5,266	376.40
18–19	7,050	372.50	4,899	389.70	1,599	338.90	486	302.80
20–24	31,701	405.90	21,667	426.50	7,639	357.20	2,094	353.70
25–29	23,360	447.80	15,910	467.40	5,847	400.30	1,380	399.50
30–34	14,814	477.10	10,398	496.70	3,496	428.20	770	408.80
35–39	9,086	507.70	6,490	526.90	2,138	464.00	375	411.70
40 or older	4,255	528.50	2,865	546.10	1,207	494.60	161	459.80
Students, aged 18–19	59,524	428.70	40,829	451.00	13,708	381.00	4,347	356.80
18	55,894	428.40	38,536	450.90	12,635	378.90	4,118	356.60
19	3,630	432.70	2,293	452.40	1,073	405.60	229	360.50

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

Through 2008, beneficiaries whose record indicated more than one race were classified as "other." Beginning with 2009, these beneficiaries are classified as persons of unknown race.

- a. Includes 51,389 persons of unknown race.
- b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.5—Number and average monthly benefit for widowed mothers and fathers, by age, sex, marital status, and race, December 2009

Age, sex, and marital status	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All widowed mothers and fathers	159,870	841.60	111,746	897.30	22,495	714.50	22,295	682.00
By age								
Under 25	1,836	616.60	1,251	639.60	153	494.20	380	595.70
25–29	8,430	674.00	5,623	702.40	958	534.50	1,625	646.90
25	1,003	648.00	663	664.90	123	559.30	189	620.60
26	1,264	658.70	842	688.20	133	492.10	251	637.00
27	1,684	669.60	1,121	699.90	180	526.40	334	633.80
28	1,986	678.60	1,324	705.70	230	536.80	384	658.50
29	2,493	691.40	1,673	723.40	292	546.60	467	662.80
30–34	17,402	701.30	11,611	746.10	2,565	555.10	2,844	648.50
30	2,822	692.10	1,884	729.90	402	549.90	470	663.70
31	3,192	683.80	2,126	726.10	482	528.40	513	650.00
32	3,549	701.40	2,396	746.80	515	559.40	565	632.20
33	3,743	702.40	2,479	749.20	559	558.70	624	647.80
34	4,096	720.10	2,726	769.20	607	573.00	672	651.10
35–39	26,746	766.30	18,163	816.60	3,867	634.00	4,184	666.70
35	4,530	728.10	3,052	775.10	665	590.60	722	650.50
36	4,954	736.20	3,315	784.60	754	598.40	788	659.90
37	5,318	764.40	3,567	817.50	780	628.60	867	666.60
38	5,828	781.20	3,993	835.20	810	645.80	906	661.50
39	6,116	806.50	4,236	853.10	858	692.60	901	690.80
40–44	31,463	846.30	21,850	906.40	4,174	717.60	4,815	683.90
40	6,126	815.30	4,248	873.50	814	675.70	938	672.40
41	5,939	837.10	4,059	898.10	849	706.30	925	685.40
42	6,286	842.10	4,322	903.60	859	714.40	980	683.10
43	6,303	865.10	4,378	925.10	779	752.00	1,020	688.70
44	6,809	868.90	4,843	927.60	873	740.20	952	689.70
45–49	32,607	913.10	23,338	973.20	4,286	786.60	4,305	702.30
45	6,929	893.80	4,945	953.00	868	758.80	971	698.50
46	6,798	902.70	4,859	957.90	870	779.30	928	709.30
47	6,621	917.00	4,742	981.20	863	803.90	883	687.00
48	6,304	923.30	4,523	981.80	845	790.50	796	721.60
49	5,955	932.50	4,269	995.90	840	801.20	727	696.00
50–54	21,367	942.80	15,337	1,002.50	2,992	804.30	2,528	720.00
50	5,309	933.50	3,812	991.40	682	803.50	674	729.60
51	4,789	944.00	3,436	1,010.20	676	789.20	565	710.80
52	4,360	948.30	3,148	1,004.70	634	805.60	489	741.20
53	3,665	950.90	2,598	1,011.90	526	805.40	440	709.40
54	3,244	939.40	2,343	996.00	474	823.90	360	700.30
55–59	10,614	934.80	7,538	986.90	1,796	823.50	1,050	715.60
55	2,724	922.60	1,930	983.70	438	794.70	297	683.70
56	2,367	931.60	1,663	987.50	404	811.30	240	707.20
57	2,030	947.60	1,455	997.20	319	839.80	209	746.30
58	1,776	933.00	1,284	977.90	293	839.40	165	713.80
59	1,717	945.00	1,206	988.30	342	845.80	139	754.00
60–61	3,294	918.40	2,427	961.50	591	789.90	224	743.80
60	1,671	920.60	1,201	964.60	315	787.50	128	787.80
61	1,623	916.10	1,226	958.40	276	792.60	96	685.20
62 or older	6,111	906.40	4,608	946.40	1,113	799.80	340	700.20

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.5—Number and average monthly benefit for widowed mothers and fathers, by age, sex, marital status, and race, December 2009—Continued

Age, sex, and marital status	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
By sex and marital status								
Women	148,505	850.60	103,767	908.90	20,653	716.50	20,883	684.70
Mothers	135,201	851.00	93,176	912.60	19,266	715.40	19,758	684.30
Surviving divorced mothers	13,304	846.80	10,591	876.50	1,387	730.90	1,125	691.20
Men	11,365	724.10	7,979	745.80	1,842	692.50	1,412	641.30

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

Through 2008, beneficiaries whose record indicated more than one race were classified as "other." Beginning with 2009, these beneficiaries are classified as persons of unknown race.

a. Includes 3,334 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.6—Number and average monthly benefit for nondisabled widow(er)s, by sex, age, marital status, and race, December 2009

Age, sex, and marital status	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All nondisabled widow(er)s	4,090,496	1,123.50	3,572,127	1,155.00	364,057	914.10	136,206	853.70
Women								
Subtotal	4,030,494	1,125.90	3,527,262	1,157.20	354,445	913.90	131,498	855.70
<i>By age</i>								
60–61	117,182	1,094.00	90,114	1,143.80	15,821	945.30	9,157	831.90
60	46,456	1,090.80	35,475	1,140.00	6,336	954.70	3,852	832.70
61	70,726	1,096.20	54,639	1,146.20	9,485	939.10	5,305	831.40
62–64	296,663	1,128.10	240,949	1,169.60	34,474	967.30	17,666	854.00
62	96,538	1,127.10	77,795	1,168.50	11,336	970.20	5,987	852.50
63	101,362	1,131.60	82,847	1,171.80	11,399	972.20	5,888	856.60
64	98,763	1,125.40	80,307	1,168.40	11,739	959.70	5,791	852.90
65–69	606,938	1,199.70	512,622	1,242.10	62,044	995.00	28,650	883.20
65	118,515	1,133.70	97,958	1,175.50	13,310	951.60	6,345	862.60
66	132,284	1,241.40	111,947	1,282.90	13,180	1,039.90	6,251	918.40
67	128,322	1,236.20	109,214	1,279.30	12,587	1,018.00	5,825	893.80
68	115,983	1,201.50	98,707	1,243.40	11,538	988.10	5,163	880.10
69	111,834	1,176.60	94,796	1,218.50	11,429	975.20	5,066	856.70
70–74	533,597	1,116.20	456,745	1,153.80	54,572	914.80	20,502	822.80
70	101,200	1,145.50	85,769	1,186.80	10,537	941.30	4,503	840.90
71	102,791	1,124.60	87,805	1,163.30	10,486	919.00	4,122	827.50
72	103,301	1,109.70	88,381	1,147.80	10,618	907.60	3,998	812.20
73	109,778	1,103.60	94,158	1,139.10	11,297	910.50	3,980	821.50
74	116,527	1,101.20	100,632	1,136.30	11,634	897.60	3,899	808.90
75–79	657,691	1,105.60	576,922	1,137.40	60,299	893.30	18,684	818.50
75	122,238	1,106.20	105,976	1,139.60	12,164	907.60	3,733	813.20
76	120,929	1,102.80	105,212	1,136.50	11,673	893.50	3,711	812.20
77	130,686	1,101.30	114,238	1,133.90	12,269	890.90	3,816	813.10
78	136,381	1,107.00	120,770	1,136.80	11,718	888.20	3,549	826.00
79	147,457	1,109.90	130,726	1,139.90	12,475	886.20	3,875	828.10
80–84	750,838	1,103.90	674,260	1,130.10	57,847	877.40	17,103	847.00
80	147,554	1,109.60	131,645	1,138.40	11,921	881.30	3,665	834.10
81	150,674	1,105.10	134,950	1,132.20	11,894	880.30	3,513	834.30
82	154,313	1,104.50	138,538	1,130.20	11,997	882.00	3,421	851.70
83	151,213	1,099.00	136,182	1,123.50	11,327	877.90	3,374	858.80
84	147,084	1,101.30	132,945	1,126.20	10,708	864.20	3,130	858.40
85–89	645,775	1,112.20	589,398	1,134.60	42,365	862.90	12,424	890.70
85	146,305	1,098.00	132,789	1,121.50	10,210	862.30	2,991	862.70
86	137,619	1,102.90	125,386	1,125.80	9,163	854.10	2,721	889.30
87	129,566	1,110.10	118,101	1,132.30	8,621	865.70	2,535	902.50
88	124,222	1,122.30	114,029	1,143.30	7,678	869.50	2,200	899.90
89	108,063	1,134.10	99,093	1,156.40	6,693	864.60	1,977	909.90
90–94	309,542	1,149.20	284,251	1,172.20	18,940	858.30	5,439	942.90
95 or older	112,268	1,082.20	102,001	1,106.60	8,083	808.90	1,873	892.50
<i>By marital status</i>								
Widows	3,674,573	1,121.90	3,226,063	1,153.10	312,286	904.10	120,502	847.90
Surviving divorced wives (nondisabled)	355,921	1,167.20	301,199	1,200.40	42,159	986.80	10,996	941.40

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.6—Number and average monthly benefit for nondisabled widow(er)s, by sex, age, marital status, and race, December 2009—Continued

Age, sex, and marital status	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Men								
Subtotal	60,002	961.50	44,865	985.80	9,612	922.20	4,708	797.60
60–61	10,366	855.50	7,853	868.30	1,602	833.10	753	754.10
62–64	18,812	1,013.10	14,652	1,032.00	2,632	959.40	1,228	872.30
65–69	16,930	1,123.10	12,887	1,148.80	2,696	1,047.10	1,125	990.10
70–74	4,304	891.00	2,820	915.30	942	919.60	505	711.70
75–79	3,423	776.30	2,303	794.50	698	815.10	385	614.70
80–84	2,902	717.70	2,017	740.50	515	738.00	341	563.40
85–89	1,960	671.20	1,393	689.60	330	678.60	217	545.50
90 or older	1,305	661.60	940	655.80	197	724.30	154	621.40

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

Through 2008, beneficiaries whose record indicated more than one race were classified as "other." Beginning with 2009, these beneficiaries are classified as persons of unknown race.

- a. Includes 18,106 persons of unknown race.
- b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.7—Number and average monthly benefit for disabled widow(er)s, by age, sex, marital status, and race, December 2009

Age, sex, and marital status	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All disabled widow(er)s	236,480	682.70	171,519	708.60	47,902	605.20	14,669	619.90
By age								
50–54	31,908	666.20	22,363	694.00	6,971	590.10	2,251	607.70
50	2,898	660.40	2,036	684.70	636	595.60	205	597.60
51	4,826	676.40	3,380	708.90	1,068	590.30	347	619.20
52	6,524	663.60	4,581	691.90	1,430	590.50	445	605.20
53	8,084	659.80	5,641	688.20	1,740	581.50	603	600.20
54	9,576	670.00	6,725	695.70	2,097	595.20	651	613.60
55–59	80,240	682.90	56,828	709.30	16,831	608.30	5,610	624.90
55	11,837	678.00	8,322	704.20	2,554	607.90	829	626.90
56	13,721	678.60	9,678	705.50	2,910	602.30	977	618.80
57	16,024	688.00	11,378	713.60	3,346	615.00	1,092	625.30
58	18,282	686.60	13,025	712.30	3,757	611.30	1,279	632.20
59	20,376	681.50	14,425	708.50	4,264	604.60	1,433	620.90
60–65	124,332	686.70	92,328	711.70	24,100	607.30	6,808	619.80
60	22,436	686.60	16,101	711.40	4,571	615.00	1,485	622.30
61	22,602	688.30	16,514	712.60	4,504	612.10	1,342	636.80
62	23,129	686.90	17,408	710.90	4,269	604.10	1,220	618.70
63	21,218	689.40	16,104	712.00	3,855	615.60	1,101	619.30
64	18,845	682.30	14,047	710.80	3,748	593.90	945	602.80
65	16,102	686.00	12,154	712.50	3,153	599.60	715	607.40
By sex and marital status								
Women	225,712	691.50	164,380	718.20	44,980	610.30	14,048	625.40
Widows	193,522	689.10	139,991	716.80	39,001	606.80	12,545	622.40
Surviving divorced wives	32,190	706.30	24,389	726.30	5,979	633.40	1,503	650.60
Men	10,768	497.30	7,139	485.80	2,922	525.30	621	494.30

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

Through 2008, beneficiaries whose record indicated more than one race were classified as "other." Beginning with 2009, these beneficiaries are classified as persons of unknown race.

a. Includes 2,390 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.8—Number and average monthly benefit for parents, by age, sex, and race, December 2009

Age and sex	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All parents	1,646	987.80	781	1,031.00	174	976.40	649	942.20
By age								
62–69	107	1,036.00	23	1,026.60	15	1,051.70	63	1,064.00
70–74	193	1,013.80	68	1,069.30	19	1,032.50	100	982.10
75–79	325	997.20	126	1,079.50	42	1,019.60	146	917.10
80–84	357	995.10	174	1,056.70	34	937.80	143	939.60
85–89	331	995.30	186	1,049.40	28	940.10	109	911.40
90 or older	333	932.70	204	950.20	36	929.60	88	893.60
By sex								
Women	1,447	997.30	734	1,038.30	162	981.10	514	947.90
Men	199	918.50	47	918.30	12	912.10	135	920.30

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

Through 2008, beneficiaries whose record indicated more than one race were classified as "other." Beginning with 2009, these beneficiaries are classified as persons of unknown race.

a. Includes 42 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, sex, age, and race, December 2009

Age and type of benefit	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Retired workers								
Total	24,748,391	1,091.10	21,663,346	1,111.80	1,949,564	983.60	990,779	850.20
62–64	3,133,374	1,025.40	2,556,840	1,052.20	279,441	960.90	235,923	778.80
62	958,509	1,002.20	772,628	1,025.70	83,729	947.60	76,026	770.60
63	1,124,834	1,033.00	912,621	1,061.80	99,164	969.10	91,409	784.80
64	1,050,031	1,038.30	871,591	1,065.80	96,548	964.00	68,488	779.70
65–69	6,882,891	1,144.40	5,906,991	1,170.20	581,347	1,050.70	351,416	873.20
65	1,248,730	1,076.60	1,055,215	1,103.20	108,367	995.40	74,654	821.70
66	1,533,047	1,133.90	1,311,713	1,159.80	128,060	1,040.60	83,440	875.90
67	1,506,141	1,160.30	1,299,188	1,185.70	124,036	1,062.30	73,774	883.20
68	1,345,225	1,176.60	1,161,315	1,201.80	113,958	1,079.00	62,520	893.80
69	1,249,748	1,171.30	1,079,560	1,195.60	106,926	1,075.30	57,028	901.30
70–74	5,250,956	1,115.20	4,602,396	1,135.50	433,077	1,010.70	196,469	878.20
70	1,176,991	1,152.90	1,021,188	1,175.70	100,009	1,052.90	50,648	900.60
71	1,149,152	1,144.90	1,005,084	1,166.20	94,288	1,042.50	45,238	894.10
72	1,046,210	1,124.80	917,914	1,145.00	86,488	1,021.00	38,197	882.20
73	971,190	1,081.30	856,005	1,100.60	77,970	974.80	34,115	847.60
74	907,413	1,053.70	802,205	1,072.00	74,322	939.10	28,271	844.10
75–79	3,831,223	1,046.70	3,429,182	1,063.60	290,991	923.80	100,641	837.90
75	835,731	1,039.70	741,633	1,057.30	67,522	925.50	24,233	828.40
76	771,974	1,041.40	686,439	1,059.00	61,570	922.50	21,774	832.70
77	772,399	1,059.70	689,619	1,077.00	60,679	933.80	19,961	857.00
78	733,478	1,047.10	662,061	1,063.00	51,606	920.90	17,872	834.40
79	717,641	1,046.00	649,430	1,061.80	49,614	913.80	16,801	839.60
80–84	2,953,515	1,062.40	2,692,973	1,077.90	194,585	913.50	60,247	866.60
80	659,556	1,045.80	598,653	1,061.30	44,924	908.90	14,499	845.20
81	634,447	1,062.80	577,403	1,078.30	42,410	917.30	13,369	864.10
82	602,697	1,069.90	549,887	1,085.60	39,752	917.00	11,969	868.60
83	545,495	1,059.70	498,848	1,074.80	35,166	906.00	10,508	869.30
84	511,320	1,077.40	468,182	1,092.50	32,333	918.70	9,902	895.90
85–89	1,803,290	1,059.60	1,659,176	1,073.70	109,157	897.10	31,842	897.70
85	463,002	1,061.20	425,102	1,075.50	28,674	904.20	8,479	890.40
86	404,833	1,054.50	372,321	1,068.30	24,400	895.90	7,439	891.00
87	355,773	1,058.30	326,983	1,072.50	21,757	896.70	6,437	894.70
88	318,690	1,061.20	294,267	1,074.60	18,662	894.50	5,169	911.00
89	260,992	1,064.80	240,503	1,079.20	15,664	889.40	4,318	911.70
90–94	702,473	1,126.10	645,680	1,141.70	44,091	932.10	11,065	998.80
95 or older	190,669	1,086.20	170,108	1,108.60	16,875	882.40	3,176	970.90
Men								
Subtotal	12,182,366	1,221.40	10,647,498	1,251.20	918,974	1,056.70	524,896	908.20
62–64	1,555,073	1,190.80	1,251,749	1,239.80	139,900	1,022.90	121,653	854.70
62	470,124	1,166.10	371,926	1,211.60	41,442	1,007.30	38,691	852.20
63	559,418	1,199.80	447,902	1,251.60	49,726	1,031.10	47,008	861.30
64	525,531	1,203.20	431,921	1,252.00	48,732	1,027.80	35,954	848.60
65–69	3,528,056	1,319.30	3,017,190	1,362.90	290,739	1,131.80	191,966	934.00
65	629,053	1,246.70	528,645	1,293.10	54,333	1,064.90	39,362	884.20
66	784,190	1,307.20	668,026	1,351.70	64,010	1,118.70	45,769	936.20
67	772,615	1,336.70	664,144	1,379.60	62,058	1,144.40	40,388	942.40
68	694,670	1,354.60	598,145	1,396.70	57,017	1,166.40	34,518	953.20
69	647,528	1,346.00	558,230	1,386.30	53,321	1,163.90	31,929	960.80
70–74	2,719,447	1,266.50	2,384,724	1,297.60	214,104	1,093.50	108,927	937.90
70	611,203	1,321.60	529,831	1,358.30	49,757	1,142.60	28,281	964.50
71	597,776	1,309.20	522,715	1,342.80	46,982	1,130.40	25,265	960.70
72	543,416	1,278.90	476,991	1,310.00	43,057	1,106.20	21,155	941.40
73	501,375	1,218.10	442,357	1,246.60	38,270	1,050.70	18,893	898.90
74	465,677	1,177.00	412,830	1,202.70	36,038	1,007.80	15,333	894.20

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, sex, age, and race, December 2009—Continued

Age and type of benefit	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Men (cont.)</i>								
75-79	1,952,070	1,147.60	1,756,668	1,169.00	137,129	981.40	52,614	880.00
75	429,125	1,151.50	382,008	1,175.70	32,635	986.50	13,131	869.90
76	394,636	1,147.10	352,718	1,170.00	29,252	980.90	11,434	876.80
77	393,757	1,166.80	353,597	1,188.90	28,674	993.20	10,326	906.40
78	372,325	1,139.20	338,399	1,158.40	23,765	974.00	9,158	873.40
79	362,227	1,131.50	329,946	1,149.80	22,803	967.20	8,565	874.90
80-84	1,401,459	1,132.30	1,287,881	1,148.60	82,325	964.60	28,918	899.30
80	327,643	1,122.60	299,814	1,139.60	19,974	961.80	7,150	877.90
81	308,952	1,142.20	283,382	1,159.30	18,538	969.40	6,475	902.00
82	285,060	1,144.30	262,377	1,160.80	16,575	970.10	5,691	902.60
83	250,683	1,116.70	231,044	1,131.90	14,293	951.60	5,014	900.10
84	229,121	1,135.00	211,264	1,150.00	12,945	969.70	4,588	923.80
85-89	748,629	1,062.20	693,264	1,074.60	39,399	916.60	15,037	886.50
85	201,240	1,096.40	185,900	1,110.10	11,044	942.40	4,052	901.30
86	172,632	1,069.30	159,601	1,082.10	9,203	921.80	3,609	889.50
87	147,111	1,058.00	136,102	1,070.40	7,769	913.80	3,060	879.40
88	127,561	1,040.60	118,710	1,051.70	6,265	894.00	2,435	885.30
89	100,085	1,015.30	92,951	1,026.00	5,118	883.50	1,881	862.40
90-94	233,536	1,105.80	216,463	1,116.90	12,196	962.30	4,519	972.40
95 or older	44,096	1,089.70	39,559	1,105.20	3,182	941.70	1,262	987.00
<i>Women</i>								
Subtotal	12,566,025	964.70	11,015,848	977.10	1,030,590	918.30	465,883	784.90
62-64	1,578,301	862.40	1,305,091	872.30	139,541	898.70	114,270	697.90
62	488,385	844.50	400,702	853.10	42,287	889.10	37,335	686.00
63	565,416	868.00	464,719	879.00	49,438	906.80	44,401	703.80
64	524,500	873.10	439,670	882.80	47,816	898.90	32,534	703.60
65-69	3,354,835	960.50	2,889,801	969.00	290,608	969.70	159,450	800.00
65	619,677	904.00	526,570	912.50	54,034	925.50	35,292	752.00
66	748,857	952.30	643,687	960.60	64,050	962.70	37,671	802.60
67	733,526	974.50	635,044	983.00	61,978	980.20	33,386	811.50
68	650,555	986.50	563,170	994.80	56,941	991.50	28,002	820.60
69	602,220	983.50	521,330	991.30	53,605	987.30	25,099	825.60
70-74	2,531,509	952.60	2,217,672	961.10	218,973	929.70	87,542	804.00
70	565,788	970.70	491,357	978.80	50,252	964.10	22,367	819.80
71	551,376	966.80	482,369	974.80	47,306	955.20	19,973	809.90
72	502,794	958.30	440,923	966.60	43,431	936.50	17,042	808.80
73	469,815	935.20	413,648	944.40	39,700	901.70	15,222	784.00
74	441,736	923.70	389,375	933.50	38,284	874.30	12,938	784.60
75-79	1,879,153	941.80	1,672,514	952.80	153,862	872.50	48,027	791.90
75	406,606	921.70	359,625	931.60	34,887	868.50	11,102	779.30
76	377,338	930.80	333,721	941.60	32,318	869.60	10,340	784.00
77	378,642	948.40	336,022	959.30	32,005	880.50	9,635	804.00
78	361,153	952.10	323,662	963.30	27,841	875.50	8,714	793.40
79	355,414	959.00	319,484	970.90	26,811	868.50	8,236	802.90
80-84	1,552,056	999.30	1,405,092	1,013.00	112,260	876.00	31,329	836.40
80	331,913	970.00	298,839	982.80	24,950	866.70	7,349	813.40
81	325,495	987.30	294,021	1,000.20	23,872	876.90	6,894	828.60
82	317,637	1,003.10	287,510	1,017.00	23,177	879.00	6,278	837.70
83	294,812	1,011.20	267,804	1,025.60	20,873	874.70	5,494	841.20
84	282,199	1,030.70	256,918	1,045.20	19,388	884.60	5,314	871.80
85-89	1,054,661	1,057.80	965,912	1,073.00	69,758	886.00	16,805	907.60
85	261,762	1,034.10	239,202	1,048.50	17,630	880.30	4,427	880.50
86	232,201	1,043.40	212,720	1,058.00	15,197	880.20	3,830	892.40
87	208,662	1,058.50	190,881	1,073.90	13,988	887.20	3,377	908.60
88	191,129	1,075.50	175,557	1,090.10	12,397	894.70	2,734	933.80
89	160,907	1,095.60	147,552	1,112.80	10,546	892.20	2,437	949.80

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, sex, age, and race, December 2009—Continued

Age and type of benefit	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Women (cont.)</i>								
90–94	468,937	1,136.20	429,217	1,154.20	31,895	920.60	6,546	1,016.90
95 or older	146,573	1,085.20	130,549	1,109.60	13,693	868.60	1,914	960.30
<i>Disabled workers</i>								
Total	70,311	1,284.10	52,958	1,345.00	10,462	1,179.40	6,095	931.80
62	5,113	1,327.50	3,810	1,387.80	688	1,210.40	511	1,012.00
63	14,926	1,321.90	11,066	1,386.90	2,099	1,214.00	1,548	990.30
64	22,281	1,272.90	16,669	1,336.30	3,360	1,179.90	1,992	901.80
65	27,991	1,264.90	21,413	1,322.40	4,315	1,157.30	2,044	896.60
<i>Men</i>								
Subtotal	42,770	1,459.40	32,942	1,532.70	5,537	1,315.00	3,716	1,025.90
62	3,154	1,499.60	2,393	1,572.00	356	1,338.60	324	1,131.10
63	9,204	1,495.50	6,960	1,574.60	1,116	1,346.20	961	1,094.80
64	13,520	1,445.60	10,335	1,524.10	1,800	1,309.50	1,200	979.50
65	16,892	1,443.30	13,254	1,510.40	2,265	1,300.40	1,231	989.70
<i>Women</i>								
Subtotal	27,541	1,011.80	20,016	1,036.00	4,925	1,026.90	2,379	784.80
62	1,959	1,050.50	1,417	1,076.60	332	1,072.80	187	805.70
63	5,722	1,042.70	4,106	1,068.80	983	1,064.00	587	819.20
64	8,761	1,006.40	6,334	1,029.90	1,560	1,030.40	792	784.20
65	11,099	993.40	8,159	1,017.10	2,050	999.10	813	755.60
<i>Spouses</i>								
Total	1,960,906	548.00	1,746,656	564.90	85,805	457.90	116,354	368.60
<i>Wives</i>								
Subtotal	1,942,683	550.30	1,734,785	566.70	83,266	461.20	112,784	371.00
<i>By age</i>								
62–64	247,976	480.30	205,472	503.50	13,246	402.30	25,737	338.70
62	67,555	467.30	56,123	487.50	3,542	389.40	6,711	339.00
63	87,857	476.40	72,861	498.90	4,691	401.10	9,075	338.80
64	92,564	493.40	76,488	519.60	5,013	412.50	9,951	338.40
65–69	559,555	570.10	479,038	596.90	27,740	477.70	48,095	363.80
65	116,671	531.50	97,462	559.00	6,281	440.00	11,725	355.50
66	116,168	578.70	98,429	609.10	5,605	489.50	11,020	361.30
67	115,820	582.40	99,406	610.50	5,524	490.90	9,939	361.50
68	107,628	580.90	93,259	606.30	5,298	486.10	8,317	364.70
69	103,268	578.90	90,482	599.90	5,032	488.20	7,094	383.70
70–74	453,625	571.70	409,372	586.20	20,111	479.00	22,091	395.20
70	98,038	576.60	87,025	595.00	4,557	482.00	5,890	385.50
71	96,212	576.60	86,353	592.20	4,394	483.60	5,019	397.30
72	90,530	574.00	81,813	588.40	3,986	482.50	4,321	394.00
73	86,133	568.20	78,488	580.70	3,586	475.20	3,717	402.90
74	82,712	561.50	75,693	572.70	3,588	469.40	3,144	402.80
75–79	353,456	550.00	329,400	558.20	12,913	464.60	10,138	400.00
75	77,096	551.50	71,087	561.10	3,118	465.60	2,639	400.60
76	71,782	550.00	66,549	559.20	2,824	457.20	2,181	397.50
77	71,467	549.00	66,557	557.30	2,711	464.30	1,983	398.00
78	68,113	550.10	63,924	557.10	2,285	470.40	1,737	401.80
79	64,998	549.40	61,283	555.90	1,975	467.00	1,598	403.20
80–84	225,639	542.30	213,565	548.10	6,714	455.30	4,950	417.00
85–89	87,466	530.40	83,616	534.40	2,160	443.50	1,538	431.60
90–94	14,020	562.90	13,416	566.70	356	467.70	222	489.80
95 or older	946	539.30	906	544.00	26	400.40	13	500.50

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, sex, age, and race, December 2009—Continued

Age and type of benefit	All races ^a		White		Black		Other ^b	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Wives (cont.)</i>								
By type of benefit								
Wives of retired workers	1,869,355	558.50	1,672,632	575.00	77,610	471.10	108,373	373.00
Wives of disabled workers	73,328	339.20	62,153	341.80	5,656	325.90	4,411	321.10
<i>Husbands</i>								
Subtotal	18,223	310.90	11,871	308.80	2,539	349.20	3,570	292.60
<i>Nondisabled widow(er)s</i>								
Total	2,400,263	1,055.70	2,044,377	1,086.40	254,931	883.30	87,814	831.80
60–64	443,023	1,107.80	353,568	1,150.60	54,529	956.60	28,804	845.20
60	50,419	1,072.30	38,462	1,118.90	6,965	944.40	4,149	826.20
61	77,129	1,076.20	59,505	1,123.50	10,458	928.70	5,761	825.90
62	103,547	1,117.90	83,226	1,158.10	12,327	967.60	6,454	853.40
63	107,735	1,125.30	87,854	1,164.40	12,247	972.30	6,298	857.60
64	104,193	1,120.40	84,521	1,162.50	12,532	960.40	6,142	854.60
65–69	544,854	1,167.70	457,829	1,208.20	57,867	977.60	25,792	871.40
65	123,738	1,129.00	101,996	1,170.10	14,104	953.20	6,646	864.00
66	121,376	1,206.70	102,047	1,247.70	12,631	1,019.30	5,860	891.60
67	112,624	1,198.90	95,363	1,240.60	11,544	994.30	5,096	876.70
68	97,427	1,162.20	82,571	1,201.20	10,096	966.70	4,262	869.00
69	89,689	1,134.80	75,852	1,173.10	9,492	949.90	3,928	849.70
70–74	370,160	1,065.00	316,244	1,098.80	40,271	877.20	12,476	817.80
70	75,855	1,099.40	64,195	1,137.10	8,242	908.10	3,128	832.80
71	74,727	1,076.90	63,759	1,111.90	8,002	883.40	2,707	825.60
72	72,054	1,059.20	61,622	1,093.10	7,818	873.90	2,422	803.50
73	73,478	1,050.30	62,975	1,081.60	8,101	871.50	2,183	822.30
74	74,046	1,037.70	63,693	1,069.60	8,108	848.40	2,036	796.40
75–79	356,771	1,016.60	309,577	1,045.50	37,897	834.70	8,372	783.00
75	73,613	1,032.90	63,402	1,062.70	8,173	858.00	1,843	791.60
76	68,874	1,020.10	59,518	1,050.30	7,435	836.80	1,725	773.80
77	70,749	1,012.40	61,250	1,041.90	7,648	829.00	1,670	778.30
78	70,358	1,010.10	61,500	1,037.50	7,137	825.40	1,547	784.40
79	73,177	1,007.30	63,907	1,035.00	7,504	822.10	1,587	786.60
80–84	329,261	979.20	289,949	1,004.10	32,195	797.70	6,406	775.70
85–89	235,524	939.20	209,820	960.90	21,182	757.80	3,972	768.80
90–94	91,676	898.60	81,879	919.60	8,063	716.50	1,488	732.80
95 or older	28,994	833.20	25,511	854.10	2,927	675.40	504	695.70

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

Through 2008, beneficiaries whose record indicated more than one race were classified as "other." Beginning with 2009, these beneficiaries are classified as persons of unknown race.

a. Includes 144,702 persons of unknown race.

b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A4—Number and total monthly benefits, by trust fund and type of benefit, December 1940–2009, selected years

Year	OASDI			Retired workers	Disabled workers	Wives and husbands	Children	Widowed mothers and fathers	Widow(er)s	Parents	Special age-72 beneficiaries
	Total	OASI trust fund	DI trust fund								
<i>Number</i>											
1940	222,488	222,488	...	112,331	...	29,749	54,648	20,499	4,437	824	...
1945	1,288,107	1,288,107	...	518,234	...	159,168	390,134	120,581	93,781	6,209	...
1950	3,477,243	3,477,243	...	1,770,984	...	508,350	699,703	169,438	314,189	14,579	...
1955	7,960,616	7,960,616	...	4,473,971	...	1,191,963	1,276,240	291,916	701,360	25,166	...
1957	11,128,897	10,979,047	149,850	6,197,532	149,850	1,827,048	1,502,077	328,309	1,095,137	28,944	...
1960	14,844,589	14,157,138	687,451	8,061,469	455,371	2,345,983	2,000,451	401,358	1,543,843	36,114	...
1965	20,866,767	19,127,716	1,739,051	11,100,584	988,074	2,806,912	3,092,659	471,816	2,371,433	35,289	...
1966	22,767,252	20,796,930	1,970,322	11,658,443	1,097,190	2,860,026	3,392,970	487,755	2,602,015	34,540	634,313
1970	26,228,629	23,563,634	2,664,995	13,349,175	1,492,948	2,951,552	4,122,305	523,136	3,227,160	28,729	533,624
1975	32,084,511	27,732,311	4,352,200	16,588,001	2,488,774	3,320,310	4,972,008	581,845	3,888,705	21,444	223,424
1980	35,584,955	30,906,511	4,678,444	19,562,085	2,858,680	3,477,427	4,606,517	562,316	4,410,515	14,779	92,636
1985	37,058,317	33,151,003	3,907,314	22,431,930	2,656,638	3,374,599	3,319,490	371,659	4,862,805	9,541	31,655
1990	39,832,125	35,566,144	4,265,981	24,838,100	3,011,294	3,366,975	3,187,010	303,923	5,111,482	5,908	7,433
1991	40,592,173	36,079,133	4,513,040	25,288,719	3,194,938	3,370,454	3,268,252	300,661	5,158,383	5,467	5,299
1992	41,507,188	36,617,492	4,889,696	25,757,727	3,467,783	3,382,189	3,391,173	294,176	5,205,375	5,083	3,682
1993	42,245,719	36,992,153	5,253,566	26,104,305	3,725,966	3,367,206	3,527,483	289,350	5,224,279	4,673	2,457
1994	42,883,470	37,299,951	5,583,519	26,407,756	3,962,954	3,337,484	3,653,887	283,072	5,232,379	4,318	1,620
1995	43,387,259	37,529,603	5,857,656	26,672,806	4,185,263	3,289,551	3,734,097	275,020	5,225,519	3,976	1,027
1996	43,736,836	37,664,802	6,072,034	26,898,072	4,385,623	3,194,080	3,802,791	242,135	5,209,812	3,670	653
1997	43,971,086	37,818,047	6,153,039	27,274,572	4,508,134	3,129,129	3,771,774	230,222	5,053,442	3,419	394
1998	44,245,731	37,911,161	6,334,570	27,510,535	4,698,319	3,054,073	3,768,928	220,610	4,989,855	3,186	225
1999	44,595,624	38,071,894	6,523,730	27,774,677	4,879,455	2,987,307	3,794,795	212,401	4,943,915	2,931	143
2000	45,414,794	38,741,432	6,673,362	28,498,945	5,042,334	2,963,326	3,802,863	203,052	4,901,437	2,748	89
2001	45,877,506	38,964,263	6,913,243	28,836,774	5,274,183	2,898,861	3,839,381	197,375	4,828,327	2,564	41
2002	46,444,317	39,233,049	7,221,268	29,190,137	5,543,981	2,832,767	3,910,256	194,117	4,770,638	2,400	21
2003	47,038,486	39,443,034	7,595,452	29,531,611	5,873,673	2,772,577	3,960,909	190,252	4,707,215	2,238	21
2004	47,687,693	39,737,824	7,949,869	29,952,465	6,198,271	2,721,657	3,986,319	183,829	4,643,035	2,108	9
2005	48,434,281	40,128,579	8,305,702	30,460,836	6,518,989	2,680,259	4,024,815	178,396	4,568,991	1,992	3
2006	49,122,624	40,510,508	8,612,116	30,976,143	6,806,918	2,632,069	4,040,530	171,453	4,493,620	1,889	2
2007	49,864,838	40,948,624	8,916,214	31,527,728	7,098,723	2,584,884	4,050,691	164,665	4,436,338	1,809	--
2008	50,898,244	41,625,450	9,272,794	32,273,651	7,426,691	2,524,841	4,131,594	159,610	4,380,164	1,693	--
2009	52,522,819	42,828,705	9,694,114	33,514,013	7,788,013	2,501,723	4,230,578	159,870	4,326,976	1,646	--

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A4—Number and total monthly benefits, by trust fund and type of benefit, December 1940–2009, selected years—Continued

Year	OASDI			Retired workers	Disabled workers	Wives and husbands	Children	Widowed mothers and fathers	Widow(er)s	Parents	Special age-72 beneficiaries
	Total	OASI trust fund	DI trust fund								
<i>Total monthly benefits (thousands of dollars)</i>											
1940	4,070	4,070	...	2,539	...	361	668	402	90	11	...
1945	23,801	23,801	...	12,538	...	2,040	4,858	2,391	1,893	81	...
1950	126,857	126,857	...	77,678	...	11,995	19,366	5,801	11,481	535	...
1955	411,613	411,613	...	276,942	...	39,416	46,444	13,403	34,152	1,256	...
1957	605,455	594,552	10,904	400,250	10,904	62,802	57,952	16,102	55,944	1,501	...
1960	936,321	888,320	48,000	596,849	40,668	90,503	93,275	23,795	89,054	2,178	...
1965	1,516,802	1,395,817	120,986	931,532	96,599	120,796	159,428	30,882	174,883	2,683	...
1966	1,638,548	1,502,863	135,685	983,338	107,627	123,262	175,100	31,983	192,821	2,642	21,777
1970	2,628,326	2,385,926	242,400	1,576,551	196,010	175,323	279,845	45,258	328,245	2,965	24,128
1975	5,727,758	5,047,656	680,102	3,436,752	562,180	332,159	544,048	85,676	747,903	3,685	15,354
1980	10,682,791	9,422,206	1,260,585	6,678,216	1,059,792	569,528	864,242	138,426	1,358,836	4,080	9,672
1985	15,901,579	14,441,682	1,459,896	10,736,304	1,285,375	796,351	858,006	123,557	2,094,003	3,609	4,373
1990	21,686,763	19,716,655	1,970,108	14,966,531	1,768,313	1,004,852	991,628	124,340	2,827,012	2,849	1,238
1991	23,076,535	20,912,298	2,164,237	15,914,665	1,946,823	1,049,463	1,045,006	127,510	2,989,385	2,767	915
1992	24,442,156	22,033,164	2,408,992	16,810,432	2,171,080	1,089,504	1,100,812	128,748	3,138,250	2,676	655
1993	25,662,445	23,011,870	2,650,575	17,595,964	2,390,829	1,117,643	1,160,403	129,752	3,264,849	2,557	448
1994	26,936,223	24,032,186	2,904,037	18,415,099	2,620,982	1,144,466	1,226,468	131,463	3,394,982	2,459	303
1995	28,148,078	24,993,131	3,154,947	19,199,157	2,853,365	1,164,029	1,283,288	131,430	3,514,262	2,349	197
1996	29,426,079	26,017,474	3,408,605	20,038,023	3,087,223	1,177,458	1,356,685	124,678	3,639,632	2,252	129
1997	30,463,716	26,884,933	3,578,782	20,864,462	3,252,919	1,185,143	1,389,552	122,488	3,646,898	2,173	79
1998	31,298,873	27,519,891	3,778,982	21,449,654	3,444,259	1,179,882	1,417,362	120,247	3,685,349	2,074	46
1999	32,578,327	28,548,030	4,030,297	22,339,070	3,679,691	1,188,814	1,473,988	120,157	3,774,601	1,975	30
2000	34,848,920	30,517,277	4,331,642	24,066,918	3,965,304	1,233,598	1,547,808	120,812	3,912,527	1,934	19
2001	36,504,206	31,823,443	4,680,763	25,215,898	4,295,600	1,246,333	1,624,285	122,526	3,997,687	1,868	9
2002	37,854,453	32,823,008	5,031,445	26,125,090	4,625,445	1,242,317	1,692,471	124,267	4,043,051	1,806	5
2003	39,541,528	34,048,860	5,492,667	27,230,634	5,060,493	1,247,504	1,763,910	126,278	4,110,963	1,744	3
2004	41,574,348	35,573,407	6,000,941	28,601,329	5,542,045	1,262,709	1,838,926	126,734	4,200,895	1,707	2
2005	44,351,668	37,743,696	6,607,972	30,521,815	6,114,705	1,298,722	1,945,508	129,246	4,339,977	1,694	1
2006	46,938,032	39,763,705	7,174,327	32,351,856	6,655,048	1,322,423	2,031,723	129,721	4,445,575	1,685	1
2007	49,218,145	41,552,564	7,665,581	34,004,494	7,127,082	1,333,410	2,095,892	128,742	4,526,864	1,661	--
2008	53,666,109	45,189,225	8,476,883	37,207,910	7,895,536	1,391,746	2,262,489	133,261	4,773,510	1,657	--
2009	55,905,731	47,015,977	8,889,754	39,020,920	8,288,762	1,390,950	2,311,770	134,547	4,757,157	1,626	--

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable; -- = not available.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

Table 5.A5—Number and average age, by type of benefit, December 2009

Type of benefit	Number (thousands)	Average age
Total, OASDI	52,523	66
OASI	42,829	71
Retired workers	33,514	74
Spouses of retired workers	2,344	73
Children of retired workers	561	25
Under age 18	301	13
Disabled adult children	241	40
Students, aged 18–19	19	18
Children of deceased workers	1,921	23
Under age 18	1,259	12
Disabled adult children	590	48
Students, aged 18–19	73	18
Nondisabled widow(er)s	4,090	77
Widowed mothers and fathers	160	44
Disabled widow(er)s	236	59
Parents of deceased workers	2	82
DI	9,694	45
Disabled workers	7,788	53
Spouses of disabled workers	158	55
Children of disabled workers	1,748	13
Under age 18	1,598	12
Disabled adult children	90	27
Students, aged 18–19	60	18

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

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Table 5.A6—Number and average monthly benefit, by age, sex, type of benefit, and race, December 2009

Type of benefit	All races ^a	White	Black	Other ^b
<i>Number (thousands)</i>				
Total, OASDI	52,523	43,548	5,722	2,865
<i>By age and sex</i>				
Adults	48,293	40,723	4,809	2,424
Men	21,307	17,919	2,037	1,162
Women	26,985	22,804	2,772	1,262
Children	4,231	2,825	914	440
Under age 18	3,158	2,018	705	391
Disabled adult children	921	708	172	37
Students, aged 18–19	152	100	37	13
Retired workers and their spouses and children	36,419	31,492	3,022	1,693
Retired workers	33,514	29,037	2,811	1,475
Spouses	2,344	2,049	109	170
Children	561	405	103	49
Disabled workers and their spouses and children	9,694	6,930	1,839	799
Disabled workers	7,788	5,658	1,438	589
Spouses	158	121	17	17
Children	1,748	1,150	384	192
Survivors of deceased workers	6,410	5,127	861	373
Nondisabled widow(er)s	4,090	3,572	364	136
Disabled widow(er)s	236	172	48	15
Widowed mothers and fathers	160	112	22	22
Children	1,921	1,270	427	199
Parents	2	1	^c	1
<i>Average monthly benefit (dollars)</i>				
Retired workers	1,164.30	1,190.00	1,034.60	912.50
Men	1,311.70	1,348.00	1,120.00	972.70
Women	1,011.40	1,025.40	960.50	836.80
Disabled workers	1,064.30	1,099.00	979.60	916.00
Men	1,189.40	1,240.50	1,049.90	994.00
Women	925.20	938.70	911.00	824.60
Widowed mothers and fathers	841.60	897.30	714.50	682.00
Nondisabled widow(er)s	1,123.50	1,155.00	914.10	853.70
Surviving children	747.40	805.50	624.50	630.30

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

Through 2008, beneficiaries whose record indicated more than one race were classified as "other." Beginning with 2009, these beneficiaries are classified as persons of unknown race.

Totals do not necessarily equal the sum of rounded components.

- Includes 387,781 persons of unknown race.
- Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.
- Fewer than 500.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A7—Number and average monthly benefit for women, by type of benefit, basis of entitlement, and race, December 2009

Type of benefit and basis of entitlement	All races ^a		White		Black		Other ^b	
	Number (thousands)	Average monthly benefit (dollars)	Number (thousands)	Average monthly benefit (dollars)	Number (thousands)	Average monthly benefit (dollars)	Number (thousands)	Average monthly benefit (dollars)
All women								
Total ^c	26,983	972.40	22,803	991.50	2,772	912.40	1,262	767.10
Workers	20,134	995.60	16,870	1,011.70	2,233	944.40	925	833.20
Retired	16,447	1,011.40	14,217	1,025.40	1,505	960.50	654	836.80
Full benefit	3,881	1,162.50	3,201	1,191.40	474	1,052.30	188	965.50
Reduced benefit	12,566	964.70	11,016	977.10	1,031	918.30	466	784.90
Disabled	3,688	925.20	2,653	938.70	728	911.00	271	824.60
Wives of retired and disabled workers	2,444	561.20	2,138	583.60	119	456.80	171	362.30
Entitlement based on care of children	114	324.90	81	350.60	14	282.60	16	235.70
Husband retired	41	500.80	31	533.80	5	441.90	5	351.30
Husband disabled	72	223.70	50	236.10	10	206.40	11	183.30
Entitlement based on age	2,331	572.70	2,056	592.80	105	480.70	154	375.60
Husband retired	2,251	580.70	1,989	601.10	99	490.10	149	377.10
Full benefit	381	689.30	316	738.60	21	560.90	41	387.80
Reduced benefit	1,869	558.50	1,673	575.00	78	471.10	108	373.00
Husband disabled	80	347.10	67	349.30	6	335.90	5	331.00
Widows	4,405	1,094.40	3,795	1,131.40	420	871.70	166	814.80
Entitlement based on care of children	149	850.60	104	908.90	21	716.50	21	684.70
Nondisabled, aged 60 or older	4,030	1,125.90	3,527	1,157.20	354	913.90	131	855.70
Disabled, aged 50 to FRA	226	691.50	164	718.20	45	610.30	14	625.40
Women aged 65 or older								
Total ^c	20,734	999.20	18,086	1,015.70	1,791	931.70	781	784.80
Entitled as worker	15,019	1,026.50	13,028	1,040.10	1,392	967.00	548	865.30
Worker only	8,909	1,003.10	7,405	1,020.80	1,038	946.10	431	848.80
Dually entitled	6,110	1,060.50	5,623	1,065.50	354	1,028.30	116	926.60
Wife's benefit	2,493	710.30	2,351	714.10	81	643.80	53	648.40
Widow's benefit	3,617	1,301.90	3,272	1,318.10	273	1,142.10	64	1,158.10
Entitled as wife or widow only	5,714	927.70	5,058	952.90	399	808.70	234	596.20
Wife's benefit	2,082	583.70	1,851	602.70	92	492.10	129	383.00
Widow's benefit	3,632	1,124.90	3,208	1,155.00	307	903.20	105	856.40

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

Through 2008, beneficiaries whose record indicated more than one race were classified as "other." Beginning with 2009, these beneficiaries are classified as persons of unknown race.

Totals do not necessarily equal the sum of rounded components.

FRA = full retirement age.

- Includes 146,068 persons of unknown race.
- Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.
- Excludes parents and disabled adult children receiving benefits because of a childhood disability.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A8—Number, average primary insurance amount, and average monthly benefit for persons with benefits based on special minimum primary insurance amount, by type of benefit and sex, December 2009

Type of benefit and sex	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)
All beneficiaries	82,337	642.00	825.30
Retirement benefits			
Total	76,036	636.60	846.10
Retired workers	73,869	637.60	863.60
Men	16,027	599.10	533.20
Women	57,842	648.20	955.20
Wives and husbands of retired workers	1,935	601.50	245.40
Children of retired workers	232	635.80	259.00
Disability benefits			
Total	26	613.40	536.10
Survivor benefits			
Total	6,275	706.80	574.20
Nondisabled widow(er)s	5,002	704.40	593.50
Disabled widow(er)s	82	705.90	432.80
Widowed mothers and fathers	12	693.10	478.20
Children of deceased workers	1,179	717.40	503.40

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

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5.A OASDI Current-Pay Benefits: Summary

Table 5.A10—Number and average monthly benefit for beneficiaries aged 60 or older, by sex, type of benefit, and age, December 2009

Type of benefit	Total, 60 or older	60–61	62–64	65–69	70–74	75–79	80–84	85–89	90–99	100 or older
Number (thousands)										
<i>All beneficiaries</i>										
Total	42,548	991	4,963	10,743	8,631	6,808	5,304	3,364	1,696	49
Retired workers	33,514	...	3,134	9,093	7,503	5,667	4,239	2,584	1,261	33
Widow(er)s, parents, and mothers and fathers	4,226	176	383	642	538	661	754	648	408	16
Wives and husbands	2,397	4	257	640	569	467	304	129	27	^a
Disabled workers	2,282	787	1,159	336	...	...	...	...	...	...
Disabled adult children	129	24	30	33	20	12	7	3	1	^a
<i>Men</i>										
Subtotal	18,483	448	2,223	5,037	4,010	3,000	2,125	1,175	460	7
Retired workers	17,067	...	1,555	4,806	3,981	2,979	2,112	1,169	457	7
Widowers, parents, and fathers	65	13	21	17	4	3	3	2	1	^a
Husbands	56	^a	3	14	15	12	7	3	1	^a
Disabled workers	1,233	423	628	183	...	...	...	...	...	...
Disabled adult children	62	12	15	16	9	5	3	1	^a	^a
<i>Women</i>										
Subtotal	24,064	543	2,740	5,706	4,621	3,808	3,180	2,189	1,236	42
Retired workers	16,447	...	1,579	4,286	3,522	2,688	2,127	1,415	803	26
Widows, parents, and mothers	4,161	163	362	624	534	658	751	646	406	16
Wives	2,341	4	254	625	554	455	297	126	26	^a
Disabled workers	1,049	364	531	154	...	...	...	...	...	...
Disabled adult children	67	11	15	17	11	7	4	2	1	^a
Average monthly benefit (dollars)										
<i>All beneficiaries</i>										
Total	1,125.80	1,135.30	1,039.40	1,176.90	1,140.80	1,092.60	1,107.80	1,112.00	1,190.90	1,071.90
Retired workers	1,164.30	...	1,025.40	1,218.90	1,186.60	1,135.10	1,148.10	1,139.70	1,221.70	1,102.00
Widow(er)s, parents, and mothers and fathers	1,110.10	972.60	1,047.10	1,184.00	1,114.30	1,103.80	1,102.30	1,110.80	1,134.30	1,012.50
Wives and husbands	567.10	501.20	479.00	583.80	577.80	572.40	571.70	574.00	619.40	^a
Disabled workers	1,199.40	1,187.50	1,207.40	1,199.60	...	...	...	...	...	...
Disabled adult children	706.80	727.00	726.70	735.90	696.80	648.70	612.00	587.30	550.00	^a
<i>Men</i>										
Subtotal	1,310.60	1,328.40	1,244.50	1,398.10	1,339.60	1,256.70	1,253.40	1,199.70	1,304.20	1,198.40
Retired workers	1,311.70	...	1,190.80	1,403.90	1,345.40	1,262.00	1,258.10	1,203.40	1,308.50	1,204.40
Widowers, parents, and fathers	928.10	792.70	962.20	1,110.30	891.10	779.40	720.10	675.60	668.00	^a
Husbands	340.80	^a	277.20	391.60	341.10	323.70	314.20	307.90	319.60	^a
Disabled workers	1,391.30	1,362.80	1,405.00	1,410.20	...	...	...	...	...	...
Disabled adult children	702.40	721.70	713.70	728.30	689.10	641.50	605.00	584.50	^a	^a
<i>Women</i>										
Subtotal	983.80	975.80	873.10	981.60	968.30	963.30	1,010.60	1,064.90	1,148.70	1,050.50
Retired workers	1,011.40	...	862.40	1,011.40	1,007.20	994.40	1,038.80	1,087.00	1,172.30	1,074.40
Widows, parents, and mothers	1,113.00	986.70	1,052.10	1,186.10	1,116.10	1,105.50	1,103.80	1,112.10	1,135.80	1,013.80
Wives	572.50	504.50	481.60	588.10	584.20	578.80	578.00	580.80	630.80	^a
Disabled workers	973.90	984.00	974.00	949.50	...	...	...	...	...	...
Disabled adult children	710.80	732.80	740.20	743.20	703.80	653.90	616.30	588.60	553.00	^a

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Fewer than 500 beneficiaries.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A14—Number and percentage distribution of women aged 62 or older, by basis of entitlement, type of benefit, and dual entitlement status, December 1960–2009, selected years

Entitlement	1960	1970	1975	1980	1985	1990	1995	2000	2005	2009
<i>Number (thousands)</i>										
All women 62 or older ^a	6,619	11,374	14,010	16,350	18,412	19,954	20,888	21,381	22,066	23,466
Entitled as worker ^b	2,866	5,753	7,586	9,304	10,805	12,037	12,974	14,013	15,291	17,131
Worker only	2,563	4,786	5,926	6,710	7,096	7,359	7,554	8,117	9,126	10,584
Dually entitled ^c	303	967	1,660	2,594	3,709	4,678	5,420	5,896	6,165	6,442
Wife's benefit	159	388	617	1,016	1,594	2,077	2,398	2,568	2,650	2,823
Widow's benefit	141	574	1,039	1,575	2,112	2,600	3,022	3,327	3,514	3,619
Entitled as wife or widow only ^c	3,753	5,621	6,424	7,046	7,607	7,917	7,914	7,368	6,775	6,334
Wife's benefit	2,174	2,546	2,745	2,884	3,018	3,059	2,985	2,768	2,511	2,337
Widow's benefit ^d	1,546	3,048	3,659	4,148	4,580	4,853	4,926	4,598	4,264	3,996
<i>Percentage distribution</i>										
All women 62 or older ^a	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Entitled as worker ^b	43.3	50.6	54.1	56.9	58.7	60.3	62.1	65.5	69.3	73.0
Worker only	38.7	42.1	42.3	41.0	38.5	36.9	36.2	38.0	41.4	45.1
Dually entitled ^c	4.6	8.5	11.8	15.9	20.1	23.4	25.9	27.6	28.0	27.5
Wife's benefit	2.4	3.4	4.4	6.2	8.7	10.4	11.5	12.0	12.0	12.0
Widow's benefit	2.1	5.0	7.4	9.6	11.5	13.0	14.4	15.6	16.0	15.4
Entitled as wife or widow only ^c	56.7	49.4	45.9	43.1	41.3	39.7	37.9	34.5	30.7	27.0
Wife's benefit	32.8	22.4	19.6	17.6	16.4	15.3	14.3	12.9	11.4	10.0
Widow's benefit ^d	23.4	26.8	26.1	25.4	24.9	24.3	23.6	21.5	19.3	17.0

SOURCE: Social Security Administration, Master Beneficiary Record. All data for 2005 and dual entitlement data for 1995 and 2000 are based on a 10 percent sample. All other years are 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

- a. Excludes disabled adult children.
- b. Includes disabled workers.
- c. Includes parents. Excludes dually entitled disabled workers.
- d. Includes disabled widows and mothers.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

Table 5.A15—Number and average monthly benefit for women aged 65 or older, by basis of entitlement, type of benefit, and dual entitlement status, December 2009

Entitlement	Total, 65 or older	65–69	70–74	75–79	80–84	85–89	90 or older
<i>Number</i>							
All women 65 or older	20,736,858	5,687,758	4,609,861	3,800,528	3,175,070	2,186,744	1,276,897
Entitled as worker ^a	15,021,785	4,439,783	3,521,923	2,687,985	2,127,406	1,415,294	829,394
Worker only	8,909,018	3,233,979	2,305,047	1,478,832	984,581	556,650	349,929
Dually entitled ^b	6,110,657	1,204,742	1,216,463	1,208,909	1,142,632	858,532	479,379
Wife's benefit	2,493,770	898,450	685,168	484,621	289,463	114,742	21,326
Widow's benefit	3,616,887	306,292	531,295	724,288	853,169	743,790	458,053
Entitled as wife or widow only	5,715,073	1,247,975	1,087,938	1,112,543	1,047,664	771,450	447,503
Wife's benefit	2,082,669	625,282	554,341	454,852	296,826	125,675	25,693
Widow's benefit	3,632,404	622,693	533,597	657,691	750,838	645,775	421,810
<i>Average monthly benefit (dollars)</i>							
All women 65 or older	999.20	982.40	968.90	963.90	1,011.10	1,065.40	1,145.90
Entitled as worker ^a	1,026.40	1,009.20	1,007.20	994.40	1,038.80	1,087.00	1,169.20
Worker only	1,003.10	1,046.50	1,014.20	947.20	942.00	930.70	1,052.60
Dually entitled ^b	1,060.50	909.20	993.90	1,052.10	1,122.30	1,188.40	1,254.40
Wife's benefit	710.30	749.10	716.80	677.50	657.50	645.40	685.70
Widow's benefit	1,301.90	1,379.00	1,351.20	1,302.70	1,280.00	1,272.10	1,280.80
Entitled as wife or widow only	927.70	886.80	845.10	890.20	954.90	1,025.60	1,102.60
Wife's benefit	583.70	588.10	584.20	578.80	578.00	580.80	630.70
Widow's benefit	1,124.90	1,186.80	1,116.20	1,105.60	1,103.90	1,112.20	1,131.40

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

- a. Includes disabled workers
- b. Excludes parents and disabled adult children.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A16—Number and average monthly benefit for adult beneficiaries, by sex, type of benefit, and age, December 2009

Type of benefit	Number (thousands)				Average monthly benefit (dollars)			
	All ages	Under 62	62–64	65 or older	All ages	Under 62	62–64	65 or older
All adult beneficiaries								
Total ^a	48,292	6,841	4,933	36,518	1,109.80	1,007.70	1,041.30	1,138.20
Retired workers	33,514	...	3,134	30,380	1,164.30	...	1,025.40	1,178.70
Disabled workers	7,788	6,293	1,159	336	1,064.30	1,030.70	1,207.40	1,199.60
Wives and husbands of retired workers	2,344	36	210	2,097	574.20	491.50	512.30	581.80
Wives and husbands of disabled workers	158	73	47	38	286.50	220.90	330.60	357.90
Nondisabled widow(er)s	4,090	128	315	3,647	1,123.50	1,074.70	1,121.20	1,125.40
Disabled widow(er)s	236	157	63	16	682.70	680.80	686.40	686.00
Mothers and fathers	160	154	4	2	841.60	839.00	918.40	874.70
Men								
Subtotal	21,308	3,322	2,207	15,778	1,283.80	1,131.60	1,248.20	1,320.80
Retired workers	17,067	...	1,555	15,512	1,311.70	...	1,190.80	1,323.80
Disabled workers	4,100	3,290	628	183	1,189.40	1,136.00	1,405.00	1,410.20
Husbands of retired workers	51	^b	2	49	347.80	461.50	310.50	349.30
Husbands of disabled workers	6	2	1	3	234.60	178.60	216.60	273.50
Nondisabled widowers	60	10	19	31	961.50	855.50	1,013.10	965.70
Disabled widowers	11	8	2	^b	497.30	493.30	512.00	504.70
Fathers	11	11	^b	^b	724.10	722.40	814.50	926.70
Women								
Subtotal	26,985	3,519	2,726	20,740	972.40	890.70	873.90	999.20
Retired workers	16,447	...	1,579	14,868	1,011.40	...	862.40	1,027.20
Disabled workers	3,688	3,003	531	154	925.20	915.30	974.00	949.50
Wives of retired workers	2,292	36	208	2,048	579.30	491.50	514.30	587.40
Wives of disabled workers	152	71	46	35	288.60	222.00	333.40	365.40
Nondisabled widows	4,030	117	297	3,617	1,125.90	1,094.00	1,128.10	1,126.80
Disabled widows	226	149	61	16	691.50	691.30	692.30	690.00
Mothers	149	143	4	2	850.60	848.20	922.20	874.00

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Includes parents. Excludes student beneficiaries aged 18–19 and disabled adult children.

b. Fewer than 500 beneficiaries.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A17—Number and average monthly benefit for disabled beneficiaries, by type of benefit, December 1957–2009

Year	Number				Average monthly benefit (dollars)		
	All disabled beneficiaries	Workers	Disabled adult children	Widow(er)s	Workers	Disabled adult children	Widow(er)s
1957	178,719	149,850	28,869	...	72.76	38.62	...
1958	284,744	237,719	47,025	...	82.10	39.62	...
1959	416,896	334,443	82,453	...	89.00	42.96	...
1960	559,425	455,371	104,054	...	89.31	44.15	...
1961	742,296	618,075	124,221	...	89.59	45.28	...
1962	888,131	740,867	147,264	...	89.99	45.67	...
1963	993,656	827,014	166,642	...	90.59	46.45	...
1964	1,077,695	894,173	183,522	...	91.12	47.35	...
1965	1,186,464	988,074	198,390	...	97.76	51.77	...
1966	1,310,911	1,097,190	213,721	...	98.09	52.42	...
1967	1,422,778	1,193,120	229,658	...	98.43	53.41	...
1968	1,560,517	1,295,300	243,654	21,563	111.86	61.83	72.25
1969	1,690,982	1,394,291	257,222	39,469	112.74	62.79	71.02
1970	1,812,786	1,492,948	270,557	49,281	131.26	73.21	82.00
1971	1,990,098	1,647,684	285,671	56,743	146.52	81.37	90.11
1972	2,202,090	1,832,916	305,007	64,167	179.32	98.81	109.54
1973	2,415,383	2,016,626	319,988	78,769	183.00	100.14	111.14
1974	2,670,092	2,236,882	341,082	92,128	205.70	112.45	125.87
1975	2,960,620	2,488,774	362,335	109,511	225.90	122.80	137.70
1976	3,171,198	2,670,208	381,563	119,427	245.17	132.32	147.01
1977	3,368,954	2,837,432	404,246	127,276	265.30	142.12	156.11
1978	3,429,421	2,879,774	419,896	129,751	288.30	153.66	165.46
1979	3,435,761	2,870,590	435,338	129,833	322.00	171.55	180.52
1980	3,436,429	2,858,680	450,169	127,580	370.70	198.95	205.02
1981	3,361,130	2,776,519	463,021	121,590	413.20	224.51	226.58
1982	3,192,379	2,603,599	472,408	116,372	440.60	245.07	242.11
1983	3,168,992	2,569,029	488,372	111,591	456.20	257.78	250.33
1984	3,212,040	2,596,516	506,373	109,151	470.70	270.28	306.24
1985	3,289,485	2,656,638	525,842	107,005	483.80	281.92	315.26
1986	3,380,480	2,728,463	545,043	106,974	487.90	288.79	319.74
1987	3,453,414	2,785,859	561,273	106,282	508.20	304.32	333.89
1988	3,507,707	2,830,284	574,300	103,123	529.50	320.21	348.05
1989	3,583,451	2,895,364	586,457	101,630	556.00	339.47	366.72
1990	3,712,763	3,011,294	600,480	100,989	587.20	361.71	388.93
1991	3,925,472	3,194,938	616,045	114,489	609.40	378.86	406.96
1992	4,236,080	3,467,783	636,973	131,324	626.10	393.61	422.65
1993	4,529,466	3,725,966	656,485	147,015	641.70	407.20	434.20
1994	4,796,313	3,962,954	672,683	160,676	661.40	422.40	446.30
1995	5,044,388	4,185,263	686,101	173,024	681.80	437.30	458.30
1996	5,264,321	4,385,623	696,787	181,911	703.90	454.30	471.00
1997	5,400,781	4,508,134	704,709	187,938	721.60	468.60	480.40
1998	5,605,272	4,698,319	712,772	194,181	733.10	479.40	487.30
1999	5,798,776	4,879,455	720,526	198,795	754.10	495.60	499.90
2000	5,972,450	5,042,334	728,689	201,427	786.40	518.30	519.70
2001	6,214,972	5,274,183	736,546	204,243	814.50	537.60	536.70
2002	6,495,868	5,543,981	744,529	207,358	834.30	550.40	548.10
2003	6,835,846	5,873,673	752,814	209,359	861.60	567.00	563.80
2004	7,168,270	6,198,271	759,264	210,735	894.10	587.60	582.70
2005	7,500,525	6,518,989	768,535	213,001	938.00	616.30	609.40
2006	7,803,692	6,806,918	776,596	220,178	977.70	642.40	630.70
2007	8,118,382	7,098,723	794,677	224,982	1,004.00	660.30	645.50
2008	8,528,164	7,426,691	871,466	230,007	1,063.10	681.70	683.60
2009	8,945,376	7,788,013	920,883	236,480	1,064.30	676.30	682.70

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: ... = not applicable.

CONTACT: Boris Shargorodsky (410) 965-2832 or supplement@ssa.gov.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B1—Number, average primary insurance amount, and average monthly benefit without reduction for early retirement and with delayed retirement credit, by age and sex, December 2009

Age	All retired workers			Men			Women		
	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)
Total	3,069,943	1,340.70	1,484.30	1,731,056	1,519.20	1,634.80	1,338,887	1,110.00	1,289.80
66–69	170,420	1,398.60	1,500.90	90,710	1,573.60	1,669.40	79,710	1,199.60	1,309.20
66	2,987	1,547.00	1,580.60	1,671	1,752.50	1,781.00	1,316	1,286.10	1,326.20
67	49,266	1,459.70	1,523.10	27,032	1,639.50	1,699.50	22,234	1,241.20	1,308.70
68	58,086	1,406.90	1,515.70	31,081	1,578.30	1,682.00	27,005	1,209.60	1,324.20
69	60,081	1,333.20	1,464.50	30,926	1,501.50	1,624.30	29,155	1,154.70	1,294.90
70–74	333,332	1,149.80	1,337.50	135,774	1,298.30	1,444.50	197,558	1,047.70	1,264.00
70	73,743	1,259.60	1,459.40	32,282	1,435.20	1,609.40	41,461	1,122.90	1,342.60
71	71,100	1,195.80	1,388.10	29,031	1,361.10	1,518.40	42,069	1,081.70	1,298.10
72	67,616	1,133.10	1,326.60	26,641	1,277.80	1,426.70	40,975	1,038.90	1,261.50
73	60,702	1,076.50	1,253.90	23,962	1,189.50	1,313.50	36,740	1,002.70	1,215.10
74	60,171	1,053.50	1,225.10	23,858	1,168.50	1,282.80	36,313	977.90	1,187.20
75–79	1,000,176	1,372.20	1,501.40	599,797	1,548.00	1,658.80	400,379	1,108.90	1,265.60
75	216,093	1,392.10	1,474.80	131,121	1,559.10	1,612.00	84,972	1,134.40	1,263.10
76	204,573	1,375.40	1,494.10	122,874	1,548.80	1,645.60	81,699	1,114.50	1,266.10
77	198,796	1,388.00	1,523.90	118,471	1,568.10	1,689.30	80,325	1,122.40	1,279.90
78	192,707	1,356.70	1,513.00	115,095	1,535.10	1,679.80	77,612	1,092.30	1,265.60
79	188,007	1,345.20	1,504.20	112,236	1,526.40	1,674.20	75,771	1,076.80	1,252.50
80–84	781,627	1,352.80	1,507.00	461,628	1,533.80	1,666.20	319,999	1,091.80	1,277.40
80	175,046	1,331.40	1,497.20	103,702	1,511.70	1,663.00	71,344	1,069.30	1,256.20
81	168,081	1,354.40	1,508.00	98,654	1,541.70	1,677.10	69,427	1,088.20	1,267.60
82	159,377	1,365.90	1,521.10	94,444	1,547.60	1,680.90	64,933	1,101.50	1,288.60
83	150,578	1,347.60	1,490.50	89,188	1,523.00	1,636.70	61,390	1,092.80	1,278.00
84	128,545	1,369.90	1,521.00	75,640	1,549.20	1,672.50	52,905	1,113.60	1,304.40
85–89	516,584	1,300.90	1,450.20	302,935	1,462.70	1,568.10	213,649	1,071.40	1,283.00
85	130,071	1,333.20	1,472.40	76,797	1,503.50	1,605.60	53,274	1,087.60	1,280.30
86	115,294	1,308.50	1,454.80	68,175	1,471.10	1,576.50	47,119	1,073.30	1,278.60
87	101,159	1,292.40	1,443.80	59,137	1,452.70	1,559.60	42,022	1,066.90	1,280.80
88	92,005	1,284.70	1,440.40	53,727	1,442.30	1,549.10	38,278	1,063.40	1,287.70
89	78,055	1,265.70	1,426.20	45,099	1,418.10	1,524.90	32,956	1,057.20	1,291.00
90 or older	267,804	1,465.50	1,592.10	140,212	1,648.50	1,734.50	127,592	1,264.30	1,435.60

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B2—Number, average primary insurance amount, and average monthly benefit without reduction for early retirement and without delayed retirement credit, by age and sex, December 2009

Age	All retired workers			Men			Women		
	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)
Total	5,695,123	1,250.90	1,310.10	3,153,664	1,481.60	1,483.10	2,541,459	964.70	1,095.60
66-69	2,039,215	1,412.80	1,446.50	1,187,692	1,634.10	1,634.80	851,523	1,104.00	1,184.00
66	593,358	1,414.90	1,444.60	344,329	1,627.10	1,627.50	249,029	1,121.60	1,191.80
67	542,230	1,419.40	1,452.70	318,523	1,638.90	1,639.50	223,707	1,106.80	1,186.70
68	469,260	1,413.60	1,449.50	272,716	1,642.60	1,643.30	196,544	1,095.80	1,180.60
69	434,367	1,400.70	1,438.30	252,124	1,628.60	1,629.40	182,243	1,085.50	1,173.90
70-74	1,919,055	1,311.60	1,356.00	1,126,199	1,522.70	1,523.90	792,856	1,011.80	1,117.40
70	402,422	1,365.40	1,405.30	234,110	1,586.50	1,587.40	168,312	1,058.00	1,152.10
71	391,331	1,343.70	1,386.60	227,853	1,563.90	1,565.10	163,478	1,036.60	1,137.70
72	383,975	1,312.80	1,357.20	225,338	1,526.90	1,528.10	158,637	1,008.80	1,114.30
73	368,842	1,273.80	1,320.60	218,068	1,476.60	1,477.90	150,774	980.40	1,093.10
74	372,485	1,256.20	1,304.30	220,830	1,454.00	1,455.40	151,655	968.10	1,084.40
75-79	835,755	1,019.30	1,102.00	427,302	1,225.30	1,227.80	408,453	803.90	970.50
75	207,768	1,041.00	1,117.00	107,313	1,245.90	1,248.20	100,455	822.10	976.90
76	176,782	1,026.30	1,104.70	91,223	1,229.70	1,232.00	85,559	809.50	969.00
77	164,972	1,021.80	1,103.00	83,971	1,227.80	1,230.30	81,001	808.30	971.00
78	147,961	1,003.60	1,092.40	75,078	1,210.90	1,213.30	72,883	790.00	967.80
79	138,272	991.80	1,085.30	69,717	1,200.40	1,203.30	68,555	779.70	965.30
80-84	504,029	983.20	1,093.50	248,678	1,206.70	1,209.80	255,351	765.60	980.20
80	120,908	977.50	1,079.50	60,256	1,193.20	1,196.20	60,652	763.10	963.50
81	113,198	990.70	1,093.60	55,614	1,212.80	1,215.90	57,584	776.30	975.50
82	99,389	988.10	1,099.60	49,583	1,215.40	1,218.30	49,806	761.70	981.30
83	89,005	972.50	1,091.10	44,039	1,198.50	1,201.40	44,966	751.20	983.10
84	81,529	987.20	1,109.20	39,186	1,217.30	1,220.60	42,343	774.30	1,006.10
85-89	264,138	933.30	1,078.80	117,154	1,158.70	1,162.80	146,984	753.60	1,011.90
85	69,848	949.40	1,083.50	32,245	1,179.20	1,182.50	37,603	752.30	998.50
86	59,678	932.80	1,072.90	26,932	1,158.00	1,161.90	32,746	747.70	999.70
87	51,932	929.20	1,077.90	22,923	1,152.10	1,156.00	29,009	753.00	1,016.20
88	45,302	929.20	1,084.10	19,513	1,153.30	1,158.20	25,789	759.60	1,028.00
89	37,378	914.60	1,074.50	15,541	1,134.20	1,139.40	21,837	758.30	1,028.40
90 or older	132,931	994.20	1,145.40	46,639	1,228.50	1,234.10	86,292	867.60	1,097.40

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B3—Number and average monthly benefit before and after delayed retirement credit, by age and sex, December 2009

Age	All retired workers			Men			Women		
	Number	Average monthly benefit (dollars)		Number	Average monthly benefit (dollars)		Number	Average monthly benefit (dollars)	
		Before delayed retirement credit	After delayed retirement credit		Before delayed retirement credit	After delayed retirement credit		Before delayed retirement credit	After delayed retirement credit
Total	3,465,258	1,350.60	1,454.70	1,906,248	1,498.70	1,606.70	1,559,010	1,169.60	1,269.00
66–69	172,463	1,405.00	1,497.50	90,894	1,572.70	1,668.70	81,569	1,218.20	1,306.60
66	3,030	1,549.30	1,578.30	1,678	1,749.30	1,779.90	1,352	1,301.10	1,328.00
67	49,622	1,466.10	1,521.40	27,076	1,638.30	1,699.40	22,546	1,259.20	1,307.70
68	58,641	1,413.80	1,512.40	31,140	1,577.60	1,681.40	27,501	1,228.40	1,321.10
69	61,170	1,339.90	1,459.70	31,000	1,500.80	1,623.10	30,170	1,174.50	1,291.70
70–74	349,033	1,154.20	1,328.60	136,340	1,298.10	1,442.70	212,693	1,062.00	1,255.40
70	75,878	1,263.10	1,451.50	32,396	1,434.80	1,607.90	43,482	1,135.20	1,335.00
71	73,924	1,199.30	1,379.60	29,147	1,360.70	1,516.70	44,777	1,094.20	1,290.40
72	71,074	1,137.10	1,317.80	26,756	1,277.30	1,424.80	44,318	1,052.50	1,253.20
73	64,177	1,084.20	1,246.70	24,061	1,189.60	1,311.70	40,116	1,020.90	1,207.60
74	63,980	1,062.20	1,218.00	23,980	1,169.40	1,281.10	40,000	998.00	1,180.20
75–79	1,109,489	1,374.90	1,476.70	655,980	1,529.40	1,634.10	453,509	1,151.50	1,249.00
75	224,882	1,400.10	1,465.40	134,304	1,555.20	1,607.20	90,578	1,170.10	1,255.30
76	224,604	1,378.60	1,473.20	133,012	1,533.90	1,625.60	91,592	1,153.10	1,251.90
77	223,537	1,387.70	1,495.40	131,389	1,547.00	1,660.20	92,148	1,160.50	1,260.40
78	219,945	1,357.70	1,480.00	129,613	1,509.70	1,643.50	90,332	1,139.60	1,245.30
79	216,521	1,349.20	1,469.10	127,662	1,499.20	1,634.70	88,859	1,133.70	1,231.20
80–84	909,103	1,359.80	1,467.50	523,518	1,506.10	1,627.20	385,585	1,161.10	1,250.60
80	203,141	1,338.40	1,459.90	118,722	1,483.00	1,620.70	84,419	1,135.10	1,233.90
81	193,671	1,362.70	1,472.50	111,855	1,514.50	1,638.40	81,816	1,155.20	1,245.70
82	185,069	1,370.50	1,479.80	106,514	1,520.60	1,643.00	78,555	1,167.00	1,258.50
83	173,632	1,358.30	1,452.40	99,624	1,497.80	1,602.80	74,008	1,170.40	1,249.90
84	153,590	1,373.10	1,473.20	86,803	1,518.50	1,630.20	66,787	1,184.20	1,269.20
85–89	604,394	1,323.80	1,410.00	341,596	1,433.70	1,530.20	262,798	1,181.00	1,253.80
85	150,964	1,349.00	1,432.90	86,009	1,476.10	1,570.10	64,955	1,180.60	1,251.20
86	134,424	1,328.40	1,414.40	76,839	1,442.30	1,538.70	57,585	1,176.40	1,248.70
87	118,827	1,316.10	1,403.20	66,982	1,423.20	1,520.60	51,845	1,177.70	1,251.50
88	108,322	1,311.60	1,399.00	60,826	1,411.40	1,509.20	47,496	1,183.70	1,257.90
89	91,857	1,300.30	1,387.60	50,940	1,389.60	1,487.70	40,917	1,189.10	1,263.10
90 or older	320,776	1,475.50	1,541.40	157,920	1,617.80	1,696.00	162,856	1,337.60	1,391.50

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B4—Number, percentage, and average monthly benefit, by year of entitlement as retired worker and sex, December 2009

Year of entitlement	All retired workers				Men				Women			
	Number	Percent-age distribu-tion	Cumula-tive percent-age ^a	Average monthly benefit (dollars)	Number	Percent-age distribu-tion	Cumula-tive percent-age ^a	Average monthly benefit (dollars)	Number	Percent-age distribu-tion	Cumula-tive percent-age ^a	Average monthly benefit (dollars)
Total	33,514,013	100.0	...	1,164.30	17,067,434	100.0	...	1,311.70	16,446,579	100.0	...	1,011.40
<i>Summary data</i>												
2005–2009	10,149,234	30.3	...	1,197.80	5,293,516	31.0	...	1,378.40	4,855,718	29.5	...	1,001.00
2000–2004	7,811,183	23.3	...	1,191.70	4,149,015	24.3	...	1,363.30	3,662,168	22.3	...	997.20
1995–1999	5,976,678	17.8	...	1,128.40	3,125,962	18.3	...	1,268.40	2,850,716	17.3	...	974.90
1990–1994	4,616,584	13.8	...	1,128.40	2,383,435	14.0	...	1,240.60	2,233,149	13.6	...	1,008.70
1985–1989	3,033,387	9.1	...	1,115.30	1,412,172	8.3	...	1,187.80	1,621,215	9.9	...	1,052.20
1980–1984	1,434,583	4.3	...	1,148.80	566,860	3.3	...	1,177.30	867,723	5.3	...	1,130.20
1975–1979	415,746	1.2	...	1,178.10	121,895	0.7	...	1,243.50	293,851	1.8	...	1,150.90
1970–1974	71,149	0.2	...	1,062.70	13,923	0.1	...	1,072.40	57,226	0.3	...	1,060.40
1965–1969	5,271	^b	...	967.50	637	^b	...	968.90	4,634	^b	...	967.30
Before 1965	198	^b	...	812.60	19	^b	...	673.90	179	^b	...	827.30
<i>Single-year data</i>												
2009	2,527,450	7.5	7.5	1,196.10	1,336,589	7.8	7.8	1,377.40	1,190,861	7.2	7.2	992.70
2008	2,139,711	6.4	13.9	1,205.50	1,113,514	6.5	14.4	1,388.80	1,026,197	6.2	13.5	1,006.50
2007	1,881,840	5.6	19.5	1,205.80	977,066	5.7	20.1	1,388.60	904,774	5.5	19.0	1,008.50
2006	1,804,719	5.4	24.9	1,198.20	934,460	5.5	25.6	1,379.50	870,259	5.3	24.3	1,003.50
2005	1,795,514	5.4	30.3	1,182.40	931,887	5.5	31.0	1,355.60	863,627	5.3	29.5	995.60
2004	1,674,419	5.0	35.3	1,190.20	873,877	5.1	36.1	1,368.40	800,542	4.9	34.4	995.80
2003	1,562,046	4.7	39.9	1,200.00	822,179	4.8	41.0	1,377.70	739,867	4.5	38.9	1,002.70
2002	1,544,571	4.6	44.5	1,198.00	821,558	4.8	45.8	1,370.80	723,013	4.4	43.3	1,001.70
2001	1,464,610	4.4	48.9	1,173.10	781,168	4.6	50.3	1,335.90	683,442	4.2	47.4	987.10
2000	1,565,537	4.7	53.6	1,196.00	850,233	5.0	55.3	1,362.20	715,304	4.3	51.8	998.50
1999	1,347,021	4.0	57.6	1,151.20	717,405	4.2	59.5	1,304.30	629,616	3.8	55.6	976.90
1998	1,228,264	3.7	61.3	1,124.10	643,036	3.8	63.3	1,268.40	585,228	3.6	59.2	965.60
1997	1,178,457	3.5	64.8	1,120.20	612,013	3.6	66.9	1,260.30	566,444	3.4	62.6	968.80
1996	1,152,672	3.4	68.2	1,119.20	587,253	3.4	70.3	1,250.90	565,419	3.4	66.1	982.30
1995	1,070,264	3.2	71.4	1,123.50	566,255	3.3	73.6	1,249.60	504,009	3.1	69.1	981.90
1994	1,029,185	3.1	74.5	1,126.90	540,662	3.2	76.8	1,250.40	488,523	3.0	72.1	990.20
1993	980,046	2.9	77.4	1,126.00	512,295	3.0	79.8	1,242.10	467,751	2.8	74.9	998.90
1992	942,761	2.8	80.2	1,128.20	489,747	2.9	82.7	1,239.10	453,014	2.8	77.7	1,008.40
1991	862,291	2.6	82.8	1,129.30	441,987	2.6	85.3	1,233.70	420,304	2.6	80.2	1,019.60
1990	802,301	2.4	85.2	1,132.50	398,744	2.3	87.6	1,235.00	403,557	2.5	82.7	1,031.30
1989	729,735	2.2	87.4	1,123.50	354,415	2.1	89.7	1,215.20	375,320	2.3	85.0	1,036.90
1988	662,665	2.0	89.4	1,114.20	313,595	1.8	91.5	1,195.40	349,070	2.1	87.1	1,041.40
1987	609,203	1.8	91.2	1,117.10	281,618	1.7	93.2	1,190.10	327,585	2.0	89.1	1,054.30
1986	557,293	1.7	92.8	1,111.30	253,437	1.5	94.7	1,170.20	303,856	1.8	90.9	1,062.20
1985	474,491	1.4	94.3	1,106.60	209,107	1.2	95.9	1,148.30	265,384	1.6	92.6	1,073.80
1984	396,260	1.2	95.4	1,107.90	167,419	1.0	96.9	1,136.60	228,841	1.4	94.0	1,087.00
1983	347,232	1.0	96.5	1,130.60	141,892	0.8	97.7	1,153.80	205,340	1.2	95.2	1,114.60
1982	283,770	0.8	97.3	1,148.90	111,152	0.7	98.3	1,168.40	172,618	1.0	96.2	1,136.30
1981	224,592	0.7	98.0	1,197.60	83,707	0.5	98.8	1,239.40	140,885	0.9	97.1	1,172.80
1980	182,729	0.5	98.5	1,211.60	62,690	0.4	99.2	1,272.10	120,039	0.7	97.8	1,180.00
1979	139,481	0.4	98.9	1,216.10	44,779	0.3	99.5	1,291.60	94,702	0.6	98.4	1,180.40
1978	102,658	0.3	99.3	1,192.10	30,531	0.2	99.6	1,257.00	72,127	0.4	98.9	1,164.60
1977	71,877	0.2	99.5	1,164.00	20,804	0.1	99.8	1,226.60	51,073	0.3	99.2	1,138.40
1976	59,988	0.2	99.6	1,131.80	15,547	0.1	99.9	1,171.80	44,441	0.3	99.4	1,117.80
1975	41,742	0.1	99.8	1,107.50	10,234	0.1	99.9	1,136.10	31,508	0.2	99.6	1,098.10

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B4—Number, percentage, and average monthly benefit, by year of entitlement as retired worker and sex, December 2009—Continued

Year of entitlement	All retired workers				Men				Women			
	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)
<i>Single-year data (cont.)</i>												
1974	28,903	0.1	99.9	1,085.90	6,342	b	100.0	1,099.50	22,561	0.1	99.8	1,082.10
1973	18,943	0.1	99.9	1,060.80	3,654	b	100.0	1,073.00	15,289	0.1	99.9	1,057.90
1972	11,664	b	99.9	1,049.50	2,023	b	100.0	1,058.30	9,641	0.1	99.9	1,047.60
1971	7,333	b	100.0	1,032.50	1,240	b	100.0	1,002.40	6,093	b	99.9	1,038.60
1970	4,306	b	100.0	1,003.30	664	b	100.0	983.00	3,642	b	100.0	1,007.00
1969	2,487	b	100.0	996.70	328	b	100.0	1,027.10	2,159	b	100.0	992.10
1968	1,433	b	100.0	965.00	199	b	100.0	933.20	1,234	b	100.0	970.10
1967	733	b	100.0	916.30	63	b	100.0	856.50	670	b	100.0	921.90
1966	429	b	100.0	924.20	32	b	100.0	903.10	397	b	100.0	925.90
1965	189	b	100.0	898.60	15	b	100.0	782.00	174	b	100.0	908.60

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

- a. Represents those entitled in specified year or later.
- b. Less than 0.05 percent.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B5—Number, average age, and percentage distribution, by sex and age, December 1940–2009, selected years

Year	Number (thousands)	Average age	Percentage distribution						
			Total, 62 or older	62–64	65–69	70–74	75–79	80–84	85 or older
<i>Men</i>									
1940	99	68.8	100.0	...	74.4	17.4	6.4	1.6	0.2
1945	447	71.7	100.0	...	39.9	40.2	15.1	4.0	0.7
1950	1,469	72.2	100.0	...	39.1	33.7	20.2	5.9	1.2
1955	3,252	72.7	100.0	...	35.7	34.8	20.0	7.6	1.9
1960	5,217	73.2	100.0	...	33.8	33.1	21.1	9.0	3.1
1965	6,825	72.9	100.0	6.9	29.7	29.5	19.9	9.9	4.1
1970	7,688	72.6	100.0	7.5	30.1	26.9	19.6	10.6	5.3
1975	9,163	72.3	100.0	9.3	32.2	25.6	17.1	10.1	5.7
1980	10,461	72.2	100.0	9.5	32.1	25.8	16.9	9.5	6.1
1985	11,817	72.3	100.0	10.9	30.2	25.9	17.3	9.6	6.1
1986	12,080	72.4	100.0	10.9	30.3	25.7	17.3	9.7	6.1
1987	12,295	72.4	100.0	10.9	30.2	25.5	17.4	9.9	6.1
1988	12,483	72.4	100.0	10.7	30.0	25.5	17.6	10.0	6.2
1989	12,718	72.5	100.0	10.5	30.1	25.2	17.8	10.1	6.3
1990	12,985	72.5	100.0	10.3	30.0	25.3	17.8	10.2	6.4
1991	13,227	72.6	100.0	10.2	29.5	25.7	17.9	10.3	6.4
1992	13,474	72.7	100.0	10.0	29.2	25.8	17.8	10.5	6.6
1993	13,649	72.8	100.0	9.9	28.9	25.9	17.9	10.7	6.8
1994	13,795	72.8	100.0	9.8	28.3	26.2	17.9	10.9	6.9
1995	13,915	72.9	100.0	9.5	28.0	26.1	18.3	11.1	7.0
1996	14,012	73.1	100.0	9.2	27.6	25.8	18.9	11.3	7.2
1997	14,126	73.2	100.0	9.0	27.2	25.8	19.2	11.4	7.4
1998	14,206	73.3	100.0	9.0	26.6	25.6	19.5	11.6	7.6
1999	14,329	73.3	100.0	9.1	26.4	25.2	19.8	11.7	7.8
2000	14,772	73.2	100.0	9.0	27.6	24.6	19.3	11.7	7.8
2001	14,930	73.3	100.0	8.9	27.6	24.3	19.1	12.1	7.9
2002	15,070	73.3	100.0	8.8	27.9	24.0	19.1	12.4	7.8
2003	15,254	73.3	100.0	8.7	27.9	23.5	19.0	12.6	8.2
2004	15,438	73.4	100.0	8.9	27.7	23.4	18.8	12.8	8.4
2005	15,654	73.4	100.0	9.1	27.4	23.2	18.7	12.8	8.7
2006	15,869	73.5	100.0	9.0	27.5	23.2	18.5	12.8	9.1
2007	16,112	73.5	100.0	8.5	27.8	23.3	18.3	12.8	9.3
2008	16,456	73.5	100.0	8.3	28.0	23.6	17.9	12.7	9.5
2009	17,067	73.4	100.0	9.1	28.2	23.3	17.5	12.4	9.6

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B5—Number, average age, and percentage distribution, by sex and age, December 1940–2009, selected years—Continued

Year	Number (thousands)	Average age	Percentage distribution						
			Total, 62 or older	62–64	65–69	70–74	75–79	80–84	85 or older
Women									
1940	13	68.1	100.0	...	82.6	12.8	3.9	0.6	^a
1945	71	70.8	100.0	...	47.1	40.0	10.2	2.3	0.3
1950	302	71.1	100.0	...	48.4	32.9	15.0	3.2	0.5
1955	1,222	71.3	100.0	...	47.8	32.3	14.6	4.4	0.8
1960	2,845	71.0	100.0	12.6	36.3	29.0	15.0	5.6	1.6
1965	4,276	71.8	100.0	12.2	31.6	28.1	17.6	7.7	2.8
1970	5,661	72.0	100.0	11.5	30.1	25.4	18.7	10.0	4.4
1975	7,424	72.2	100.0	11.8	30.4	24.2	16.9	10.6	6.1
1980	9,101	72.6	100.0	11.2	29.2	24.2	17.1	10.6	7.7
1985	10,615	73.3	100.0	11.0	26.9	23.9	17.9	11.4	8.8
1986	10,901	73.3	100.0	10.8	26.7	23.8	18.0	11.7	9.0
1987	11,145	73.4	100.0	10.7	26.4	23.6	18.1	11.9	9.3
1988	11,944	73.5	100.0	10.5	26.0	23.6	18.2	12.2	9.5
1989	11,608	73.6	100.0	10.2	26.1	23.1	18.4	12.4	9.8
1990	11,842	73.7	100.0	9.9	25.9	23.0	18.5	12.5	10.2
1991	12,048	73.9	100.0	9.5	25.4	23.2	18.6	12.7	10.5
1992	12,272	74.0	100.0	9.3	25.2	23.1	18.5	12.9	10.9
1993	12,447	74.1	100.0	9.0	24.9	23.0	18.6	13.1	11.3
1994	12,607	74.2	100.0	9.0	24.3	23.2	18.4	13.4	11.6
1995	12,757	74.3	100.0	8.8	24.0	23.2	18.5	13.5	11.9
1996	12,887	74.4	100.0	8.7	23.6	22.9	18.8	13.7	12.2
1997	13,155	74.5	100.0	8.6	23.2	23.0	19.0	13.8	12.5
1998	13,304	74.6	100.0	8.7	22.8	22.8	19.0	13.9	12.8
1999	13,453	74.6	100.0	8.8	22.8	22.3	19.3	13.8	13.0
2000	13,734	74.6	100.0	8.9	23.4	21.9	19.1	13.8	13.0
2001	13,912	74.6	100.0	8.9	23.6	21.6	18.8	13.9	13.1
2002	14,096	74.6	100.0	8.8	23.9	21.3	18.7	14.0	13.3
2003	14,294	74.5	100.0	8.8	24.3	21.0	18.5	14.0	13.4
2004	14,534	74.5	100.0	9.0	24.4	20.9	18.1	14.1	13.4
2005	14,821	74.5	100.0	9.4	24.4	20.8	17.8	14.1	13.5
2006	15,107	74.5	100.0	9.4	24.8	20.9	17.5	13.9	13.7
2007	15,416	74.5	100.0	9.0	25.3	21.1	17.2	13.7	13.8
2008	15,818	74.4	100.0	8.9	25.8	21.5	16.7	13.5	13.7
2009	16,447	74.2	100.0	9.6	26.1	21.4	16.3	12.9	13.6

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1988 and 1990–2005 are based on a 10 percent sample. All other years are 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Less than 0.05 percent.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B6—Number and percentage distribution with and without reduction for early retirement, by sex and monthly benefit, December 2009

Sex and monthly benefit (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	33,514,013	100.0	24,748,391	100.0	8,765,622	100.0
Less than 400.00	1,511,099	4.5	1,200,445	4.9	310,654	3.5
400.00–449.90	357,345	1.1	279,191	1.1	78,154	0.9
450.00–499.90	451,081	1.3	380,872	1.5	70,209	0.8
500.00–549.90	662,394	2.0	582,404	2.4	79,990	0.9
550.00–599.90	853,744	2.5	730,847	3.0	122,897	1.4
600.00–649.90	1,078,134	3.2	929,615	3.8	148,519	1.7
650.00–699.90	1,195,524	3.6	1,014,254	4.1	181,270	2.1
700.00–749.90	1,211,059	3.6	1,006,827	4.1	204,232	2.3
750.00–799.90	1,209,569	3.6	985,677	4.0	223,892	2.6
800.00–849.90	1,164,007	3.5	928,188	3.8	235,819	2.7
850.00–899.90	1,095,249	3.3	852,024	3.4	243,225	2.8
900.00–949.90	1,068,341	3.2	823,311	3.3	245,030	2.8
950.00–999.90	1,068,316	3.2	824,921	3.3	243,395	2.8
1,000.00–1,049.90	1,091,304	3.3	842,815	3.4	248,489	2.8
1,050.00–1,099.90	1,132,780	3.4	876,008	3.5	256,772	2.9
1,100.00–1,149.90	1,184,843	3.5	926,221	3.7	258,622	3.0
1,150.00–1,199.90	1,237,737	3.7	977,719	4.0	260,018	3.0
1,200.00–1,249.90	1,254,552	3.7	995,383	4.0	259,169	3.0
1,250.00–1,299.90	1,385,414	4.1	1,120,759	4.5	264,655	3.0
1,300.00–1,349.90	1,390,501	4.1	1,124,033	4.5	266,468	3.0
1,350.00–1,399.90	1,256,726	3.7	993,214	4.0	263,512	3.0
1,400.00–1,449.90	1,277,873	3.8	1,008,328	4.1	269,545	3.1
1,450.00–1,499.90	1,217,939	3.6	940,446	3.8	277,493	3.2
1,500.00–1,549.90	1,128,923	3.4	847,020	3.4	281,903	3.2
1,550.00–1,599.90	1,067,135	3.2	756,358	3.1	310,777	3.5
1,600.00–1,649.90	974,079	2.9	653,919	2.6	320,160	3.7
1,650.00–1,699.90	794,545	2.4	505,260	2.0	289,285	3.3
1,700.00–1,749.90	638,375	1.9	363,197	1.5	275,178	3.1
1,750.00–1,799.90	525,621	1.6	270,654	1.1	254,967	2.9
1,800.00–1,849.90	456,348	1.4	218,439	0.9	237,909	2.7
1,850.00–1,899.90	418,560	1.2	176,221	0.7	242,339	2.8
1,900.00–1,949.90	356,537	1.1	141,763	0.6	214,774	2.5
1,950.00–1,999.90	305,208	0.9	114,483	0.5	190,725	2.2
2,000.00 or more	1,493,151	4.5	357,575	1.4	1,135,576	13.0
Average benefit (dollars)	1,164.30		1,091.10		1,371.10	

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B6—Number and percentage distribution with and without reduction for early retirement, by sex and monthly benefit, December 2009—Continued

Sex and monthly benefit (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Men	17,067,434	100.0	12,182,366	100.0	4,885,068	100.0
Less than 400.00	721,688	4.2	564,510	4.6	157,178	3.2
400.00–449.90	143,257	0.8	107,616	0.9	35,641	0.7
450.00–499.90	163,241	1.0	132,268	1.1	30,973	0.6
500.00–549.90	214,624	1.3	181,987	1.5	32,637	0.7
550.00–599.90	247,484	1.5	200,748	1.6	46,736	1.0
600.00–649.90	267,942	1.6	213,651	1.8	54,291	1.1
650.00–699.90	283,199	1.7	220,783	1.8	62,416	1.3
700.00–749.90	297,670	1.7	231,909	1.9	65,761	1.3
750.00–799.90	314,293	1.8	245,976	2.0	68,317	1.4
800.00–849.90	331,797	1.9	261,349	2.1	70,448	1.4
850.00–899.90	354,104	2.1	280,475	2.3	73,629	1.5
900.00–949.90	381,053	2.2	304,500	2.5	76,553	1.6
950.00–999.90	413,407	2.4	333,825	2.7	79,582	1.6
1,000.00–1,049.90	454,055	2.7	368,503	3.0	85,552	1.8
1,050.00–1,099.90	501,902	2.9	410,852	3.4	91,050	1.9
1,100.00–1,149.90	565,965	3.3	469,836	3.9	96,129	2.0
1,150.00–1,199.90	626,114	3.7	523,367	4.3	102,747	2.1
1,200.00–1,249.90	670,466	3.9	561,246	4.6	109,220	2.2
1,250.00–1,299.90	812,655	4.8	695,290	5.7	117,365	2.4
1,300.00–1,349.90	843,261	4.9	718,400	5.9	124,861	2.6
1,350.00–1,399.90	781,433	4.6	648,153	5.3	133,280	2.7
1,400.00–1,449.90	829,416	4.9	681,264	5.6	148,152	3.0
1,450.00–1,499.90	815,963	4.8	651,543	5.3	164,420	3.4
1,500.00–1,549.90	779,364	4.6	602,345	4.9	177,019	3.6
1,550.00–1,599.90	752,810	4.4	545,331	4.5	207,479	4.2
1,600.00–1,649.90	701,000	4.1	478,852	3.9	222,148	4.5
1,650.00–1,699.90	583,105	3.4	377,247	3.1	205,858	4.2
1,700.00–1,749.90	463,404	2.7	261,622	2.1	201,782	4.1
1,750.00–1,799.90	380,595	2.2	190,330	1.6	190,265	3.9
1,800.00–1,849.90	333,792	2.0	153,908	1.3	179,884	3.7
1,850.00–1,899.90	312,237	1.8	126,046	1.0	186,191	3.8
1,900.00–1,949.90	271,265	1.6	103,241	0.8	168,024	3.4
1,950.00–1,999.90	236,669	1.4	84,899	0.7	151,770	3.1
2,000.00 or more	1,218,204	7.1	250,494	2.1	967,710	19.8
Average benefit (dollars)	1,311.70		1,221.40		1,536.80	

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B6—Number and percentage distribution with and without reduction for early retirement, by sex and monthly benefit, December 2009—Continued

Sex and monthly benefit (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	16,446,579	100.0	12,566,025	100.0	3,880,554	100.0
Less than 400.00	789,411	4.8	635,935	5.1	153,476	4.0
400.00–449.90	214,088	1.3	171,575	1.4	42,513	1.1
450.00–499.90	287,840	1.8	248,604	2.0	39,236	1.0
500.00–549.90	447,770	2.7	400,417	3.2	47,353	1.2
550.00–599.90	606,260	3.7	530,099	4.2	76,161	2.0
600.00–649.90	810,192	4.9	715,964	5.7	94,228	2.4
650.00–699.90	912,325	5.5	793,471	6.3	118,854	3.1
700.00–749.90	913,389	5.6	774,918	6.2	138,471	3.6
750.00–799.90	895,276	5.4	739,701	5.9	155,575	4.0
800.00–849.90	832,210	5.1	666,839	5.3	165,371	4.3
850.00–899.90	741,145	4.5	571,549	4.5	169,596	4.4
900.00–949.90	687,288	4.2	518,811	4.1	168,477	4.3
950.00–999.90	654,909	4.0	491,096	3.9	163,813	4.2
1,000.00–1,049.90	637,249	3.9	474,312	3.8	162,937	4.2
1,050.00–1,099.90	630,878	3.8	465,156	3.7	165,722	4.3
1,100.00–1,149.90	618,878	3.8	456,385	3.6	162,493	4.2
1,150.00–1,199.90	611,623	3.7	454,352	3.6	157,271	4.1
1,200.00–1,249.90	584,086	3.6	434,137	3.5	149,949	3.9
1,250.00–1,299.90	572,759	3.5	425,469	3.4	147,290	3.8
1,300.00–1,349.90	547,240	3.3	405,633	3.2	141,607	3.6
1,350.00–1,399.90	475,293	2.9	345,061	2.7	130,232	3.4
1,400.00–1,449.90	448,457	2.7	327,064	2.6	121,393	3.1
1,450.00–1,499.90	401,976	2.4	288,903	2.3	113,073	2.9
1,500.00–1,549.90	349,559	2.1	244,675	1.9	104,884	2.7
1,550.00–1,599.90	314,325	1.9	211,027	1.7	103,298	2.7
1,600.00–1,649.90	273,079	1.7	175,067	1.4	98,012	2.5
1,650.00–1,699.90	211,440	1.3	128,013	1.0	83,427	2.1
1,700.00–1,749.90	174,971	1.1	101,575	0.8	73,396	1.9
1,750.00–1,799.90	145,026	0.9	80,324	0.6	64,702	1.7
1,800.00–1,849.90	122,556	0.7	64,531	0.5	58,025	1.5
1,850.00–1,899.90	106,323	0.6	50,175	0.4	56,148	1.4
1,900.00–1,949.90	85,272	0.5	38,522	0.3	46,750	1.2
1,950.00–1,999.90	68,539	0.4	29,584	0.2	38,955	1.0
2,000.00 or more	274,947	1.7	107,081	0.9	167,866	4.3
Average benefit (dollars)	1,011.40		964.70		1,162.50	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B7—Number and percentage distribution with and without reduction for early retirement, by sex and primary insurance amount, December 2009

Sex and primary insurance amount (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	33,514,013	100.0	24,748,391	100.0	8,765,622	100.0
Less than 400.00	2,304,079	6.9	1,838,375	7.4	465,704	5.3
400.00–449.90	598,306	1.8	475,905	1.9	122,401	1.4
450.00–499.90	516,420	1.5	413,999	1.7	102,421	1.2
500.00–549.90	569,607	1.7	452,679	1.8	116,928	1.3
550.00–599.90	839,386	2.5	646,140	2.6	193,246	2.2
600.00–649.90	915,454	2.7	699,873	2.8	215,581	2.5
650.00–699.90	1,099,529	3.3	858,237	3.5	241,292	2.8
700.00–749.90	1,107,731	3.3	861,884	3.5	245,847	2.8
750.00–799.90	1,105,695	3.3	858,925	3.5	246,770	2.8
800.00–849.90	1,048,159	3.1	802,255	3.2	245,904	2.8
850.00–899.90	1,021,699	3.0	774,673	3.1	247,026	2.8
900.00–949.90	993,258	3.0	746,759	3.0	246,499	2.8
950.00–999.90	960,708	2.9	716,399	2.9	244,309	2.8
1,000.00–1,049.90	947,044	2.8	699,971	2.8	247,073	2.8
1,050.00–1,099.90	926,874	2.8	679,862	2.7	247,012	2.8
1,100.00–1,149.90	907,970	2.7	664,067	2.7	243,903	2.8
1,150.00–1,199.90	897,335	2.7	655,884	2.7	241,451	2.8
1,200.00–1,249.90	881,991	2.6	643,336	2.6	238,655	2.7
1,250.00–1,299.90	882,588	2.6	645,000	2.6	237,588	2.7
1,300.00–1,349.90	888,152	2.7	650,943	2.6	237,209	2.7
1,350.00–1,399.90	894,097	2.7	657,904	2.7	236,193	2.7
1,400.00–1,449.90	940,977	2.8	693,447	2.8	247,530	2.8
1,450.00–1,499.90	963,118	2.9	701,378	2.8	261,740	3.0
1,500.00–1,549.90	970,916	2.9	698,110	2.8	272,806	3.1
1,550.00–1,599.90	1,118,630	3.3	802,113	3.2	316,517	3.6
1,600.00–1,649.90	1,158,859	3.5	832,252	3.4	326,607	3.7
1,650.00–1,699.90	999,453	3.0	714,285	2.9	285,168	3.3
1,700.00–1,749.90	877,131	2.6	605,230	2.4	271,901	3.1
1,750.00–1,799.90	774,706	2.3	520,363	2.1	254,343	2.9
1,800.00–1,849.90	717,439	2.1	486,283	2.0	231,156	2.6
1,850.00–1,899.90	795,505	2.4	562,662	2.3	232,843	2.7
1,900.00–1,949.90	718,260	2.1	526,869	2.1	191,391	2.2
1,950.00–1,999.90	629,442	1.9	467,116	1.9	162,326	1.9
2,000.00 or more	2,543,495	7.6	1,695,213	6.8	848,282	9.7
Average primary insurance amount (dollars)	1,208.40		1,182.20		1,282.40	

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B7—Number and percentage distribution with and without reduction for early retirement, by sex and primary insurance amount, December 2009—Continued

Sex and primary insurance amount (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Men	17,067,434	100.0	12,182,366	100.0	4,885,068	100.0
Less than 400.00	586,797	3.4	419,538	3.4	167,259	3.4
400.00–449.90	132,381	0.8	94,905	0.8	37,476	0.8
450.00–499.90	119,852	0.7	88,227	0.7	31,625	0.6
500.00–549.90	125,735	0.7	91,487	0.8	34,248	0.7
550.00–599.90	167,701	1.0	116,115	1.0	51,586	1.1
600.00–649.90	186,164	1.1	128,189	1.1	57,975	1.2
650.00–699.90	231,560	1.4	165,983	1.4	65,577	1.3
700.00–749.90	244,073	1.4	176,417	1.4	67,656	1.4
750.00–799.90	252,003	1.5	183,508	1.5	68,495	1.4
800.00–849.90	254,797	1.5	183,112	1.5	71,685	1.5
850.00–899.90	265,288	1.6	191,263	1.6	74,025	1.5
900.00–949.90	276,883	1.6	199,956	1.6	76,927	1.6
950.00–999.90	290,363	1.7	209,971	1.7	80,392	1.6
1,000.00–1,049.90	311,387	1.8	224,871	1.8	86,516	1.8
1,050.00–1,099.90	332,892	2.0	240,887	2.0	92,005	1.9
1,100.00–1,149.90	357,142	2.1	259,589	2.1	97,553	2.0
1,150.00–1,199.90	386,034	2.3	281,524	2.3	104,510	2.1
1,200.00–1,249.90	415,582	2.4	303,882	2.5	111,700	2.3
1,250.00–1,299.90	454,642	2.7	334,813	2.7	119,829	2.5
1,300.00–1,349.90	497,683	2.9	368,648	3.0	129,035	2.6
1,350.00–1,399.90	545,826	3.2	407,101	3.3	138,725	2.8
1,400.00–1,449.90	623,651	3.7	466,551	3.8	157,100	3.2
1,450.00–1,499.90	677,924	4.0	499,855	4.1	178,069	3.6
1,500.00–1,549.90	715,348	4.2	519,322	4.3	196,026	4.0
1,550.00–1,599.90	869,469	5.1	631,801	5.2	237,668	4.9
1,600.00–1,649.90	933,871	5.5	680,418	5.6	253,453	5.2
1,650.00–1,699.90	816,464	4.8	589,966	4.8	226,498	4.6
1,700.00–1,749.90	719,906	4.2	498,688	4.1	221,218	4.5
1,750.00–1,799.90	634,297	3.7	423,978	3.5	210,319	4.3
1,800.00–1,849.90	585,018	3.4	393,794	3.2	191,224	3.9
1,850.00–1,899.90	643,639	3.8	450,947	3.7	192,692	3.9
1,900.00–1,949.90	591,846	3.5	432,412	3.5	159,434	3.3
1,950.00–1,999.90	530,699	3.1	394,343	3.2	136,356	2.8
2,000.00 or more	2,290,517	13.4	1,530,305	12.6	760,212	15.6
Average primary insurance amount (dollars)	1,469.30		1,459.10		1,494.90	

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B7—Number and percentage distribution with and without reduction for early retirement, by sex and primary insurance amount, December 2009—Continued

Sex and primary insurance amount (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	16,446,579	100.0	12,566,025	100.0	3,880,554	100.0
Less than 400.00	1,717,282	10.4	1,418,837	11.3	298,445	7.7
400.00–449.90	465,925	2.8	381,000	3.0	84,925	2.2
450.00–499.90	396,568	2.4	325,772	2.6	70,796	1.8
500.00–549.90	443,872	2.7	361,192	2.9	82,680	2.1
550.00–599.90	671,685	4.1	530,025	4.2	141,660	3.7
600.00–649.90	729,290	4.4	571,684	4.5	157,606	4.1
650.00–699.90	867,969	5.3	692,254	5.5	175,715	4.5
700.00–749.90	863,658	5.3	685,467	5.5	178,191	4.6
750.00–799.90	853,692	5.2	675,417	5.4	178,275	4.6
800.00–849.90	793,362	4.8	619,143	4.9	174,219	4.5
850.00–899.90	756,411	4.6	583,410	4.6	173,001	4.5
900.00–949.90	716,375	4.4	546,803	4.4	169,572	4.4
950.00–999.90	670,345	4.1	506,428	4.0	163,917	4.2
1,000.00–1,049.90	635,657	3.9	475,100	3.8	160,557	4.1
1,050.00–1,099.90	593,982	3.6	438,975	3.5	155,007	4.0
1,100.00–1,149.90	550,828	3.3	404,478	3.2	146,350	3.8
1,150.00–1,199.90	511,301	3.1	374,360	3.0	136,941	3.5
1,200.00–1,249.90	466,409	2.8	339,454	2.7	126,955	3.3
1,250.00–1,299.90	427,946	2.6	310,187	2.5	117,759	3.0
1,300.00–1,349.90	390,469	2.4	282,295	2.2	108,174	2.8
1,350.00–1,399.90	348,271	2.1	250,803	2.0	97,468	2.5
1,400.00–1,449.90	317,326	1.9	226,896	1.8	90,430	2.3
1,450.00–1,499.90	285,194	1.7	201,523	1.6	83,671	2.2
1,500.00–1,549.90	255,568	1.6	178,788	1.4	76,780	2.0
1,550.00–1,599.90	249,161	1.5	170,312	1.4	78,849	2.0
1,600.00–1,649.90	224,988	1.4	151,834	1.2	73,154	1.9
1,650.00–1,699.90	182,989	1.1	124,319	1.0	58,670	1.5
1,700.00–1,749.90	157,225	1.0	106,542	0.8	50,683	1.3
1,750.00–1,799.90	140,409	0.9	96,385	0.8	44,024	1.1
1,800.00–1,849.90	132,421	0.8	92,489	0.7	39,932	1.0
1,850.00–1,899.90	151,866	0.9	111,715	0.9	40,151	1.0
1,900.00–1,949.90	126,414	0.8	94,457	0.8	31,957	0.8
1,950.00–1,999.90	98,743	0.6	72,773	0.6	25,970	0.7
2,000.00 or more	252,978	1.5	164,908	1.3	88,070	2.3
Average primary insurance amount (dollars)	937.60		913.70		1,014.80	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

Table 5.B8—Number and average monthly benefit with and without reduction for early retirement, by sex, December 1956–2009, selected years

Year	All retired workers				Men				Women			
	Total	With reduction for early retirement	Without reduction for early retirement	Early retirees as a percentage of total	Subtotal	With reduction for early retirement	Without reduction for early retirement	Early retirees as a percentage of subtotal	Subtotal	With reduction for early retirement	Without reduction for early retirement	Early retirees as a percentage of subtotal
<i>Number</i>												
1956	5,112,430	115,029	4,997,401	2.2	3,572,271	...	3,572,271	...	1,540,159	115,029	1,425,130	7.5
1960	8,061,469	949,204	7,112,265	11.8	5,216,668	...	5,216,668	...	2,844,801	949,204	1,895,597	33.4
1965	11,100,584	3,519,198	7,581,386	31.7	6,825,078	1,435,912	5,389,166	21.0	4,275,506	2,083,286	2,192,220	48.7
1970	13,349,175	6,066,880	7,282,295	45.4	7,688,460	2,758,060	4,930,400	35.9	5,660,715	3,308,820	2,351,895	58.5
1980	19,562,085	12,164,887	7,397,198	62.2	10,460,735	5,874,196	4,586,539	54.8	9,101,350	6,290,691	2,810,659	69.1
1985	22,431,930	14,710,971	7,720,959	65.6	11,816,956	7,161,479	4,655,477	60.6	10,614,974	7,549,492	3,065,482	71.1
1990	24,838,100	16,997,861	7,840,239	68.4	12,983,832	8,390,921	4,592,911	64.6	11,854,268	8,606,940	3,247,328	72.6
1995	26,672,806	18,731,443	7,941,363	70.2	13,913,531	9,353,996	4,559,535	67.2	12,759,275	9,377,447	3,381,828	73.5
1996	26,898,072	19,113,994	7,784,078	71.1	14,010,875	9,532,310	4,478,565	68.0	12,887,197	9,581,684	3,305,513	74.4
1997	27,274,572	19,601,286	7,673,286	71.9	14,116,818	9,745,315	4,371,503	69.0	13,157,754	9,855,971	3,301,783	74.9
1998	27,510,535	19,810,871	7,699,664	72.0	14,200,826	9,828,931	4,371,895	69.2	13,309,709	9,981,940	3,327,769	75.0
1999	27,774,677	20,035,120	7,739,557	72.1	14,321,468	9,935,547	4,385,921	69.4	13,453,209	10,099,573	3,353,636	75.1
2000	28,498,945	20,319,520	8,179,425	71.3	14,767,170	10,076,518	4,690,652	68.2	13,731,775	10,243,002	3,488,773	74.6
2001	28,836,774	20,573,931	8,262,843	71.3	14,930,081	10,210,581	4,719,500	68.4	13,906,693	10,363,350	3,543,340	74.5
2002	29,190,137	20,883,715	8,306,422	71.5	15,100,473	10,364,188	4,736,285	68.8	14,089,664	10,519,527	3,570,137	74.7
2003	29,531,611	21,239,589	8,292,022	71.9	15,247,841	10,542,626	4,705,215	69.1	14,283,770	10,696,963	3,586,807	74.9
2004	29,952,465	21,636,057	8,316,408	72.2	15,430,360	10,749,558	4,680,802	69.7	14,522,105	10,886,499	3,635,606	75.0
2005	30,460,836	22,129,099	8,331,737	72.6	15,650,611	10,981,621	4,668,990	70.2	14,810,225	11,147,478	3,662,747	75.3
2006	30,976,143	22,597,344	8,378,799	73.0	15,869,182	11,196,443	4,672,739	70.6	15,106,961	11,400,901	3,706,060	75.5
2007	31,527,728	23,078,917	8,448,811	73.2	16,111,553	11,413,127	4,698,426	70.8	15,416,175	11,665,790	3,750,385	75.7
2008	32,273,651	23,775,246	8,498,405	73.7	16,455,822	11,708,571	4,747,251	71.2	15,817,829	12,066,675	3,751,154	76.3
2009	33,514,013	24,748,391	8,765,622	73.8	17,067,434	12,182,366	4,885,068	71.4	16,466,579	12,566,025	3,880,554	76.4
<i>Average monthly benefit (dollars)</i>												
1956	63.10	48.20	63.40	...	68.20	...	68.20	...	51.20	48.20	51.40	...
1960	74.00	55.80	76.50	...	81.90	...	81.90	...	59.70	55.80	61.60	...
1965	83.90	70.60	90.10	...	92.60	79.40	96.10	...	70.10	64.50	75.40	...
1970	118.10	103.60	130.20	...	130.50	115.30	139.10	...	101.20	93.80	111.70	...
1980	341.40	310.70	391.80	...	380.20	349.50	419.60	...	296.80	274.60	346.50	...
1985	478.60	424.80	581.20	...	538.40	480.50	627.50	...	412.10	372.00	511.00	...
1990	602.60	537.90	742.80	...	679.30	611.20	803.60	...	518.60	466.40	656.80	...
1995	719.80	649.50	885.60	...	810.20	735.40	963.70	...	621.20	563.80	780.40	...
1996	745.00	678.30	908.70	...	838.10	763.10	997.80	...	643.70	593.90	788.00	...
1997	765.00	705.90	915.90	...	860.50	786.60	1,025.10	...	662.50	626.10	771.30	...
1998	779.70	720.30	932.50	...	876.90	802.40	1,044.50	...	675.90	639.50	785.40	...
1999	804.30	744.40	959.20	...	904.60	829.30	1,075.30	...	697.50	661.00	807.50	...
2000	844.50	778.50	1,008.40	...	951.10	867.20	1,131.10	...	729.90	691.20	843.40	...
2001	874.40	808.50	1,038.70	...	984.60	900.70	1,166.00	...	756.20	717.60	869.20	...
2002	895.00	829.80	1,058.90	...	1,007.80	925.20	1,188.50	...	774.10	735.80	886.90	...
2003	922.10	857.80	1,086.80	...	1,038.70	957.50	1,220.60	...	797.60	759.50	911.30	...
2004	954.90	891.10	1,121.00	...	1,076.10	995.40	1,261.50	...	826.10	788.00	940.10	...
2005	1,002.00	936.90	1,174.80	...	1,129.50	1,047.40	1,322.70	...	867.30	828.20	986.40	...
2006	1,044.40	978.20	1,222.90	...	1,177.50	1,094.10	1,377.20	...	904.60	864.40	1,028.50	...
2007	1,078.60	1,011.30	1,262.30	...	1,215.70	1,131.20	1,421.10	...	935.20	894.00	1,063.30	...
2008	1,152.90	1,080.80	1,354.60	...	1,299.10	1,209.80	1,519.50	...	1,000.70	955.60	1,145.80	...
2009	1,164.30	1,091.10	1,371.10	...	1,311.70	1,221.40	1,536.80	...	1,011.40	964.70	1,162.50	...

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: ... = not applicable.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B9—Number and percentage distribution, by sex, monthly benefit, and age, December 2009

Monthly benefit (dollars)	Total, 62 or older	62–64	65–69	70–74	75–79	80–84	85–89	90 or older
<i>All retired workers</i>								
Total								
Number (thousands)	33,514	3,134	9,093	7,503	5,667	4,239	2,584	1,294
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00	4.5	7.0	4.6	4.5	4.4	3.8	3.6	2.8
400.00–449.90	1.1	1.5	1.0	1.0	1.0	1.0	1.2	1.5
450.00–499.90	1.3	1.6	1.1	1.2	1.6	1.6	1.6	1.3
500.00–549.90	2.0	3.2	1.8	1.8	2.0	2.0	2.0	1.6
550.00–599.90	2.5	3.7	2.2	2.2	2.7	2.9	2.7	1.9
600.00–649.90	3.2	4.0	2.7	3.1	3.9	3.7	2.9	2.2
650.00–699.90	3.6	4.4	3.3	3.9	4.1	3.2	2.7	2.3
700.00–749.90	3.6	5.1	3.8	3.7	3.4	3.0	2.7	2.4
750.00–799.90	3.6	5.3	4.0	3.5	3.3	3.0	2.8	2.5
800.00–849.90	3.5	4.9	3.7	3.4	3.2	2.9	2.7	2.6
850.00–899.90	3.3	3.9	3.4	3.3	3.2	2.9	2.9	2.8
900.00–949.90	3.2	3.3	3.3	3.2	3.2	3.0	3.1	3.2
950.00–999.90	3.2	3.2	3.2	3.1	3.2	3.1	3.4	3.7
1,000.00–1,049.90	3.3	3.1	3.1	3.1	3.2	3.3	3.9	4.4
1,050.00–1,099.90	3.4	3.0	3.0	3.1	3.4	3.7	4.7	5.0
1,100.00–1,149.90	3.5	2.9	2.9	3.1	3.5	4.0	5.8	5.7
1,150.00–1,199.90	3.7	2.8	2.8	3.1	3.7	4.5	7.2	5.6
1,200.00–1,249.90	3.7	2.7	2.8	3.1	3.9	5.3	6.5	5.2
1,250.00–1,299.90	4.1	2.7	2.7	3.3	5.3	7.3	5.0	4.9
1,300.00–1,349.90	4.1	2.6	2.7	3.7	6.2	6.2	4.1	4.5
1,350.00–1,399.90	3.7	2.6	2.8	4.0	5.4	3.9	3.7	3.7
1,400.00–1,449.90	3.8	4.1	3.5	4.4	3.9	3.2	3.6	3.4
1,450.00–1,499.90	3.6	4.4	3.8	4.2	2.8	3.0	3.6	3.2
1,500.00–1,549.90	3.4	4.2	3.7	3.7	2.5	2.9	3.3	3.1
1,550.00–1,599.90	3.2	3.7	3.5	3.3	2.6	3.0	2.8	2.9
1,600.00–1,649.90	2.9	3.3	3.3	2.9	2.5	2.5	2.3	3.1
1,650.00–1,699.90	2.4	2.8	2.8	2.4	2.1	2.0	1.6	2.2
1,700.00 or more	12.5	4.1	18.2	14.8	9.9	9.0	7.6	12.5
Average benefit (dollars)	1,164.30	1,025.40	1,218.90	1,186.60	1,135.10	1,148.10	1,139.70	1,218.60
<i>Men</i>								
Total								
Number (thousands)	17,067	1,555	4,806	3,981	2,979	2,112	1,169	464
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00	4.2	6.1	4.2	4.2	4.3	3.4	3.5	2.9
400.00–449.90	0.8	1.0	0.8	0.8	0.8	0.8	1.0	1.4
450.00–499.90	1.0	1.0	0.8	0.8	1.1	1.2	1.2	1.2
500.00–549.90	1.3	2.0	1.1	1.1	1.2	1.3	1.4	1.3
550.00–599.90	1.5	2.2	1.3	1.3	1.4	1.5	1.6	1.5
600.00–649.90	1.6	2.3	1.4	1.4	1.6	1.6	1.8	1.6
650.00–699.90	1.7	2.3	1.6	1.5	1.6	1.7	1.7	1.6
700.00–749.90	1.7	2.3	1.7	1.6	1.7	1.8	1.8	1.7
750.00–799.90	1.8	2.4	1.7	1.7	1.9	1.9	2.0	1.8
800.00–849.90	1.9	2.4	1.8	1.8	2.0	2.0	2.1	1.9
850.00–899.90	2.1	2.5	1.9	1.9	2.2	2.2	2.3	2.2
900.00–949.90	2.2	2.6	1.9	2.1	2.4	2.4	2.6	2.5
950.00–999.90	2.4	2.8	2.1	2.2	2.6	2.6	3.0	2.9
1,000.00–1,049.90	2.7	2.9	2.2	2.4	2.9	3.0	3.7	3.5
1,050.00–1,099.90	2.9	3.0	2.3	2.6	3.2	3.4	4.7	4.3
1,100.00–1,149.90	3.3	3.1	2.4	2.8	3.5	3.9	6.5	5.9
1,150.00–1,199.90	3.7	3.2	2.6	2.9	3.9	4.5	8.6	5.4
1,200.00–1,249.90	3.9	3.2	2.7	3.2	4.2	6.0	7.9	5.1

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B9—Number and percentage distribution, by sex, monthly benefit, and age, December 2009—Continued

Monthly benefit (dollars)	Total, 62 or older	62–64	65–69	70–74	75–79	80–84	85–89	90 or older
<i>Men (cont.)</i>								
1,250.00–1,299.90	4.8	3.2	2.8	3.5	6.7	9.7	5.4	4.8
1,300.00–1,349.90	4.9	3.3	2.9	4.3	8.2	8.1	4.1	4.4
1,350.00–1,399.90	4.6	3.4	3.2	5.0	7.4	4.5	3.9	3.8
1,400.00–1,449.90	4.9	5.7	4.4	5.9	5.2	3.6	4.0	3.7
1,450.00–1,499.90	4.8	6.6	5.1	5.7	3.4	3.4	4.2	3.8
1,500.00–1,549.90	4.6	6.6	5.2	5.1	3.0	3.3	4.0	3.9
1,550.00–1,599.90	4.4	6.1	5.1	4.6	3.2	3.7	3.3	3.6
1,600.00–1,649.90	4.1	5.7	4.9	4.1	3.2	3.3	2.6	3.8
1,650.00–1,699.90	3.4	4.9	4.2	3.2	2.8	2.7	1.9	2.5
1,700.00 or more	18.8	7.4	27.8	22.2	14.4	12.7	9.2	16.8
Average benefit (dollars)	1,311.70	1,190.80	1,403.90	1,345.40	1,262.00	1,258.10	1,203.40	1,306.90
<i>Women</i>								
Total								
Number (thousands)	16,447	1,579	4,286	3,522	2,688	2,127	1,415	829
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00	4.8	7.9	5.1	4.7	4.6	4.1	3.6	2.7
400.00–449.90	1.3	1.9	1.2	1.2	1.2	1.2	1.4	1.6
450.00–499.90	1.8	2.1	1.4	1.6	2.1	2.0	1.8	1.4
500.00–549.90	2.7	4.4	2.5	2.5	2.8	2.7	2.5	1.7
550.00–599.90	3.7	5.2	3.2	3.4	4.0	4.2	3.6	2.2
600.00–649.90	4.9	5.6	4.1	5.0	6.4	5.7	3.8	2.6
650.00–699.90	5.5	6.5	5.3	6.5	6.8	4.8	3.5	2.6
700.00–749.90	5.6	7.9	6.3	6.1	5.2	4.3	3.5	2.7
750.00–799.90	5.4	8.2	6.5	5.6	4.8	4.1	3.4	2.8
800.00–849.90	5.1	7.4	6.0	5.2	4.6	3.9	3.3	2.9
850.00–899.90	4.5	5.3	5.1	4.8	4.3	3.7	3.3	3.2
900.00–949.90	4.2	4.0	4.7	4.5	4.0	3.5	3.5	3.6
950.00–999.90	4.0	3.6	4.4	4.1	3.8	3.5	3.7	4.2
1,000.00–1,049.90	3.9	3.2	4.1	3.9	3.6	3.7	4.1	4.8
1,050.00–1,099.90	3.8	3.0	3.8	3.7	3.6	3.9	4.7	5.4
1,100.00–1,149.90	3.8	2.7	3.5	3.5	3.5	4.2	5.3	5.6
1,150.00–1,199.90	3.7	2.5	3.2	3.2	3.5	4.5	6.0	5.7
1,200.00–1,249.90	3.6	2.3	2.9	3.1	3.5	4.7	5.4	5.3
1,250.00–1,299.90	3.5	2.1	2.7	3.1	3.9	4.9	4.7	5.0
1,300.00–1,349.90	3.3	1.9	2.5	3.1	4.0	4.4	4.2	4.5
1,350.00–1,399.90	2.9	1.8	2.4	2.9	3.3	3.4	3.5	3.6
1,400.00–1,449.90	2.7	2.4	2.5	2.8	2.6	2.9	3.3	3.2
1,450.00–1,499.90	2.4	2.3	2.3	2.4	2.2	2.6	3.1	2.9
1,500.00–1,549.90	2.1	1.8	2.0	2.0	1.9	2.4	2.7	2.7
1,550.00–1,599.90	1.9	1.4	1.8	1.8	1.9	2.2	2.3	2.5
1,600.00–1,649.90	1.7	1.0	1.5	1.6	1.7	1.8	2.0	2.6
1,650.00–1,699.90	1.3	0.7	1.3	1.4	1.3	1.3	1.4	2.0
1,700.00 or more	5.9	0.9	7.5	6.4	4.9	5.3	6.2	10.1
Average benefit (dollars)	1,011.40	862.40	1,011.40	1,007.20	994.40	1,038.80	1,087.00	1,169.20

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

5.C OASDI Current-Pay Benefits: Retired Workers and Dependents

Table 5.C1—Number and percentage distribution, by primary insurance amount and type of benefit, December 2009

Primary insurance amount (dollars)	Retired workers		Wives and husbands		Children	
	Number	Percent	Number	Percent	Number	Percent
Total	33,514,013	100.0	2,343,601	100.0	561,451	100.0
Less than 300.00	1,253,965	3.7	62,022	2.6	8,492	1.5
300.00–349.90	528,570	1.6	20,506	0.9	3,862	0.7
350.00–399.90	521,544	1.6	20,430	0.9	4,400	0.8
400.00–449.90	598,306	1.8	21,157	0.9	4,850	0.9
450.00–499.90	516,420	1.5	19,501	0.8	4,878	0.9
500.00–549.90	569,607	1.7	20,790	0.9	5,050	0.9
550.00–599.90	839,386	2.5	29,738	1.3	6,868	1.2
600.00–649.90	915,454	2.7	32,770	1.4	7,888	1.4
650.00–699.90	1,099,529	3.3	38,187	1.6	12,221	2.2
700.00–749.90	1,107,731	3.3	37,407	1.6	13,619	2.4
750.00–799.90	1,105,695	3.3	36,590	1.6	13,806	2.5
800.00–849.90	1,048,159	3.1	36,148	1.5	13,710	2.4
850.00–899.90	1,021,699	3.0	35,919	1.5	13,908	2.5
900.00–949.90	993,258	3.0	36,853	1.6	14,290	2.5
950.00–999.90	960,708	2.9	37,778	1.6	14,388	2.6
1,000.00–1,049.90	947,044	2.8	40,158	1.7	14,353	2.6
1,050.00–1,099.90	926,874	2.8	41,663	1.8	14,632	2.6
1,100.00–1,149.90	907,970	2.7	43,684	1.9	15,058	2.7
1,150.00–1,199.90	897,335	2.7	46,713	2.0	15,543	2.8
1,200.00–1,249.90	881,991	2.6	49,523	2.1	15,459	2.8
1,250.00–1,299.90	882,588	2.6	54,047	2.3	16,088	2.9
1,300.00–1,349.90	888,152	2.7	58,971	2.5	16,141	2.9
1,350.00–1,399.90	894,097	2.7	65,860	2.8	16,672	3.0
1,400.00–1,449.90	940,977	2.8	79,485	3.4	17,709	3.2
1,450.00–1,499.90	963,118	2.9	90,164	3.8	17,801	3.2
1,500.00–1,549.90	970,916	2.9	99,444	4.2	18,285	3.3
1,550.00–1,599.90	1,118,630	3.3	127,946	5.5	20,236	3.6
1,600.00–1,649.90	1,158,859	3.5	144,600	6.2	21,134	3.8
1,650.00–1,699.90	999,453	3.0	128,357	5.5	19,015	3.4
1,700.00–1,749.90	877,131	2.6	111,237	4.7	17,322	3.1
1,750.00–1,799.90	774,706	2.3	94,839	4.0	16,342	2.9
1,800.00–1,849.90	717,439	2.1	80,324	3.4	16,002	2.9
1,850.00–1,899.90	795,505	2.4	78,016	3.3	19,826	3.5
1,900.00–1,949.90	718,260	2.1	67,661	2.9	18,957	3.4
1,950.00–1,999.90	629,442	1.9	61,073	2.6	16,725	3.0
2,000.00 or more	2,543,495	7.6	294,040	12.5	75,921	13.5
Average primary insurance amount (dollars)	1,208.40		1,443.70		1,398.80	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

5.C OASDI Current-Pay Benefits: Retired Workers and Dependents

Table 5.C2—Average monthly benefit, by type of benefit and sex, December 1940–2009, selected years (in dollars)

Year	Retired workers			Wives			Husbands	Children			
	All	Men	Women	All	Entitled because of age ^a	Entitled because of children ^b		All	Under age 18	Disabled adult children	Students
1940	22.60	23.17	18.37	12.13	12.13	...	...	12.22	12.22	...	...
1945	24.19	24.94	19.51	12.82	12.82	...	...	12.45	12.45	...	...
1946	24.55	25.30	19.64	12.99	12.99	...	...	12.57	12.57	...	...
1947	24.90	25.68	19.91	13.17	13.17	...	...	12.77	12.77	...	...
1948	25.35	26.21	20.11	13.42	13.42	...	...	12.99	12.99	...	...
1949	26.00	26.92	20.58	13.76	13.76	...	...	13.18	13.18	...	...
1950	43.86	45.67	35.05	23.60	23.79	12.85	20.01	17.05	17.05	...	...
1951	42.14	44.44	33.03	22.75	23.16	14.33	19.49	13.37	13.37	...	...
1952	49.25	52.16	39.17	26.01	26.48	16.33	22.31	14.67	14.67	...	...
1953	51.10	54.46	40.66	27.08	27.53	17.97	23.10	15.79	15.79	...	...
1954	59.14	63.34	47.05	31.81	32.36	21.11	26.61	18.53	18.53	...	...
1955	61.90	66.40	49.93	33.12	33.63	22.96	27.27	20.01	20.01	...	...
1956	63.09	68.23	51.16	33.76	34.22	23.64	27.90	20.63	20.63	...	...
1957	64.58	70.47	52.23	34.41	34.89	24.21	29.39	21.89	20.90	31.55	...
1958	66.35	72.74	53.55	35.11	35.59	25.12	30.45	22.99	21.66	32.00	...
1959	72.78	80.11	58.81	38.24	38.68	29.39	33.85	27.34	25.61	35.08	...
1960	74.04	81.87	59.67	38.74	39.19	30.15	34.72	28.25	26.38	35.70	...
1961	75.65	83.13	62.00	39.47	40.09	29.45	36.61	27.52	25.56	36.22	...
1962	76.19	83.79	62.61	39.64	40.35	29.55	37.05	27.39	25.44	36.35	...
1963	76.88	84.69	63.42	39.95	40.66	29.94	37.64	27.85	25.76	36.84	...
1964	77.57	85.58	64.28	40.24	40.95	30.16	38.18	28.13	25.86	37.34	...
1965	83.92	92.59	70.07	43.64	44.41	32.60	41.69	31.98	28.27	40.64	46.75
1966	84.35	93.26	70.79	43.82	44.60	32.64	42.21	32.72	28.18	41.03	45.05
1967	85.37	94.49	71.92	44.25	45.01	32.92	42.79	33.10	28.34	41.49	45.07
1968	98.86	109.08	84.24	51.22	52.13	37.66	49.29	38.12	32.44	47.79	51.08
1969	100.40	110.96	85.71	51.89	52.81	38.00	49.90	38.63	32.79	48.46	51.33
1970	118.10	130.53	101.22	61.20	62.41	43.23	58.47	44.85	37.72	56.79	59.46
1971	132.17	146.13	113.60	68.36	69.82	47.07	65.25	49.36	41.08	62.57	65.93
1972	162.35	179.44	140.11	84.11	86.07	56.10	79.97	59.90	49.44	75.91	80.13
1973	166.40	182.60	145.80	84.80	86.80	56.80	80.80	61.10	50.30	77.00	82.70
1974	188.20	206.56	165.47	95.77	98.08	64.24	90.90	69.63	57.10	86.61	94.21
1975	207.18	227.75	181.80	105.21	107.74	70.72	99.07	77.42	63.13	94.75	103.88
1976	224.86	247.70	197.08	114.15	116.82	77.29	106.68	85.64	69.55	102.81	113.92
1977	243.00	268.40	212.60	123.30	126.20	84.20	100.90	94.90	76.90	112.30	124.60
1978	263.20	291.60	229.70	133.10	136.00	91.70	106.00	104.70	85.10	121.70	138.40
1979	294.30	326.80	256.50	148.80	151.90	102.90	116.00	119.20	97.00	137.10	157.20
1980	341.40	380.20	296.80	172.50	176.00	120.40	132.10	140.00	114.30	159.80	184.00
1981	386.00	431.10	334.50	195.40	199.20	138.20	145.90	161.40	131.10	182.20	210.60
1982	419.30	469.60	362.20	213.60	216.90	148.80	156.00	165.00	145.90	198.40	179.70
1983	440.80	495.00	379.60	226.50	229.50	151.30	160.90	175.80	163.20	210.10	153.50
1984	460.60	517.80	396.50	237.20	240.30	156.70	165.80	185.50	170.60	220.80	149.90
1985	478.60	538.40	412.10	247.20	250.30	161.90	169.50	197.60	177.40	230.80	232.30
1986	488.50	549.80	420.50	252.70	255.70	165.10	170.40	203.80	182.50	236.80	241.20
1987	512.70	577.50	441.20	265.40	268.40	174.00	175.90	215.90	192.70	249.90	252.60
1988	536.80	604.90	462.00	278.00	281.00	182.40	181.50	227.70	201.60	263.30	265.40
1989	566.90	638.90	487.90	293.80	296.80	194.00	189.10	242.40	213.80	279.30	283.70
1990	602.60	679.30	518.60	312.30	315.40	208.10	198.20	259.40	228.50	298.30	300.90
1991	629.30	709.30	541.60	326.10	329.20	219.40	203.30	272.70	240.60	312.90	306.70
1992	652.60	735.50	561.80	337.90	341.00	229.30	208.20	285.20	252.30	326.00	322.20
1993	674.10	759.30	580.70	348.80	351.80	238.70	212.10	296.80	263.10	338.00	333.40
1994	697.30	785.20	610.30	360.50	363.60	248.60	216.40	309.30	275.00	351.10	349.60

(Continued)

5.C OASDI Current-Pay Benefits: Retired Workers and Dependents

Table 5.C2—Average monthly benefit, by type of benefit and sex, December 1940–2009, selected years (in dollars)—Continued

Year	Retired workers			Wives			Husbands	Children			
	All	Men	Women	All	Entitled because of age ^a	Entitled because of children ^b		All	Under age 18	Disabled adult children	Students
1995	719.80	810.20	621.20	371.90	375.00	256.70	220.80	321.50	286.70	363.80	360.30
1996	745.00	838.10	643.70	385.10	387.70	277.30	225.70	337.10	303.00	378.40	374.70
1997	765.00	860.50	662.50	394.70	397.20	286.40	228.80	349.00	314.90	389.80	388.40
1998	779.70	876.90	675.90	401.70	404.00	294.90	230.50	358.40	324.30	399.00	398.00
1999	804.30	904.60	697.50	413.00	415.30	307.50	234.50	372.40	338.90	413.00	417.30
2000	844.50	951.10	729.90	431.30	433.50	328.90	242.70	394.80	363.40	433.70	444.40
2001	874.40	984.60	756.20	445.10	447.20	345.30	250.30	412.60	382.20	451.00	462.60
2002	895.00	1,007.80	774.10	453.90	456.00	358.00	256.10	426.40	397.10	463.90	477.00
2003	922.10	1,038.70	797.60	465.90	467.80	374.60	263.10	444.20	415.80	480.60	498.60
2004	954.90	1,076.10	826.10	480.90	482.60	394.00	272.90	465.00	437.70	500.50	518.50
2005	1,002.00	1,129.50	867.30	502.50	504.10	419.20	286.20	493.00	465.60	528.40	553.30
2006	1,044.40	1,177.50	904.60	521.40	522.90	440.20	298.30	518.10	489.90	554.40	580.00
2007	1,078.60	1,215.70	935.20	535.60	537.00	456.70	308.50	538.00	509.60	573.50	603.30
2008	1,152.90	1,299.10	1,000.70	573.20	574.70	492.30	334.50	567.50	548.10	586.60	643.40
2009	1,164.30	1,311.70	1,011.40	579.30	580.70	500.90	347.80	570.40	556.80	581.10	648.10

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: . . . = not applicable.

a. Aged 62 or older. Includes wives aged 65 or older with children.

b. Under age 65 with entitled children in their care.

CONTACT: Alberta Presberry (410) 966-8473 or supplement@ssa.gov.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D1—Number, percentage, and average monthly benefit, by year of entitlement as disabled worker and sex, December 2009

Year of entitlement	All disabled workers				Men				Women			
	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)
Total	7,788,013	100.0	...	1,064.30	4,100,400	100.0	...	1,189.40	3,687,613	100.0	...	925.20
<i>Summary data</i>												
2005–2009	2,748,358	35.3	...	1,144.20	1,461,878	35.7	...	1,290.70	1,286,480	34.9	...	977.70
2000–2004	2,412,657	31.0	...	1,099.80	1,210,971	29.5	...	1,247.50	1,201,686	32.6	...	951.00
1995–1999	1,200,105	15.4	...	976.40	594,109	14.5	...	1,092.40	605,996	16.4	...	862.80
1990–1994	795,336	10.2	...	925.70	430,515	10.5	...	1,015.30	364,821	9.9	...	820.10
1985–1989	335,293	4.3	...	897.90	203,602	5.0	...	961.90	131,691	3.6	...	798.90
1980–1984	160,960	2.1	...	861.40	107,337	2.6	...	907.60	53,623	1.5	...	769.00
1975–1979	91,401	1.2	...	1,119.30	60,925	1.5	...	1,163.80	30,476	0.8	...	1,030.40
1970–1974	38,156	0.5	...	942.00	26,518	0.6	...	964.40	11,638	0.3	...	891.00
Before 1970	5,747	0.1	...	788.00	4,545	0.1	...	797.10	1,202	^b	...	753.60
<i>Single-year data</i>												
2009	367,068	4.7	4.7	1,199.70	211,638	5.2	5.2	1,337.00	155,430	4.2	4.2	1,012.70
2008	565,964	7.3	12.0	1,157.10	310,032	7.6	12.7	1,295.60	255,932	6.9	11.2	989.30
2007	612,755	7.9	19.8	1,136.00	323,981	7.9	20.6	1,279.20	288,774	7.8	19.0	975.40
2006	611,349	7.8	27.7	1,127.00	315,215	7.7	28.3	1,277.90	296,134	8.0	27.0	966.20
2005	591,222	7.6	35.3	1,123.70	301,012	7.3	35.7	1,279.00	290,210	7.9	34.9	962.60
2004	577,233	7.4	42.7	1,129.50	292,256	7.1	42.8	1,286.20	284,977	7.7	42.6	968.80
2003	547,791	7.0	49.7	1,125.80	277,367	6.8	49.5	1,281.30	270,424	7.3	49.9	966.40
2002	499,739	6.4	56.2	1,103.20	251,229	6.1	55.7	1,251.60	248,510	6.7	56.7	953.30
2001	431,493	5.5	61.7	1,065.80	215,065	5.2	60.9	1,201.40	216,428	5.9	62.6	931.00
2000	356,401	4.6	66.3	1,048.30	175,054	4.3	65.2	1,180.20	181,347	4.9	67.5	920.90
1999	304,725	3.9	70.2	1,013.90	149,638	3.6	68.8	1,139.40	155,087	4.2	71.7	892.90
1998	258,715	3.3	73.5	975.00	126,725	3.1	71.9	1,092.40	131,990	3.6	75.3	862.30
1997	229,568	2.9	76.5	959.40	113,204	2.8	74.7	1,072.10	116,364	3.2	78.4	849.70
1996	211,386	2.7	79.2	956.30	105,990	2.6	77.3	1,067.00	105,396	2.9	81.3	845.10
1995	195,711	2.5	81.7	961.70	98,552	2.4	79.7	1,071.60	97,159	2.6	83.9	850.30
1994	183,014	2.3	84.0	956.10	93,513	2.3	82.0	1,060.60	89,501	2.4	86.3	846.80
1993	172,105	2.2	86.2	927.60	90,900	2.2	84.2	1,024.90	81,205	2.2	88.5	818.80
1992	164,336	2.1	88.3	915.00	89,852	2.2	86.4	1,004.00	74,484	2.0	90.6	807.70
1991	152,492	2.0	90.3	908.30	85,621	2.1	88.5	989.00	66,871	1.8	92.4	804.90
1990	123,389	1.6	91.9	914.00	70,629	1.7	90.2	989.30	52,760	1.4	93.8	813.30
1989	91,188	1.2	93.1	917.10	53,384	1.3	91.5	988.20	37,804	1.0	94.8	816.80
1988	73,170	0.9	94.0	914.20	43,537	1.1	92.5	985.00	29,633	0.8	95.6	810.20
1987	62,332	0.8	94.8	905.40	38,012	0.9	93.5	971.50	24,320	0.7	96.3	802.00
1986	57,396	0.7	95.5	875.20	35,978	0.9	94.3	933.50	21,418	0.6	96.9	777.20
1985	51,207	0.7	96.2	856.70	32,691	0.8	95.1	908.60	18,516	0.5	97.4	765.00
1984	45,101	0.6	96.8	842.60	29,361	0.7	95.9	891.00	15,740	0.4	97.8	752.30
1983	36,724	0.5	97.2	840.60	24,584	0.6	96.5	887.00	12,140	0.3	98.1	746.80
1982	29,794	0.4	97.6	844.20	20,064	0.5	96.9	889.90	9,730	0.3	98.4	749.90
1981	25,057	0.3	98.0	874.30	16,893	0.4	97.4	918.70	8,164	0.2	98.6	782.50
1980	24,284	0.3	98.3	935.60	16,435	0.4	97.8	978.30	7,849	0.2	98.8	846.10
1979	21,492	0.3	98.5	1,097.90	14,370	0.4	98.1	1,146.30	7,122	0.2	99.0	1,000.40
1978	18,936	0.2	98.8	1,194.80	12,391	0.3	98.4	1,244.50	6,545	0.2	99.2	1,100.90
1977	18,058	0.2	99.0	1,147.30	12,074	0.3	98.7	1,190.60	5,984	0.2	99.4	1,060.00
1976	17,352	0.2	99.2	1,097.40	11,610	0.3	99.0	1,143.40	5,742	0.2	99.5	1,004.40
1975	15,563	0.2	99.4	1,049.10	10,480	0.3	99.2	1,084.50	5,083	0.1	99.7	976.10

(Continued)

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D1—Number, percentage, and average monthly benefit, by year of entitlement as disabled worker and sex, December 2009—Continued

Year of entitlement	All disabled workers				Men				Women			
	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)
<i>Single-year data (cont.)</i>												
1974	13,044	0.2	99.6	987.00	8,774	0.2	99.5	1,017.80	4,270	0.1	99.8	923.80
1973	10,148	0.1	99.7	937.20	6,889	0.2	99.6	955.60	3,259	0.1	99.9	898.40
1972	5,956	0.1	99.8	932.80	4,184	0.1	99.7	958.20	1,772	b	99.9	872.80
1971	5,053	0.1	99.9	908.60	3,686	0.1	99.8	927.40	1,367	b	99.9	857.90
1970	3,955	0.1	99.9	862.40	2,985	0.1	99.9	882.20	970	b	100.0	801.50
1969	2,854	b	100.0	815.80	2,277	0.1	99.9	826.30	577	b	100.0	774.50
1968	2,719	b	100.0	756.00	2,124	0.1	100.0	764.60	595	b	100.0	725.30
1967	138	b	100.0	807.10	115	b	100.0	799.00	23	b	100.0	847.60
1966	28	b	100.0	973.50	23	b	100.0	897.50	5	b	100.0	1,323.20
1965	6	b	100.0	797.10	4	b	100.0	875.00	2	b	100.0	641.30

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

. . . = not applicable.

a. Represents those entitled in specified year or later.

b. Less than 0.05 percent.

CONTACT: Boris Shargorodsky (410) 965-2832 or supplement@ssa.gov.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D2—Number and percentage distribution, by monthly benefit and sex, December 2009

Monthly benefit (dollars)	Total		Men		Women	
	Number	Percent	Number	Percent	Number	Percent
All disabled workers	7,788,013	100.0	4,100,400	100.0	3,687,613	100.0
Less than 300.00	172,731	2.2	58,636	1.4	114,095	3.1
300.00–349.90	98,582	1.3	33,409	0.8	65,173	1.8
350.00–399.90	113,420	1.5	38,611	0.9	74,809	2.0
400.00–449.90	135,579	1.7	48,233	1.2	87,346	2.4
450.00–499.90	134,532	1.7	46,986	1.1	87,546	2.4
500.00–549.90	150,447	1.9	54,176	1.3	96,271	2.6
550.00–599.90	221,706	2.8	83,346	2.0	138,360	3.8
600.00–649.90	272,742	3.5	105,181	2.6	167,561	4.5
650.00–699.90	397,720	5.1	150,896	3.7	246,824	6.7
700.00–749.90	425,305	5.5	168,033	4.1	257,272	7.0
750.00–799.90	418,062	5.4	173,258	4.2	244,804	6.6
800.00–849.90	401,444	5.2	173,904	4.2	227,540	6.2
850.00–899.90	383,145	4.9	174,126	4.2	209,019	5.7
900.00–949.90	361,529	4.6	171,053	4.2	190,476	5.2
950.00–999.90	337,904	4.3	166,124	4.1	171,780	4.7
1,000.00–1,049.90	318,871	4.1	162,667	4.0	156,204	4.2
1,050.00–1,099.90	296,441	3.8	156,858	3.8	139,583	3.8
1,100.00–1,149.90	274,802	3.5	150,004	3.7	124,798	3.4
1,150.00–1,199.90	254,969	3.3	144,937	3.5	110,032	3.0
1,200.00–1,249.90	235,994	3.0	138,409	3.4	97,585	2.6
1,250.00–1,299.90	217,011	2.8	131,450	3.2	85,561	2.3
1,300.00–1,349.90	200,292	2.6	125,656	3.1	74,636	2.0
1,350.00–1,399.90	182,262	2.3	117,100	2.9	65,162	1.8
1,400.00–1,449.90	168,680	2.2	111,527	2.7	57,153	1.5
1,450.00–1,499.90	155,583	2.0	105,029	2.6	50,554	1.4
1,500.00–1,549.90	143,762	1.8	99,205	2.4	44,557	1.2
1,550.00–1,599.90	143,561	1.8	101,085	2.5	42,476	1.2
1,600.00–1,649.90	136,811	1.8	98,303	2.4	38,508	1.0
1,650.00–1,699.90	120,737	1.6	88,377	2.2	32,360	0.9
1,700.00–1,749.90	111,004	1.4	82,562	2.0	28,442	0.8
1,750.00–1,799.90	102,489	1.3	77,037	1.9	25,452	0.7
1,800.00–1,849.90	101,963	1.3	77,274	1.9	24,689	0.7
1,850.00–1,899.90	121,148	1.6	93,011	2.3	28,137	0.8
1,900.00–1,949.90	105,071	1.3	82,708	2.0	22,363	0.6
1,950.00–1,999.90	85,434	1.1	68,799	1.7	16,635	0.5
2,000.00 or more	286,280	3.7	242,430	5.9	43,850	1.2
Average benefit (dollars)	1,064.30		1,189.40		925.20	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

CONTACT: Boris Shargorodsky (410) 965-2832 or supplement@ssa.gov.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D3—Number and total monthly benefits, by sex, December 1957–2009, selected years

Year	All disabled workers		Men		Women	
	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)
1957	149,850	10,904	121,172	8,903	28,678	2,001
1958	237,719	19,516	189,883	16,138	47,836	3,378
1959	334,443	29,765	264,201	24,417	70,242	5,348
1960	455,371	40,668	356,277	33,034	99,094	7,633
1965	988,074	96,599	734,047	74,946	254,027	21,656
1970	1,492,948	196,010	1,068,986	148,194	423,962	47,819
1975	2,488,774	562,180	1,710,923	418,013	777,851	144,167
1980	2,858,680	1,059,792	1,928,030	784,266	930,650	275,525
1985	2,656,638	1,285,375	1,784,750	953,156	871,888	332,219
1986	2,728,463	1,331,144	1,826,835	985,003	901,628	346,141
1987	2,785,859	1,415,811	1,857,172	1,044,647	928,687	371,165
1988	2,830,284	1,498,637	1,876,878	1,101,675	953,406	396,962
1989	2,895,364	1,609,780	1,906,379	1,176,403	988,985	433,376
1990	3,011,294	1,768,313	1,967,408	1,283,579	1,043,886	484,735
1991	3,194,938	1,946,823	2,067,777	1,401,006	1,127,161	545,817
1992	3,467,783	2,171,080	2,219,789	1,546,924	1,247,994	624,156
1993	3,725,966	2,390,829	2,357,332	1,685,025	1,368,634	705,804
1994	3,962,954	2,620,982	2,473,061	1,824,195	1,489,893	796,787
1995	4,185,263	2,853,365	2,568,359	1,956,168	1,616,904	897,197
1996	4,385,623	3,087,223	2,644,454	2,083,123	1,741,169	1,004,100
1997	4,508,134	3,252,919	2,666,486	2,158,017	1,841,648	1,094,902
1998	4,698,319	3,444,259	2,737,296	2,252,129	1,961,023	1,192,130
1999	4,879,455	3,679,691	2,801,163	2,371,141	2,078,292	1,308,550
2000	5,042,334	3,965,304	2,856,411	2,521,252	2,185,923	1,444,052
2001	5,274,183	4,295,600	2,951,833	2,697,162	2,322,350	1,598,438
2002	5,543,981	4,625,445	3,070,001	2,872,308	2,473,980	1,753,137
2003	5,873,673	5,060,493	3,224,624	3,114,704	2,649,049	1,945,789
2004	6,198,271	5,542,045	3,373,723	3,381,312	2,824,548	2,160,733
2005	6,518,989	6,114,705	3,517,259	3,697,352	3,001,730	2,417,352
2006	6,806,918	6,655,048	3,643,121	3,998,054	3,163,797	2,656,994
2007	7,098,723	7,127,082	3,773,912	4,249,072	3,324,811	2,878,010
2008	7,426,691	7,895,536	3,924,524	4,672,826	3,502,167	3,222,710
2009	7,788,013	8,288,762	4,100,400	4,877,052	3,687,613	3,411,709

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

CONTACT: Boris Shargorodsky (410) 965-2832 or supplement@ssa.gov.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D4—Number, average age, and percentage distribution, by sex and age, December 1957–2009, selected years

Year	Number (thousands)	Average age	Percentage distribution							
			Total, all ages	Under 30	30–39	40–44	45–49	50–54	55–59	60–FRA
<i>Men</i>										
1957	121	59.4	100.0	...	...	...	...	18.5	29.9	51.6
1958	190	59.5	100.0	...	...	...	...	18.2	29.7	52.1
1959	264	59.3	100.0	...	...	...	...	19.0	30.7	50.3
1960	356	57.3	100.0	0.5	3.3	3.0	4.9	16.6	26.7	44.9
1965	734	54.4	100.0	1.0	7.5	7.6	10.4	15.4	24.7	33.3
1970	1,069	53.9	100.0	3.3	6.8	6.9	10.9	15.2	23.2	33.7
1975	1,711	53.5	100.0	4.6	7.5	6.2	9.7	15.8	23.2	33.0
1980	1,928	52.9	100.0	4.1	9.6	6.0	8.9	14.3	24.0	33.1
1985	1,785	51.9	100.0	4.6	12.3	7.3	8.6	12.9	21.4	32.9
1986	1,827	51.4	100.0	4.9	13.3	7.9	8.9	12.7	20.7	31.5
1987	1,857	51.1	100.0	4.8	13.8	8.5	9.4	12.5	20.1	30.8
1988	1,869	50.9	100.0	4.7	14.3	9.0	9.8	12.7	19.6	29.9
1989	1,906	50.7	100.0	4.5	14.7	9.6	10.3	12.7	19.4	28.8
1990	1,965	50.4	100.0	4.5	15.2	10.3	10.7	12.7	19.1	27.5
1991	2,066	50.1	100.0	4.5	15.6	10.7	11.2	13.0	18.6	26.4
1992	2,221	49.9	100.0	4.6	16.0	11.0	12.0	13.4	18.0	25.0
1993	2,358	49.6	100.0	4.6	16.2	11.2	12.3	13.9	17.9	23.9
1994	2,476	49.6	100.0	4.3	16.1	11.4	12.8	14.2	17.8	23.4
1995	2,573	49.7	100.0	4.0	15.5	11.5	13.4	14.5	18.0	23.2
1996	2,650	49.9	100.0	3.6	14.8	11.6	13.7	15.0	18.3	22.9
1997	2,671	50.2	100.0	3.3	13.9	11.6	13.6	15.7	18.9	23.0
1998	2,741	50.5	100.0	3.1	13.3	11.6	13.7	16.1	19.4	22.9
1999	2,802	50.6	100.0	2.9	12.6	11.6	13.8	16.7	19.7	22.9
2000	2,857	50.7	100.0	2.8	11.8	11.5	13.9	17.3	20.0	22.8
2001	2,952	50.9	100.0	2.9	11.2	11.1	14.0	17.4	20.5	23.0
2002	3,069	51.0	100.0	3.1	10.5	10.7	14.0	17.2	21.1	23.3
2003	3,226	51.3	100.0	3.2	9.9	10.4	13.8	17.1	21.4	24.2
2004	3,373	51.6	100.0	3.2	9.4	9.9	13.8	17.0	21.8	24.9
2005	3,517	51.9	100.0	3.2	8.9	9.4	13.5	17.0	22.4	25.7
2006	3,643	52.2	100.0	3.1	8.5	8.9	13.2	17.0	22.4	27.0
2007	3,774	52.5	100.0	3.1	8.2	8.3	12.8	17.0	21.9	28.6
2008	3,925	52.7	100.0	3.1	8.1	7.9	12.4	17.1	21.7	29.8
2009	4,100	52.8	100.0	3.1	8.1	7.5	12.2	17.2	21.8	30.1

(Continued)

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D4—Number, average age, and percentage distribution, by sex and age, December 1957–2009, selected years—Continued

Year	Number (thousands)	Average age	Percentage distribution							
			Total, all ages	Under 30	30–39	40–44	45–49	50–54	55–59	60–FRA
<i>Women</i>										
1957	29	57.9	100.0	...	...	...	...	25.6	39.2	35.2
1958	48	58.2	100.0	...	...	...	...	23.8	37.5	38.6
1959	70	58.4	100.0	...	...	...	...	23.4	36.8	39.7
1960	99	56.7	100.0	0.3	3.2	3.2	5.3	19.4	31.4	37.2
1965	254	55.2	100.0	0.6	5.4	6.3	9.8	16.2	27.3	34.3
1970	424	55.0	100.0	1.9	5.1	5.6	10.1	15.9	26.0	35.3
1975	778	54.4	100.0	3.3	6.1	5.3	9.0	16.3	25.5	34.5
1980	931	53.7	100.0	3.4	8.2	5.3	8.2	14.4	25.4	35.0
1985	872	52.6	100.0	3.8	11.2	6.9	8.3	12.9	22.3	34.6
1986	902	52.0	100.0	4.1	12.1	7.6	8.8	12.9	21.6	32.9
1987	929	51.7	100.0	4.2	12.7	8.2	9.4	12.9	20.9	31.7
1988	952	51.4	100.0	4.0	13.1	8.7	9.9	13.2	20.6	30.5
1989	989	51.1	100.0	4.0	13.5	9.2	10.6	13.4	20.1	29.2
1990	1,046	50.8	100.0	3.9	14.0	9.8	11.1	13.4	19.9	27.9
1991	1,133	50.5	100.0	4.0	14.3	10.3	11.6	13.8	19.4	26.5
1992	1,252	50.1	100.0	4.3	14.6	10.7	12.2	14.3	18.8	25.0
1993	1,371	49.9	100.0	4.3	14.9	11.0	12.6	14.8	18.9	23.5
1994	1,491	49.9	100.0	4.1	14.8	11.2	13.1	15.3	18.7	22.8
1995	1,614	49.9	100.0	3.8	14.5	11.5	13.6	15.7	18.8	22.2
1996	1,736	50.0	100.0	3.4	14.1	11.6	13.9	16.2	19.0	21.7
1997	1,835	50.2	100.0	3.1	13.3	11.6	14.0	16.8	19.6	21.5
1998	1,956	50.5	100.0	3.0	12.8	11.5	14.2	17.0	20.0	21.6
1999	2,071	50.5	100.0	2.8	12.1	11.5	14.3	17.5	20.4	21.5
2000	2,179	50.7	100.0	2.7	11.5	11.3	14.5	17.9	20.7	21.5
2001	2,313	50.8	100.0	2.7	11.1	11.1	14.4	18.0	21.1	21.6
2002	2,467	50.9	100.0	2.7	10.6	10.8	14.4	17.8	21.5	22.1
2003	2,642	51.2	100.0	3.0	10.1	10.4	14.2	17.7	21.5	23.1
2004	2,819	51.5	100.0	3.0	9.7	10.0	14.1	17.6	21.8	23.8
2005	2,993	51.7	100.0	2.9	9.2	9.6	13.8	17.7	22.3	24.5
2006	3,164	52.0	100.0	2.8	9.0	9.2	13.5	17.6	22.2	25.7
2007	3,325	52.3	100.0	2.7	8.8	8.7	13.2	17.6	21.8	27.2
2008	3,502	52.5	100.0	2.6	8.6	8.2	12.9	17.6	21.7	28.3
2009	3,688	52.6	100.0	2.6	8.6	7.9	12.7	17.7	22.0	28.4

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1988 and 1990–2005 are based on a 10 percent sample. All other years are 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

FRA = full retirement age.

... = not applicable.

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5.E OASDI Current-Pay Benefits: Disabled Workers and Dependents

Table 5.E1—Number and percentage distribution, by primary insurance amount and type of benefit, December 2009

Primary insurance amount (dollars)	Disabled workers		Spouses		Children	
	Number	Percent	Number	Percent	Number	Percent
Total	7,788,013	100.0	158,122	100.0	1,747,979	100.0
Less than 300.00	162,081	2.1	60	a	303	a
300.00–349.90	96,918	1.2	36	a	241	a
350.00–399.90	111,566	1.4	38	a	300	a
400.00–449.90	133,338	1.7	101	0.1	850	a
450.00–499.90	131,964	1.7	71	a	501	a
500.00–549.90	147,605	1.9	91	0.1	1,045	0.1
550.00–599.90	219,327	2.8	493	0.3	8,726	0.5
600.00–649.90	269,843	3.5	1,398	0.9	28,846	1.7
650.00–699.90	396,087	5.1	2,766	1.7	67,123	3.8
700.00–749.90	424,077	5.4	4,389	2.8	126,027	7.2
750.00–799.90	417,463	5.4	5,154	3.3	129,088	7.4
800.00–849.90	402,186	5.2	5,715	3.6	124,503	7.1
850.00–899.90	381,863	4.9	5,898	3.7	117,237	6.7
900.00–949.90	361,749	4.6	6,032	3.8	109,406	6.3
950.00–999.90	338,191	4.3	5,907	3.7	101,778	5.8
1,000.00–1,049.90	320,014	4.1	5,890	3.7	95,377	5.5
1,050.00–1,099.90	296,689	3.8	5,778	3.7	86,357	4.9
1,100.00–1,149.90	275,998	3.5	5,373	3.4	78,248	4.5
1,150.00–1,199.90	256,533	3.3	5,295	3.3	71,529	4.1
1,200.00–1,249.90	236,980	3.0	5,069	3.2	64,253	3.7
1,250.00–1,299.90	218,254	2.8	4,941	3.1	57,447	3.3
1,300.00–1,349.90	202,173	2.6	4,692	3.0	51,951	3.0
1,350.00–1,399.90	183,906	2.4	4,603	2.9	46,337	2.7
1,400.00–1,449.90	170,159	2.2	4,562	2.9	41,069	2.3
1,450.00–1,499.90	156,860	2.0	4,448	2.8	36,854	2.1
1,500.00–1,549.90	145,078	1.9	4,354	2.8	32,339	1.9
1,550.00–1,599.90	144,667	1.9	4,662	2.9	31,008	1.8
1,600.00–1,649.90	138,573	1.8	4,804	3.0	28,667	1.6
1,650.00–1,699.90	121,897	1.6	4,630	2.9	24,623	1.4
1,700.00–1,749.90	111,654	1.4	4,595	2.9	22,697	1.3
1,750.00–1,799.90	103,420	1.3	4,581	2.9	20,801	1.2
1,800.00–1,849.90	102,368	1.3	4,773	3.0	20,756	1.2
1,850.00–1,899.90	122,883	1.6	6,056	3.8	24,269	1.4
1,900.00–1,949.90	107,322	1.4	5,702	3.6	21,182	1.2
1,950.00–1,999.90	86,960	1.1	5,011	3.2	16,437	0.9
2,000.00 or more	291,367	3.7	20,154	12.7	59,804	3.4
Average primary insurance amount (dollars)	1,069.30		1,416.20		1,129.70	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

a. Less than 0.05 percent.

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5.E OASDI Current-Pay Benefits: Disabled Workers and Dependents

Table 5.E2—Average monthly benefit, by type of benefit, sex, and age, December 1957–2009, selected years (in dollars)

Year	Disabled workers			Spouses		Children			
	All	Men	Women	Wives	Husbands	All	Under age 18	Disabled adult children	Students
1957	72.80	73.50	69.80	...	...	...	...	...	...
1958	82.10	85.00	70.60	34.00	33.90	27.30	27.30	38.50	...
1959	89.00	92.40	76.10	36.10	34.70	31.00	30.80	39.40	...
1960	89.30	92.70	77.00	34.40	34.70	30.20	30.00	39.00	...
1965	97.80	102.10	85.30	35.00	32.60	31.60	30.90	41.60	49.30
1970	131.30	138.60	112.80	42.60	42.40	38.60	36.90	53.30	54.10
1975	225.90	244.30	185.30	67.40	61.70	62.00	58.60	84.10	86.90
1980	370.70	406.80	296.10	110.60	91.80	110.30	104.60	136.00	152.40
1985	483.80	534.10	381.00	132.70	102.70	141.80	138.90	183.80	196.90
1990	587.20	652.40	464.40	151.30	96.90	163.80	158.80	231.40	250.00
1991	609.40	677.50	484.20	154.60	101.70	167.90	162.70	240.90	253.20
1992	626.10	696.90	500.10	156.40	106.00	170.20	165.10	246.80	262.00
1993	641.70	714.80	515.70	157.50	108.60	173.10	167.70	253.30	265.90
1994	661.40	731.60	534.80	161.00	112.60	177.70	172.20	261.50	273.80
1995	681.80	761.60	554.90	165.00	116.60	183.50	177.90	270.10	284.10
1996	703.90	787.70	576.70	172.60	124.50	193.50	187.70	281.70	295.00
1997	721.60	809.30	594.50	178.00	129.10	201.20	195.20	292.20	306.30
1998	733.10	822.80	607.90	183.00	136.50	207.50	201.40	300.20	313.10
1999	754.10	846.50	629.60	190.20	145.40	216.10	209.50	310.70	319.80
2000	786.40	882.70	660.60	199.50	155.90	227.60	220.80	325.60	336.00
2001	814.50	913.70	688.30	208.20	164.50	237.90	230.70	339.90	343.50
2002	834.30	935.60	708.60	213.70	168.50	245.00	237.40	349.10	350.10
2003	861.60	965.90	734.50	222.70	176.90	253.90	245.90	360.90	359.10
2004	894.10	1,002.20	765.00	232.90	186.10	264.90	256.90	376.10	367.80
2005	938.00	1,051.20	805.30	247.70	197.70	278.90	270.20	394.60	387.10
2006	977.70	1,097.40	839.80	259.40	208.40	290.40	281.30	410.10	400.50
2007	1,004.00	1,125.90	865.60	268.80	215.00	299.00	289.10	419.90	410.60
2008	1,063.10	1,190.70	920.20	287.60	229.40	317.60	306.60	441.50	436.00
2009	1,064.30	1,189.40	925.20	288.60	234.60	317.90	306.80	441.80	428.70

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: ... = not applicable.

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5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F1—Number of wives and husbands and total monthly benefits, by type of benefit, December 1950–2009, selected years

Year	Total		Wives entitled solely because of age ^a		Wives entitled because of children ^b						Husbands	
					Subtotal		With at least 1 child under age 16 ^c		With at least 1 disabled child ^d			
	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)
<i>Wives and husbands of retired workers</i>												
1950	508,350	11,995	498,688	11,865	8,865	114	8,865	114	...	...	797	16
1955	1,191,963	39,416	1,124,616	37,826	57,284	1,315	57,284	1,315	...	...	10,063	274
1960	2,269,384	87,867	2,143,949	84,018	110,909	3,344	101,774	3,010	9,135	334	14,526	504
1965	2,613,550	114,035	2,433,602	108,069	168,951	5,508	154,829	4,947	14,122	561	10,997	458
1970	2,668,105	163,263	2,491,724	155,510	167,968	7,261	154,919	6,542	13,049	719	8,413	492
1975	2,867,388	301,623	2,664,132	287,043	195,993	13,861	178,909	12,391	17,084	1,470	7,263	720
1980	3,015,549	518,500	2,789,472	490,818	186,894	22,508	167,793	19,708	19,101	2,800	39,183	5,174
1985	3,069,067	755,844	2,926,300	732,464	107,166	17,347	84,074	12,762	23,092	4,585	35,601	6,033
1986	3,086,091	776,870	2,948,854	754,026	102,549	16,933	79,471	12,304	23,078	4,629	34,688	5,911
1987	3,089,968	817,058	2,959,301	794,258	96,928	16,865	74,141	12,078	22,787	4,788	33,739	5,935
1988	3,086,022	854,644	2,959,856	831,659	93,577	17,071	71,585	12,266	21,992	4,805	32,589	5,914
1989	3,093,075	905,281	2,971,440	881,836	89,839	17,431	68,857	12,571	20,982	4,859	31,796	6,014
1990	3,101,085	964,983	2,982,034	940,514	87,925	18,300	67,785	13,322	20,140	4,977	31,126	6,169
1991	3,104,235	1,008,672	2,986,975	983,434	86,682	19,020	66,992	13,897	19,690	5,122	30,578	6,218
1992	3,111,515	1,047,553	2,995,629	1,021,616	85,680	19,648	66,618	14,468	19,062	5,180	30,206	6,289
1993	3,094,447	1,075,073	2,980,671	1,048,712	83,751	19,993	65,225	14,782	18,526	5,211	30,025	6,368
1994	3,066,430	1,101,203	2,954,950	1,074,452	81,644	20,296	63,575	15,033	18,069	5,263	29,836	6,455
1995	3,026,012	1,120,924	2,917,764	1,094,203	78,507	20,155	61,132	14,932	17,375	5,223	29,741	6,567
1996	2,970,226	1,139,092	2,872,316	1,113,470	68,310	18,942	52,384	13,874	15,926	5,068	29,600	6,680
1997	2,922,170	1,148,558	2,828,261	1,123,381	64,123	18,363	49,372	13,540	14,751	4,823	29,786	6,814
1998	2,864,230	1,145,353	2,773,583	1,120,553	60,634	17,883	46,649	13,205	13,985	4,678	30,013	6,917
1999	2,811,008	1,155,479	2,722,244	1,130,413	58,229	17,905	45,002	13,333	13,227	4,572	30,535	7,161
2000	2,798,203	1,200,835	2,707,444	1,173,771	58,416	19,212	45,680	14,547	12,736	4,665	32,343	7,851
2001	2,741,962	1,213,842	2,652,289	1,186,078	55,995	19,335	44,009	14,732	11,986	4,603	33,678	8,429
2002	2,681,153	1,210,108	2,591,336	1,181,531	54,683	19,579	43,212	15,022	11,471	4,557	35,143	8,998
2003	2,621,691	1,214,103	2,532,377	1,184,720	52,791	19,774	42,023	15,301	10,768	4,473	36,523	9,609
2004	2,568,853	1,227,331	2,480,652	1,197,209	49,947	19,681	40,122	15,378	9,825	4,303	38,254	10,441
2005	2,526,459	1,260,857	2,439,582	1,229,775	46,766	19,602	37,543	15,315	9,223	4,287	40,111	11,479
2006	2,478,599	1,282,860	2,391,928	1,250,678	44,597	19,632	35,847	15,344	8,750	4,287	42,074	12,550
2007	2,432,082	1,292,620	2,345,674	1,259,718	42,159	19,252	34,025	15,131	8,134	4,122	44,249	13,649
2008	2,370,611	1,347,716	2,282,698	1,311,855	40,884	20,129	33,079	15,847	7,805	4,282	47,029	15,732
2009	2,343,601	1,345,643	2,250,741	1,307,001	41,443	20,758	33,632	16,379	7,811	4,378	51,417	17,885

(Continued)

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F1—Number of wives and husbands and total monthly benefits, by type of benefit, December 1950–2009, selected years—Continued

Year	Total		Wives entitled solely because of age ^a		Wives entitled because of children ^b					Husbands		
					Subtotal		With at least 1 child under age 16 ^c		With at least 1 disabled child ^d			
	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)
Wives and husbands of disabled workers												
1958	12,231	415	4,845	192	7,370	223	7,345	222	25	1	16	1
1960	76,599	2,636	21,845	841	54,543	1,788	53,549	1,746	994	42	211	7
1965	193,362	6,761	29,352	1,109	163,500	5,635	160,922	5,512	2,578	123	510	17
1970	283,447	12,060	41,582	2,063	241,341	9,975	235,892	9,667	5,449	307	524	22
1975	452,922	30,536	64,883	5,263	387,474	25,239	380,763	24,633	6,711	606	565	35
1980	461,878	51,028	77,276	9,672	382,457	41,159	374,147	40,018	8,310	1,142	2,145	197
1985	305,532	40,507	79,294	12,693	224,704	27,656	215,012	26,055	9,692	1,602	1,534	158
1986	300,826	39,481	78,925	12,766	220,426	26,566	210,515	24,952	9,911	1,614	1,475	149
1987	290,888	39,195	73,484	12,808	211,222	25,854	201,280	24,194	9,942	1,661	6,182	532
1988	280,821	38,878	70,654	12,924	203,788	25,402	194,068	23,746	9,720	1,656	6,379	552
1989	271,488	39,148	67,154	12,974	197,946	25,590	188,562	23,916	9,384	1,674	6,388	584
1990	265,890	39,869	63,584	13,018	195,818	26,222	186,641	24,506	9,177	1,716	6,488	629
1991	266,219	40,792	60,866	13,020	198,457	27,071	189,401	25,321	9,056	1,750	6,896	701
1992	270,674	41,951	59,536	13,196	203,703	27,967	194,459	26,152	9,244	1,815	7,435	788
1993	272,759	42,570	58,052	13,241	206,975	28,490	197,589	26,616	9,386	1,874	7,732	839
1994	271,054	43,263	56,343	13,367	206,854	29,011	197,492	27,094	9,362	1,917	7,857	885
1995	263,539	43,105	53,882	13,300	201,827	28,892	192,573	26,962	9,254	1,929	7,830	913
1996	223,854	38,366	51,779	13,251	166,586	24,432	158,106	22,597	8,480	1,834	5,489	683
1997	206,959	36,585	51,265	13,251	150,647	22,683	142,717	20,928	7,930	1,755	5,047	651
1998	189,843	34,530	50,759	13,197	134,584	20,718	127,083	19,032	7,501	1,686	4,500	614
1999	176,299	33,336	50,165	13,314	121,906	19,407	114,842	17,781	7,064	1,626	4,228	615
2000	165,123	32,763	49,171	13,488	111,933	18,649	105,248	17,044	6,685	1,605	4,019	626
2001	156,899	32,491	48,597	13,794	104,271	18,034	97,942	16,460	6,329	1,574	4,031	663
2002	151,614	32,209	48,402	13,970	99,075	17,542	93,034	16,008	6,041	1,533	4,137	697
2003	150,886	33,401	51,536	15,304	95,042	17,335	89,168	15,808	5,874	1,527	4,308	762
2004	152,804	35,378	57,891	17,437	90,407	17,103	84,885	15,608	5,522	1,494	4,506	838
2005	153,800	37,865	63,069	19,930	86,029	17,006	80,644	15,482	5,385	1,523	4,702	930
2006	153,470	39,563	67,445	21,934	81,122	16,607	75,917	15,069	5,205	1,538	4,903	1,022
2007	152,802	40,791	71,212	23,591	76,415	16,087	71,372	14,554	5,043	1,533	5,175	1,113
2008	154,230	44,030	76,035	26,501	72,668	16,261	67,851	14,696	4,817	1,565	5,527	1,268
2009	158,122	45,306	79,969	27,759	72,083	16,124	67,252	14,558	4,831	1,566	6,070	1,424

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

- a. Aged 62 or older. Includes wives aged 65 or older with children.
- b. Under age 65 with entitled children in their care.
- c. Prior to August 1981, benefits were payable to mothers and fathers caring for a child under age 18. For mothers and fathers caring for a child who was at least age 14 and who were entitled in August 1981, benefits were continued until the child attained age 18 or September 1983, whichever came earlier.
- d. Excludes wives with both disabled and nondisabled children in their care.

CONTACT: Karyn Foley (410) 965-9047 or supplement@ssa.gov.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F3—Percentage distribution of wives with entitlement based on age, by monthly benefit and age, December 2009

Monthly benefit (dollars)	Total, 62 or older	62–64	65–69	70–74	75–79	80–84	85 or older
Total							
Number	2,330,710	248,041	625,282	554,341	454,852	296,826	151,368
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 150.00	5.1	11.9	6.1	4.4	3.4	2.8	2.3
150.00–174.90	1.4	2.4	1.6	1.2	1.0	0.9	1.0
175.00–199.90	1.3	2.3	1.6	1.2	1.0	0.9	0.9
200.00–224.90	1.5	2.4	1.7	1.4	1.3	1.2	1.1
225.00–249.90	1.8	3.0	2.0	1.7	1.5	1.4	1.2
250.00–274.90	1.9	3.2	2.1	1.8	1.6	1.5	1.4
275.00–299.90	2.1	3.1	2.2	2.0	1.8	1.8	1.7
300.00–324.90	2.1	2.9	2.2	2.0	1.9	1.8	1.7
325.00–349.90	2.1	2.8	2.2	2.1	1.9	1.8	1.8
350.00–374.90	2.1	2.7	2.2	2.1	2.0	2.0	1.9
375.00–399.90	2.2	2.6	2.2	2.2	2.1	2.1	2.1
400.00–424.90	2.3	2.6	2.2	2.3	2.3	2.3	2.3
425.00–449.90	2.4	2.5	2.3	2.4	2.5	2.5	2.6
450.00–474.90	2.6	2.6	2.3	2.6	2.7	2.9	3.0
475.00–499.90	2.8	2.6	2.4	2.7	3.1	3.2	3.7
500.00–524.90	3.2	2.6	2.6	3.0	3.4	4.0	4.9
525.00–549.90	3.8	2.6	2.7	3.3	4.0	5.6	8.1
550.00–574.90	4.3	2.8	3.0	3.5	4.8	7.5	7.9
575.00–599.90	5.2	2.8	3.3	4.7	7.2	9.0	6.0
600.00–624.90	6.1	2.8	3.6	6.5	9.6	8.6	5.4
625.00–649.90	5.6	3.1	3.9	7.0	8.5	5.3	3.9
650.00–674.90	4.9	4.5	4.5	6.4	5.3	3.4	3.6
675.00–699.90	4.2	4.7	4.7	5.0	3.3	2.9	3.5
700.00–724.90	3.7	4.7	4.6	3.7	2.6	2.7	3.5
725.00–749.90	3.4	4.7	4.4	3.0	2.2	2.6	3.4
750.00–774.90	3.2	4.6	4.2	2.6	2.1	2.5	3.5
775.00–799.90	2.9	3.9	3.3	2.3	2.2	2.7	3.4
800.00–824.90	2.4	2.8	2.4	2.2	2.2	2.5	3.3
825.00–849.90	2.0	1.4	2.0	2.0	1.9	2.3	2.3
850.00 or more	11.1	2.3	15.4	12.6	10.4	9.1	8.5
Average benefit (dollars)	572.70	480.30	588.10	584.20	578.80	578.00	589.30

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

CONTACT: Karyn Foley (410) 965-9047 or supplement@ssa.gov.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F4—Number of children and total monthly benefits, by type of benefit, December 1940–2009, selected years

Year	Number of children of—				Total monthly benefits for children of— (thousands of dollars)			
	All workers	Retired workers	Deceased workers	Disabled workers	All workers	Retired workers	Deceased workers	Disabled workers
Total								
1957	1,502,077	179,697	1,322,380	...	57,951	3,932	54,019	...
1960	2,000,451	268,168	1,576,802	155,481	93,276	7,576	81,003	4,697
1965	3,092,659	460,781	2,074,263	557,615	159,428	14,736	127,067	17,627
1970	4,122,305	545,708	2,687,997	888,600	279,845	24,473	221,041	34,330
1980	4,606,517	638,711	2,609,920	1,357,886	864,242	89,386	625,090	149,766
1990	3,187,010	422,200	1,776,013	988,797	991,628	109,497	720,206	161,926
1995	3,734,097	441,600	1,883,643	1,408,854	1,283,288	141,974	882,837	258,477
2000	3,802,863	458,951	1,878,007	1,465,905	1,547,808	181,177	1,033,055	333,575
2001	3,839,381	467,064	1,890,156	1,482,161	1,624,285	192,727	1,078,886	352,672
2002	3,910,256	476,684	1,907,899	1,525,673	1,692,471	203,265	1,115,415	373,791
2003	3,960,909	480,033	1,909,983	1,570,893	1,763,910	213,230	1,151,907	398,773
2004	3,986,319	482,894	1,904,631	1,598,794	1,838,926	224,538	1,190,871	423,518
2005	4,024,815	488,425	1,903,477	1,632,913	1,945,508	240,777	1,249,328	455,402
2006	4,040,530	489,940	1,898,862	1,651,728	2,031,723	253,820	1,298,187	479,716
2007	4,050,691	494,296	1,891,706	1,664,689	2,095,892	265,936	1,332,248	497,708
2008	4,131,594	525,197	1,914,524	1,691,873	2,262,489	298,072	1,427,099	537,318
2009	4,230,578	561,451	1,921,148	1,747,979	2,311,770	320,237	1,435,847	555,686
Children under age 18								
1940	54,648	6,410	48,238	...	668	62	606	...
1950	699,703	46,241	653,462	...	19,366	788	18,578	...
1960	1,896,397	214,343	1,529,535	152,519	88,682	5,654	78,446	4,582
1965	2,688,592	339,507	1,816,888	532,197	135,432	9,598	109,392	16,442
1970	3,314,578	354,373	2,161,094	799,111	215,366	13,367	172,499	29,500
1980	3,423,081	354,797	1,883,438	1,184,846	607,574	40,548	443,097	123,930
1990	2,497,252	236,051	1,333,690	927,511	739,787	53,944	538,546	147,296
1995	2,956,482	241,756	1,386,111	1,328,615	943,028	69,312	637,326	236,390
2000	2,976,406	255,908	1,346,091	1,374,407	1,120,977	92,987	724,567	303,423
2001	2,993,852	262,509	1,345,986	1,385,357	1,172,169	100,320	752,216	319,633
2002	3,043,029	270,231	1,350,533	1,422,265	1,218,610	107,298	773,661	337,652
2003	3,080,308	273,646	1,345,029	1,461,633	1,268,682	113,784	795,476	359,422
2004	3,104,055	277,195	1,338,920	1,487,940	1,325,370	121,320	821,844	382,206
2005	3,129,506	281,634	1,331,531	1,516,341	1,399,043	131,142	858,135	409,766
2006	3,133,398	282,281	1,320,862	1,530,255	1,455,066	138,296	886,393	430,377
2007	3,119,523	281,848	1,302,665	1,535,010	1,487,902	143,616	900,537	443,748
2008	3,118,230	285,944	1,280,182	1,552,104	1,576,703	156,733	944,058	475,912
2009	3,158,138	301,132	1,258,817	1,598,189	1,592,358	167,672	934,400	490,286
Disabled adult children								
1957	28,869	16,686	12,183	...	1,115	526	589	...
1960	104,054	53,825	47,267	2,962	4,594	1,922	2,557	115
1965	198,390	87,122	102,287	8,981	10,271	3,541	6,357	374
1970	270,557	101,341	154,921	14,295	19,807	5,755	13,290	761
1980	450,169	140,548	276,738	32,883	89,561	22,463	62,625	4,473
1990	600,480	173,941	389,385	37,154	217,201	51,879	156,725	8,597
1995	686,101	188,965	446,377	50,759	300,007	68,743	217,553	13,711
2000	728,689	191,584	480,351	56,754	377,647	83,098	276,072	18,478
2001	736,546	191,809	486,817	57,920	395,952	86,510	289,757	19,684
2002	744,529	192,085	492,985	59,459	409,813	89,114	299,946	20,754
2003	752,814	191,704	498,659	62,451	426,877	92,125	312,212	22,540
2004	759,264	191,285	503,242	64,737	446,134	95,744	326,042	24,349
2005	768,535	191,979	507,961	68,595	473,620	101,440	345,113	27,067
2006	776,596	192,122	512,596	71,878	498,891	106,512	362,902	29,477
2007	794,677	196,038	521,293	77,346	524,763	112,420	379,869	32,474
2008	871,466	221,943	564,735	84,788	594,115	130,201	426,482	37,432
2009	920,883	241,042	589,575	90,266	622,827	140,072	442,872	39,882

(Continued)

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F4—Number of children and total monthly benefits, by type of benefit, December 1940–2009, selected years—Continued

Year	Number of children of—				Total monthly benefits for children of— (thousands of dollars)			
	All workers	Retired workers	Deceased workers	Disabled workers	All workers	Retired workers	Deceased workers	Disabled workers
<i>Students</i>								
1965	205,677	34,152	155,088	16,437	13,725	1,597	11,318	811
1970	537,170	89,994	371,982	75,194	44,672	5,351	35,252	4,069
1980	733,267	143,366	449,744	140,157	167,107	26,375	119,368	21,363
1990	89,278	12,208	52,938	24,132	34,641	3,673	24,935	6,033
1995	91,514	10,879	51,155	29,480	40,253	3,919	27,958	8,376
2000	97,768	11,459	51,565	34,744	49,184	5,092	32,417	11,674
2001	108,983	12,746	57,353	38,884	56,164	5,897	36,912	13,356
2002	122,698	14,368	64,381	43,949	64,048	6,854	41,808	15,386
2003	127,787	14,683	66,295	46,809	68,351	7,321	44,218	16,811
2004	123,000	14,414	62,469	46,117	67,422	7,474	42,985	16,963
2005	126,774	14,812	63,985	47,977	72,845	8,196	46,080	18,570
2006	130,536	15,537	65,404	49,595	77,766	9,012	48,892	19,862
2007	136,491	16,410	67,748	52,333	83,228	9,900	51,842	21,486
2008	141,898	17,310	69,607	54,981	91,670	11,138	56,559	23,973
2009	151,557	19,277	72,756	59,524	96,585	12,493	58,575	25,517

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

CONTACT: Karyn Foley (410) 965-9047 or supplement@ssa.gov.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F6—Average monthly benefit for survivors, by type of benefit, December 1940–2009, selected years (in dollars)

Year	Widowed mothers and fathers	Nondisabled		Parents	Children				Disabled	
		Widows	Widowers		Total	Under age 18	Disabled adult children	Students	Widows	Widowers
1940	19.61	20.28	...	13.09	12.22	12.22	...	...	...	...
1941	19.50	20.22	...	12.97	12.19	12.19	...	...	...	...
1942	19.57	20.15	...	13.05	12.24	12.24	...	...	...	...
1943	19.72	20.15	...	13.11	12.31	12.31	...	...	...	...
1944	19.80	20.17	...	13.08	12.38	12.38	...	...	...	...
1945	19.83	20.19	...	13.06	12.45	12.45	...	...	...	...
1950	34.24	36.54	37.23	36.69	28.43	28.43	...	...	...	...
1951	33.24	36.04	30.03	36.68	28.05	28.05	...	...	...	...
1952	36.13	40.67	33.09	41.33	31.30	31.30	...	...	...	...
1953	37.49	40.88	34.08	41.96	32.28	32.28	...	...	...	...
1954	44.52	46.28	39.27	47.44	37.01	37.01	...	...	...	...
1955	45.91	48.70	46.51	49.93	38.12	38.12	...	...	...	...
1956	47.35	50.14	47.11	50.78	39.36	39.36	...	...	...	...
1957	49.05	51.09	47.77	51.87	40.85	40.78	48.38	...	...	...
1958	50.53	51.91	48.84	52.83	42.10	41.98	49.63	...	...	...
1959	57.37	56.73	53.28	58.86	47.48	47.34	52.89	...	...	...
1960	59.29	57.69	53.81	60.31	51.37	51.29	54.10	...	...	...
1961	59.38	64.92	61.66	67.15	52.74	52.64	55.50	...	...	...
1962	59.38	65.88	62.12	68.18	53.57	53.47	55.99	...	...	...
1963	59.43	66.85	63.17	69.11	54.33	54.23	56.58	...	...	...
1964	59.40	67.85	63.49	70.05	54.99	54.87	57.27	...	...	...
1965	65.46	73.75	69.68	76.03	61.26	60.21	62.14	72.98	...	...
1966	65.59	74.11	70.52	76.52	61.84	60.37	62.67	71.71	...	...
1967	65.86	74.99	71.22	77.23	62.57	60.99	63.37	72.33	...	...
1968	74.93	86.54	82.14	88.21	70.85	68.90	73.11	81.76	72.27	72.40
1969	75.06	87.48	83.08	88.96	71.10	69.11	73.77	81.93	71.02	66.50
1970	86.51	102.02	96.50	103.21	82.23	79.82	85.79	94.77	81.99	73.10
1971	95.61	113.57	106.13	114.26	90.94	88.12	95.03	104.80	90.11	83.10
1972	115.45	138.19	127.98	138.95	110.36	106.87	115.25	126.63	109.50	98.80
1973	118.20	157.40	146.70	140.60	111.70	108.20	116.20	128.50	111.20	101.70
1974	134.20	177.30	164.30	157.50	126.48	122.52	130.33	144.79	125.90	118.60
1975	147.25	193.92	178.27	171.86	139.40	135.00	142.26	157.81	137.70	128.10
1976	159.77	208.99	191.78	185.07	151.94	147.49	152.88	169.80	147.00	133.80
1977	173.80	224.30	177.10	198.30	^a 165.70	^a 161.50	^a 163.60	^a 183.10	156.20	131.60
1978	190.40	241.40	186.10	214.00	182.20	178.30	176.20	200.80	165.70	129.70
1979	212.60	269.80	209.00	238.70	205.60	201.70	195.90	226.60	180.80	133.40
1980	246.20	311.50	239.40	276.00	239.50	235.30	226.40	265.40	205.40	145.70
1981	276.70	349.80	266.80	310.40	270.90	265.70	254.00	301.70	227.20	158.80
1982	302.80	379.30	285.60	335.40	285.40	291.50	279.90	260.70	242.80	165.50
1983	308.70	397.10	295.70	349.80	298.00	307.20	289.00	233.40	251.10	166.20
1984	321.50	416.10	306.80	363.90	314.30	320.70	302.60	257.20	307.70	190.70
1985	332.50	434.00	317.80	378.20	330.50	332.60	315.50	360.80	316.60	191.80
1986	338.30	444.90	324.80	386.30	336.80	338.70	323.10	375.70	321.30	195.50
1987	352.70	468.90	340.60	407.30	352.40	353.90	340.00	400.10	335.60	202.30
1988	367.90	493.40	359.50	428.40	367.60	368.00	357.40	424.70	350.00	211.30
1989	387.60	522.60	382.00	453.50	384.90	384.30	378.10	447.90	368.90	223.60
1990	409.10	557.40	408.40	482.20	405.50	403.80	402.50	471.00	391.30	238.40
1991	424.10	584.50	428.00	506.10	420.10	417.00	421.50	486.20	409.40	260.60
1992	437.70	608.70	443.60	526.40	432.30	427.60	438.30	504.10	425.30	273.30
1993	448.40	631.70	461.50	547.20	443.10	437.00	453.70	515.00	436.90	286.20
1994	464.40	656.60	481.40	569.50	456.20	448.70	470.80	532.20	449.20	299.90

(Continued)

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F6—Average monthly benefit for survivors, by type of benefit, December 1940–2009, selected years (in dollars)—Continued

Year	Widowed mothers and fathers	Nondisabled		Parents	Children				Disabled	
		Widows	Widowers		Total	Under age 18	Disabled adult children	Students	Widows	Widowers
1995	477.90	681.20	500.20	590.80	468.70	459.80	487.40	546.50	461.50	307.60
1996	514.90	708.30	520.70	613.50	487.20	478.20	506.10	560.80	474.30	318.00
1997	532.00	732.50	534.50	635.70	500.00	490.10	521.30	569.60	483.90	326.90
1998	545.10	750.30	549.10	651.10	509.60	498.90	532.80	579.90	491.00	332.90
1999	565.70	776.10	572.40	673.90	526.30	515.00	550.40	595.80	503.90	340.30
2000	595.00	811.80	606.90	703.90	550.10	538.30	574.70	628.70	523.80	361.70
2001	620.80	842.50	636.80	728.60	570.80	558.90	595.20	643.60	541.20	374.80
2002	640.20	862.80	662.80	752.70	584.60	572.90	608.40	649.40	553.00	384.70
2003	663.70	889.50	697.70	779.20	603.10	591.40	626.10	667.00	569.10	400.80
2004	689.40	921.90	736.00	809.70	625.30	613.80	647.90	688.10	588.50	416.60
2005	724.50	968.40	785.30	850.60	656.30	644.50	679.40	720.20	615.50	441.50
2006	756.60	1,009.80	829.10	892.20	683.70	671.10	708.00	747.50	637.40	455.00
2007	781.80	1,042.60	864.50	918.00	704.30	691.30	728.70	765.20	652.70	468.80
2008	834.90	1,114.70	937.90	978.90	745.40	737.40	755.20	812.50	691.80	498.00
2009	841.60	1,125.90	961.50	987.80	747.40	742.30	751.20	805.10	691.50	497.30

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: . . . = not applicable.

a. Estimated.

CONTACT: Karyn Foley (410) 965-9047 or supplement@ssa.gov.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F7—Number and percentage distribution of survivors, by primary insurance amount and type of benefit, December 2009

Primary insurance amount (dollars)	Widowed mothers and fathers		Nondisabled widow(er)s		Parents		Disabled widow(er)s		Children	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Total	159,870	100.0	4,090,496	100.0	1,646	100.0	236,480	100.0	1,921,148	100.0
Less than 300.00	1,920	1.2	31,116	0.8	5	0.3	1,698	0.7	51,776	2.7
300.00–349.90	872	0.5	12,755	0.3	5	0.3	950	0.4	22,987	1.2
350.00–399.90	1,076	0.7	13,838	0.3	4	0.2	1,056	0.4	24,402	1.3
400.00–449.90	1,175	0.7	51,025	1.2	11	0.7	1,615	0.7	47,531	2.5
450.00–499.90	1,174	0.7	24,913	0.6	3	0.2	1,485	0.6	30,991	1.6
500.00–549.90	1,330	0.8	32,770	0.8	9	0.5	1,674	0.7	32,804	1.7
550.00–599.90	1,820	1.1	51,305	1.3	18	1.1	2,421	1.0	45,454	2.4
600.00–649.90	2,305	1.4	59,858	1.5	41	2.5	3,162	1.3	54,214	2.8
650.00–699.90	3,895	2.4	62,161	1.5	51	3.1	4,749	2.0	76,600	4.0
700.00–749.90	4,695	2.9	69,307	1.7	63	3.8	5,672	2.4	85,534	4.5
750.00–799.90	5,009	3.1	70,222	1.7	66	4.0	5,870	2.5	83,708	4.4
800.00–849.90	5,137	3.2	75,906	1.9	81	4.9	6,450	2.7	82,557	4.3
850.00–899.90	5,197	3.3	82,017	2.0	74	4.5	6,865	2.9	81,843	4.3
900.00–949.90	5,622	3.5	90,973	2.2	78	4.7	7,387	3.1	81,906	4.3
950.00–999.90	5,753	3.6	92,052	2.3	68	4.1	7,609	3.2	76,420	4.0
1,000.00–1,049.90	6,039	3.8	115,439	2.8	75	4.6	8,082	3.4	80,216	4.2
1,050.00–1,099.90	6,197	3.9	138,857	3.4	71	4.3	8,330	3.5	79,026	4.1
1,100.00–1,149.90	6,163	3.9	137,435	3.4	64	3.9	8,814	3.7	72,384	3.8
1,150.00–1,199.90	6,126	3.8	151,259	3.7	88	5.3	8,931	3.8	68,689	3.6
1,200.00–1,249.90	5,957	3.7	164,136	4.0	55	3.3	8,982	3.8	64,882	3.4
1,250.00–1,299.90	5,654	3.5	171,704	4.2	58	3.5	9,057	3.8	61,257	3.2
1,300.00–1,349.90	5,526	3.5	177,538	4.3	68	4.1	9,073	3.8	57,335	3.0
1,350.00–1,399.90	5,175	3.2	191,694	4.7	43	2.6	8,878	3.8	54,024	2.8
1,400.00–1,449.90	5,109	3.2	222,491	5.4	59	3.6	8,847	3.7	52,461	2.7
1,450.00–1,499.90	4,734	3.0	236,860	5.8	46	2.8	8,654	3.7	49,021	2.6
1,500.00–1,549.90	4,307	2.7	239,565	5.9	42	2.6	8,400	3.6	44,500	2.3
1,550.00–1,599.90	4,397	2.8	248,862	6.1	42	2.6	8,663	3.7	43,679	2.3
1,600.00–1,649.90	4,082	2.6	240,293	5.9	33	2.0	8,362	3.5	40,438	2.1
1,650.00–1,699.90	3,811	2.4	159,958	3.9	34	2.1	7,669	3.2	31,850	1.7
1,700.00–1,749.90	3,510	2.2	124,654	3.0	43	2.6	6,877	2.9	27,731	1.4
1,750.00–1,799.90	3,329	2.1	94,404	2.3	28	1.7	6,499	2.7	24,726	1.3
1,800.00–1,849.90	3,311	2.1	77,396	1.9	31	1.9	6,476	2.7	23,474	1.2
1,850.00–1,899.90	4,355	2.7	73,191	1.8	35	2.1	7,743	3.3	27,891	1.5
1,900.00–1,949.90	4,027	2.5	62,032	1.5	31	1.9	6,530	2.8	24,845	1.3
1,950.00–1,999.90	3,404	2.1	52,640	1.3	25	1.5	5,668	2.4	20,783	1.1
2,000.00 or more	17,677	11.1	189,870	4.6	98	6.0	17,282	7.3	93,209	4.9

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

CONTACT: Karyn Foley (410) 965-9047 or supplement@ssa.gov.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F8—Number of widow(er)s and total monthly benefits, by type of benefit, December 1950–2009

Year	Total		Nondisabled—				Disabled widow(er)s	
			Widows		Widowers			
	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)
1950	314,189	11,481	314,126	11,479	63	2	...	...
1951	384,265	13,849	384,011	13,841	254	8	...	...
1952	454,563	18,482	454,064	18,466	499	17	...	...
1953	540,653	22,096	539,854	22,069	799	27	...	...
1954	638,091	29,526	637,012	29,483	1,079	42	...	...
1955	701,360	34,152	700,294	34,103	1,066	50	...	...
1956	913,069	45,780	911,841	45,722	1,228	58	...	...
1957	1,095,137	55,944	1,093,645	55,872	1,492	71	...	...
1958	1,232,583	63,977	1,230,953	63,897	1,630	80	...	...
1959	1,393,587	79,047	1,391,686	78,946	1,901	101	...	...
1960	1,543,843	89,054	1,541,790	88,943	2,053	110	...	...
1961	1,697,308	110,179	1,694,977	110,035	2,331	144	...	...
1962	1,859,191	122,475	1,856,658	122,318	2,533	157	...	...
1963	2,010,769	134,403	2,008,102	134,234	2,667	168	...	...
1964	2,158,912	146,476	2,156,143	146,300	2,769	176	...	...
1965	2,371,433	174,883	2,368,629	174,688	2,804	195	...	...
1966	2,602,015	192,821	2,599,178	192,620	2,837	200	...	...
1967	2,769,618	207,692	2,766,736	207,487	2,882	205	...	...
1968	2,937,890	253,924	2,913,376	252,123	2,951	242	21,563	1,558
1969	3,091,710	269,799	3,049,177	266,741	3,064	255	39,469	2,803
1970	3,227,160	328,245	3,174,846	323,912	3,033	293	49,281	4,041
1971	3,366,304	380,963	3,306,528	375,528	3,033	322	56,743	5,113
1972	3,509,777	483,161	3,442,595	475,746	3,015	386	64,167	7,029
1973	3,656,353	571,654	3,574,458	562,441	3,126	459	78,769	8,754
1974	3,769,559	663,569	3,674,376	651,471	3,055	502	92,128	11,596
1975	3,888,705	747,902	3,776,090	732,269	3,104	553	109,511	15,080
1976	3,994,380	827,325	3,871,894	809,181	3,059	587	119,427	17,557
1977	4,119,487	914,738	3,980,324	892,764	11,887	2,105	127,276	19,869
1978	4,211,710	1,005,929	4,066,673	981,615	15,287	2,845	129,751	21,469
1979	4,321,496	1,153,272	4,173,745	1,126,089	17,918	3,745	129,833	23,438
1980	4,410,515	1,358,836	4,262,607	1,327,814	20,328	4,866	127,580	26,156
1981	4,507,941	1,560,103	4,363,708	1,526,511	22,643	6,042	121,590	27,550
1982	4,594,961	1,724,392	4,453,575	1,689,073	25,014	7,144	116,372	28,175
1983	4,693,791	1,844,798	4,554,414	1,808,647	27,786	8,216	111,591	27,935
1984	4,779,190	1,973,203	4,640,805	1,930,807	29,234	8,970	109,151	33,426
1985	4,862,805	2,094,003	4,725,618	2,050,678	30,182	9,592	107,005	33,734
1986	4,928,019	2,175,345	4,789,969	2,131,049	31,076	10,092	106,974	34,204
1987	4,983,846	2,318,747	4,846,135	2,272,557	31,429	10,703	106,282	35,487
1988	5,028,822	2,461,945	4,892,829	2,414,239	32,870	11,816	103,123	35,892
1989	5,070,873	2,629,728	4,935,911	2,579,726	33,332	12,731	101,630	37,270
1990	5,111,482	2,827,012	4,976,420	2,773,818	34,073	13,916	100,989	39,278
1991	5,158,383	2,989,385	5,008,789	2,927,768	35,105	15,024	114,489	46,593
1992	5,205,375	3,138,250	5,037,583	3,066,568	36,468	16,178	131,324	55,504
1993	5,224,279	3,264,849	5,039,874	3,183,768	37,390	17,255	147,015	63,826
1994	5,232,379	3,394,982	5,034,219	3,305,229	37,484	18,043	160,676	71,710
1995	5,225,519	3,514,262	5,014,991	3,416,203	37,504	18,759	173,024	79,300
1996	5,209,812	3,639,632	4,990,079	3,534,268	37,822	19,692	181,911	85,671
1997	5,053,442	3,646,898	4,829,456	3,537,348	36,048	19,268	187,938	90,282
1998	4,989,855	3,685,349	4,759,829	3,571,047	35,845	19,683	194,181	94,619
1999	4,943,915	3,774,601	4,709,091	3,654,598	36,029	20,624	198,795	99,380

(Continued)

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F8—Number of widow(er)s and total monthly benefits, by type of benefit, December 1950–2009—Continued

Year	Total		Nondisabled—				Disabled widow(er)s	
	Number	Total monthly benefits (thousands of dollars)	Widows		Widowers		Number	Total monthly benefits (thousands of dollars)
			Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)		
2000	4,901,437	3,912,527	4,663,228	3,785,532	36,782	22,322	201,427	104,674
2001	4,828,327	3,997,687	4,586,677	3,864,251	37,407	23,822	204,243	109,615
2002	4,770,638	4,043,051	4,524,020	3,903,384	39,260	26,020	207,358	113,648
2003	4,707,215	4,110,963	4,456,446	3,964,035	41,410	28,892	209,359	118,035
2004	4,643,035	4,200,895	4,388,305	4,045,712	43,995	32,379	210,735	122,803
2005	4,568,991	4,339,977	4,310,330	4,174,318	45,660	35,856	213,001	129,804
2006	4,493,620	4,445,576	4,225,561	4,267,017	47,881	39,700	220,178	138,859
2007	4,436,338	4,526,864	4,160,409	4,337,586	50,947	44,045	224,982	145,233
2008	4,380,164	4,773,510	4,094,903	4,564,447	55,254	51,821	230,007	157,243
2009	4,326,976	4,757,157	4,030,494	4,538,025	60,002	57,695	236,480	161,437

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

CONTACT: Karyn Foley (410) 965-9047 or supplement@ssa.gov.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F9—Number, percentage, and average monthly benefit, by year of entitlement as nondisabled widow(er), December 2009

Year	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)
Total	4,090,496	100.0	...	1,123.50
2005–2009	1,225,881	30.0	...	1,191.50
2000–2004	907,949	22.2	...	1,175.60
1995–1999	684,963	16.7	...	1,128.70
1990–1994	555,170	13.6	...	1,081.30
1985–1989	402,530	9.8	...	1,013.70
1980–1984	222,698	5.4	...	940.10
1975–1979	70,895	1.7	...	856.30
1971–1974	16,518	0.4	...	792.60
Before 1971	3,892	0.1	...	785.60
2009	265,261	6.5	6.5	1,189.10
2008	269,820	6.6	13.1	1,193.40
2007	247,470	6.0	19.1	1,195.80
2006	228,296	5.6	24.7	1,191.20
2005	215,034	5.3	30.0	1,187.40
2004	203,900	5.0	35.0	1,185.40
2003	192,768	4.7	39.7	1,189.90
2002	180,276	4.4	44.1	1,177.30
2001	170,114	4.2	48.2	1,163.40
2000	160,891	3.9	52.2	1,157.10
1999	150,155	3.7	55.8	1,146.70
1998	142,279	3.5	59.3	1,135.10
1997	135,422	3.3	62.6	1,124.60
1996	130,980	3.2	65.8	1,119.60
1995	126,127	3.1	68.9	1,113.80
1994	121,556	3.0	71.9	1,104.30
1993	116,249	2.8	74.7	1,095.10
1992	112,022	2.7	77.5	1,081.90
1991	105,203	2.6	80.0	1,066.80
1990	100,140	2.4	82.5	1,052.10
1989	92,304	2.3	84.7	1,040.30
1988	87,344	2.1	86.9	1,024.30
1987	80,938	2.0	88.9	1,012.50
1986	74,871	1.8	90.7	996.70
1985	67,073	1.6	92.3	983.70
1984	59,182	1.4	93.8	964.70
1983	52,703	1.3	95.1	948.30
1982	43,672	1.1	96.1	939.00
1981	37,719	0.9	97.0	920.90
1980	29,422	0.7	97.8	901.90
1979	22,502	0.6	98.3	885.30
1978	17,081	0.4	98.7	869.80
1977	12,261	0.3	99.0	848.00
1976	10,823	0.3	99.3	823.90
1975	8,228	0.2	99.5	803.70
1974	6,408	0.2	99.7	798.60
1973	4,605	0.1	99.8	792.50
1972	3,334	0.1	99.9	785.20
1971	2,171	0.1	99.9	786.60

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Represents those entitled in specified year or later.

CONTACT: Karyn Foley (410) 965-9047 or supplement@ssa.gov.

Table 5.F10—Number, percentage, and average monthly benefit, by year of entitlement as disabled widow(er), December 2009

Year	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)
Total	236,480	100.0	...	682.70
2005–2009	111,818	47.3	...	672.20
2000–2004	90,152	38.1	...	701.20
1994–1999	34,510	14.6	...	668.20
2009	16,204	6.9	6.9	645.10
2008	23,785	10.1	16.9	671.70
2007	24,166	10.2	27.1	671.70
2006	24,144	10.2	37.3	678.50
2005	23,519	9.9	47.3	685.30
2004	23,001	9.7	57.0	698.60
2003	21,278	9.0	66.0	701.60
2002	18,340	7.8	73.8	713.10
2001	15,126	6.4	80.2	697.20
2000	12,407	5.2	85.4	692.70
1999	10,075	4.3	89.7	679.80
1998	7,905	3.3	93.0	666.50
1997	6,394	2.7	95.7	652.80
1996	4,769	2.0	97.7	663.60
1995	3,347	1.4	99.1	671.80
1994	2,020	0.9	100.0	671.20

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Represents those entitled in specified year or later.

CONTACT: Karyn Foley (410) 965-9047 or supplement@ssa.gov.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F11—Percentage distribution of nondisabled widow(er)s, by monthly benefit and age, December 2009

Monthly benefit (dollars)	Total, 60 or older	60–61	62–64	65–69	70–74	75–79	80–84	85–89	90 or older
Total									
Number	4,090,496	127,548	315,475	623,868	537,901	661,114	753,740	647,735	423,115
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 300.00	1.9	2.6	3.1	2.0	2.1	2.1	2.0	1.5	0.5
300.00–349.90	0.9	0.9	0.9	0.7	0.8	0.9	1.0	1.2	1.1
350.00–399.90	1.0	1.0	0.9	0.7	0.9	0.9	1.0	1.1	1.6
400.00–449.90	1.3	1.2	1.1	1.0	1.3	1.3	1.4	1.5	1.9
450.00–499.90	1.5	1.8	1.4	1.3	1.6	1.6	1.6	1.6	1.6
500.00–549.90	1.8	2.5	1.8	1.6	1.9	1.8	1.8	1.8	1.9
550.00–599.90	2.1	2.7	2.1	1.8	2.1	2.1	2.0	2.0	2.2
600.00–649.90	2.2	2.9	2.3	1.9	2.3	2.2	2.2	2.2	2.4
650.00–699.90	2.4	3.0	2.5	2.1	2.5	2.4	2.3	2.5	2.6
700.00–749.90	2.7	3.2	2.7	2.3	2.6	2.6	2.6	2.8	3.1
750.00–799.90	3.1	3.3	2.9	2.5	2.9	3.0	3.1	3.4	3.8
800.00–849.90	3.3	3.5	3.2	2.7	3.0	3.2	3.3	3.5	4.1
850.00–899.90	3.8	3.7	3.4	3.0	3.5	3.7	3.9	4.2	4.7
900.00–949.90	4.0	3.9	3.6	3.2	3.8	3.9	4.1	4.3	4.7
950.00–999.90	4.2	4.1	3.8	3.5	4.1	4.3	4.5	4.6	4.8
1,000.00–1,049.90	4.7	4.2	4.0	3.8	4.5	4.9	5.3	5.2	5.1
1,050.00–1,099.90	5.2	4.4	4.3	4.1	4.8	5.5	6.2	5.7	5.3
1,100.00–1,149.90	5.7	4.6	4.6	4.6	6.1	6.8	6.2	5.8	5.1
1,150.00–1,199.90	5.9	4.6	4.7	5.0	6.7	6.5	5.9	6.7	5.1
1,200.00–1,249.90	5.4	4.3	4.5	4.9	6.1	5.4	5.7	5.7	4.7
1,250.00–1,299.90	5.0	4.0	4.4	4.9	5.4	5.3	5.6	4.7	4.3
1,300.00–1,349.90	4.9	4.5	5.0	5.1	5.0	5.6	5.2	4.1	3.9
1,350.00–1,399.90	4.2	5.6	5.3	5.0	4.4	4.6	3.8	3.2	2.9
1,400.00–1,449.90	3.6	5.3	5.1	4.7	3.8	3.4	3.0	3.1	2.5
1,450.00–1,499.90	3.3	4.7	4.8	4.3	3.0	2.7	2.9	3.0	2.2
1,500.00–1,549.90	2.9	4.1	4.5	3.9	2.5	2.5	2.7	2.6	2.1
1,550.00–1,599.90	2.6	3.4	4.0	3.5	2.4	2.5	2.3	2.1	2.0
1,600.00–1,649.90	2.2	2.7	3.1	2.8	2.2	2.0	1.8	1.9	2.2
1,650.00–1,699.90	1.6	2.0	2.0	2.3	1.7	1.5	1.2	1.2	1.7
1,700.00–1,749.90	1.3	0.7	1.4	2.0	1.3	1.0	1.0	1.0	1.5
1,750.00–1,799.90	1.0	0.3	1.0	1.8	1.0	0.7	0.7	0.8	1.2
1,800.00–1,849.90	0.8	0.1	0.7	1.5	0.8	0.5	0.5	0.7	1.0
1,850.00–1,899.90	0.6	^a	0.4	1.2	0.6	0.4	0.4	0.6	0.8
1,900.00 or more	2.9	0.1	0.6	4.1	2.0	2.1	2.5	3.6	5.2
Average benefit (dollars)	1,123.50	1,074.70	1,121.20	1,197.60	1,114.40	1,103.90	1,102.40	1,110.90	1,129.90

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

a. Less than 0.05 percent.

CONTACT: Karyn Foley (410) 965-9047 or supplement@ssa.gov.

5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F12—Number of widowed and surviving divorced mothers and fathers and total monthly benefits, by type of benefit, December 1950–2009, selected years

Year	Total		Widowed						Surviving divorced	
			Subtotal		With at least 1 child under age 16 ^a		Entitled solely because of at least 1 disabled child ^b			
	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)
1950	169,438	5,801	169,426	5,800	169,426	5,800	...	...	12	^c
1955	291,916	13,403	291,656	13,389	291,656	13,389	...	...	260	14
1960	401,358	23,795	400,976	23,768	394,560	23,383	6,416	385	382	27
1965	471,816	30,882	471,286	30,842	461,011	30,132	10,275	710	530	40
1970	523,136	45,258	521,698	45,127	510,215	44,039	11,483	1,089	1,438	131
1971	535,126	51,163	533,560	51,055	520,301	49,603	13,259	1,402	1,566	158
1972	540,965	62,457	539,153	62,237	526,548	60,612	12,605	1,625	1,812	220
1973	571,907	67,578	565,327	66,823	551,509	64,985	13,818	1,838	6,580	754
1974	573,506	76,980	562,801	75,605	544,335	72,914	18,466	2,692	10,705	1,374
1975	581,845	85,676	565,941	83,435	544,886	80,068	21,075	3,366	15,904	2,241
1976	578,727	92,466	558,933	89,400	537,002	85,637	21,931	3,764	19,794	3,065
1977	583,195	101,345	558,886	97,227	536,481	93,091	22,405	4,136	24,309	4,117
1978	576,343	109,714	548,463	104,506	525,879	100,028	22,584	4,478	27,880	5,209
1979	573,750	121,957	541,480	115,284	518,564	110,235	22,916	5,049	32,270	6,674
1980	562,316	138,426	525,661	129,754	502,639	123,885	23,022	5,869	36,655	8,671
1981	547,593	151,509	507,777	140,990	484,427	134,299	23,350	6,691	39,816	10,518
1982	514,772	155,876	474,003	144,207	451,159	137,068	22,844	7,139	40,769	11,669
1983	400,298	123,559	363,946	112,979	339,367	104,956	24,579	8,022	36,352	10,581
1984	382,411	122,957	346,319	112,002	318,076	102,391	28,243	9,612	36,092	10,995
1985	371,659	123,557	335,085	112,117	306,004	101,812	29,081	10,304	36,574	11,440
1986	350,546	118,602	315,572	107,470	286,290	96,887	29,282	10,583	34,974	11,132
1987	340,940	115,967	307,581	104,888	278,582	93,871	28,999	11,017	33,359	11,079
1988	317,761	116,902	285,265	105,596	256,463	94,096	28,802	11,500	32,496	11,306
1989	312,079	120,970	280,006	109,184	251,646	97,170	28,360	12,014	32,073	11,786
1990	303,923	124,340	272,526	112,103	244,965	99,683	27,561	12,420	31,397	12,237
1991	300,661	127,510	269,679	114,962	242,379	102,085	27,300	12,877	30,982	12,548
1992	294,716	128,748	263,630	115,884	236,990	102,840	26,640	13,045	30,546	12,864
1993	289,350	129,752	259,320	116,771	232,794	103,365	26,526	13,407	30,030	12,981
1994	283,072	131,463	253,928	118,399	227,709	104,658	26,219	13,741	29,144	13,064
1995	275,020	131,430	247,113	118,550	221,494	104,664	25,619	13,886	27,907	12,881
1996	242,135	124,678	218,171	112,627	193,664	98,799	24,507	13,828	23,964	12,051
1997	230,222	122,488	207,658	110,774	184,184	97,120	23,474	13,654	22,564	11,714
1998	220,610	120,247	199,447	109,001	176,660	95,491	22,787	13,510	21,163	11,246
1999	212,401	120,157	192,544	109,195	170,572	95,732	21,972	13,463	19,857	10,962
2000	203,052	120,812	184,397	109,941	164,420	97,063	19,977	12,878	18,655	10,871
2001	197,375	122,526	179,413	111,539	160,186	98,672	19,227	12,867	17,962	10,987
2002	194,117	124,267	176,447	113,097	158,020	100,413	18,427	12,685	17,670	11,170
2003	190,252	126,278	172,955	114,914	154,990	102,158	17,965	12,756	17,297	11,364
2004	183,829	126,734	167,234	115,343	150,681	103,150	16,553	12,193	16,595	11,391
2005	178,396	129,246	162,455	117,756	146,228	105,212	16,227	12,544	15,941	11,490
2006	171,453	129,721	156,304	118,314	140,615	105,653	15,689	12,661	15,149	11,407
2007	164,665	128,742	150,214	117,471	135,146	104,935	15,068	12,536	14,451	11,271
2008	159,610	133,261	145,640	121,615	130,954	108,544	14,686	13,071	13,970	11,646
2009	159,870	134,547	145,784	122,724	130,564	109,017	15,220	13,707	14,086	11,823

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: ... = not applicable.

- a. Prior to August 1981, benefits were payable to mothers and fathers caring for a child under age 18. For mothers and fathers caring for a child who was at least age 14 and who were entitled in August 1981, benefits were continued until the child attained age 18 or September 1983, whichever came earlier.
- b. Excludes mothers and fathers who had both disabled and nondisabled entitled children in their care.
- c. Less than \$500.

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5.F OASDI Current-Pay Benefits: Dependents and Survivors

Table 5.F13—Number and average monthly benefit for nondisabled widows aged 65 or older, by age, reduction status, and limitation of benefit, December 2009

Age	Number	Average monthly benefit (dollars)	Benefits not reduced due to early retirement of widow						Benefits reduced due to early retirement of widow	
			Number	Average monthly benefit (dollars)	Benefits not limited due to early retirement of deceased spouse		Benefits limited due to early retirement of deceased spouse			
					Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All nondisabled widows aged 65 or older	3,616,649	1,126.80	1,678,580	1,222.30	787,291	1,379.80	891,289	1,083.10	^a 1,938,069	1,044.10
65–69	606,938	1,199.70	76,250	1,408.60	52,587	1,494.30	23,663	1,218.10	530,688	1,169.70
65	118,515	1,133.70	546	1,228.70	474	1,241.00	72	1,147.70	117,969	1,133.30
66	132,284	1,241.40	14,278	1,512.80	11,060	1,572.10	3,218	1,309.20	118,006	1,208.60
67	128,322	1,236.20	18,050	1,455.10	12,872	1,534.30	5,178	1,258.30	110,272	1,200.30
68	115,983	1,201.50	20,054	1,386.40	13,377	1,478.30	6,677	1,202.50	95,929	1,162.90
69	111,834	1,176.60	23,322	1,331.90	14,804	1,423.90	8,518	1,172.00	88,512	1,135.70
70–74	533,597	1,116.20	165,873	1,227.70	88,223	1,321.70	77,650	1,120.90	367,724	1,065.90
70	101,200	1,145.50	26,030	1,275.00	15,390	1,361.80	10,640	1,149.40	75,170	1,100.60
71	102,791	1,124.60	28,604	1,245.90	15,868	1,327.70	12,736	1,144.10	74,187	1,077.80
72	103,301	1,109.70	31,692	1,221.30	16,500	1,313.40	15,192	1,121.20	71,609	1,060.30
73	109,778	1,103.60	36,716	1,207.50	18,883	1,302.90	17,833	1,106.50	73,062	1,051.40
74	116,527	1,101.20	42,831	1,208.90	21,582	1,311.60	21,249	1,104.60	73,696	1,038.60
75–79	657,691	1,105.60	302,241	1,209.40	142,207	1,331.10	160,034	1,101.20	355,450	1,017.30
75	122,238	1,106.20	48,960	1,214.70	24,461	1,324.90	24,499	1,104.70	73,278	1,033.70
76	120,929	1,102.80	52,328	1,210.10	25,501	1,323.90	26,827	1,102.00	68,601	1,020.90
77	130,686	1,101.30	60,192	1,204.60	28,014	1,324.50	32,178	1,100.30	70,494	1,013.00
78	136,381	1,107.00	66,237	1,208.90	30,456	1,336.90	35,781	1,099.90	70,144	1,010.70
79	147,457	1,109.90	74,524	1,209.60	33,775	1,341.50	40,749	1,100.30	72,933	1,008.00
80–84	750,838	1,103.90	422,324	1,200.50	186,585	1,350.50	235,739	1,081.80	328,514	979.60
80	147,554	1,109.60	77,630	1,206.20	34,899	1,342.40	42,731	1,095.00	69,924	1,002.30
81	150,674	1,105.10	82,393	1,201.00	36,599	1,344.10	45,794	1,086.60	68,281	989.40
82	154,313	1,104.50	86,658	1,202.70	38,160	1,352.10	48,498	1,085.10	67,655	978.70
83	151,213	1,099.00	87,771	1,196.80	38,942	1,350.70	48,829	1,074.00	63,442	963.60
84	147,084	1,101.30	87,872	1,196.70	37,985	1,362.50	49,887	1,070.50	59,212	959.80
85–89	645,775	1,112.20	410,621	1,211.10	179,443	1,399.90	231,178	1,064.50	235,154	939.50
85	146,305	1,098.00	89,339	1,193.00	38,948	1,364.70	50,391	1,060.30	56,966	949.00
86	137,619	1,102.90	85,896	1,199.70	37,251	1,382.50	48,645	1,059.70	51,723	942.20
87	129,566	1,110.10	82,798	1,206.30	36,209	1,392.60	46,589	1,061.40	46,768	939.80
88	124,222	1,122.30	80,958	1,223.90	35,418	1,423.20	45,540	1,068.80	43,264	932.30
89	108,063	1,134.10	71,630	1,238.40	31,617	1,446.00	40,013	1,074.30	36,433	929.00
90 or older	421,810	1,131.40	301,271	1,230.70	138,246	1,436.60	163,025	1,056.10	120,539	883.10

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

a. Includes 139,224 widows with benefits also limited due to early retirement of deceased spouse.

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5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G1—Percentage distribution of persons receiving both a retired-worker and a secondary benefit with and without reduction for early retirement, by sex and primary insurance amount, December 2009

Sex and primary insurance amount (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All dually entitled retired workers	6,589,036	100.0	1,080,424	100.0	5,508,612	100.0
Less than 250.00	354,501	5.4	50,774	4.7	303,727	5.5
250.00–299.90	269,993	4.1	33,726	3.1	236,267	4.3
300.00–349.90	295,410	4.5	37,344	3.5	258,066	4.7
350.00–399.90	288,135	4.4	37,095	3.4	251,040	4.6
400.00–449.90	339,773	5.2	48,618	4.5	291,155	5.3
450.00–499.90	281,692	4.3	39,877	3.7	241,815	4.4
500.00–549.90	313,004	4.8	46,287	4.3	266,717	4.8
550.00–599.90	469,096	7.1	77,621	7.2	391,475	7.1
600.00–649.90	492,212	7.5	83,592	7.7	408,620	7.4
650.00–699.90	544,631	8.3	86,743	8.0	457,888	8.3
700.00–749.90	502,088	7.6	81,501	7.5	420,587	7.6
750.00–799.90	453,731	6.9	73,966	6.8	379,765	6.9
800.00–849.90	366,057	5.6	63,326	5.9	302,731	5.5
850.00–899.90	302,509	4.6	54,643	5.1	247,866	4.5
900.00–949.90	249,751	3.8	46,842	4.3	202,909	3.7
950.00–999.90	200,680	3.0	39,288	3.6	161,392	2.9
1,000.00–1,049.90	164,737	2.5	34,029	3.1	130,708	2.4
1,050.00–1,099.90	134,086	2.0	28,774	2.7	105,312	1.9
1,100.00–1,149.90	108,359	1.6	23,329	2.2	85,030	1.5
1,150.00–1,199.90	89,964	1.4	18,969	1.8	70,995	1.3
1,200.00–1,249.90	74,526	1.1	15,232	1.4	59,294	1.1
1,250.00–1,299.90	61,929	0.9	12,165	1.1	49,764	0.9
1,300.00–1,349.90	50,780	0.8	9,625	0.9	41,155	0.7
1,350.00–1,399.90	40,343	0.6	7,501	0.7	32,842	0.6
1,400.00–1,449.90	33,046	0.5	6,228	0.6	26,818	0.5
1,450.00–1,499.90	25,852	0.4	5,080	0.5	20,772	0.4
1,500.00 or more	82,151	1.2	18,249	1.7	63,902	1.2
Men	146,920	100.0	35,740	100.0	111,180	100.0
Less than 250.00	5,850	4.0	2,518	7.0	3,332	3.0
250.00–299.90	3,548	2.4	1,308	3.7	2,240	2.0
300.00–349.90	3,801	2.6	1,302	3.6	2,499	2.2
350.00–399.90	3,739	2.5	1,228	3.4	2,511	2.3
400.00–449.90	4,124	2.8	1,423	4.0	2,701	2.4
450.00–499.90	3,376	2.3	1,104	3.1	2,272	2.0
500.00–549.90	3,714	2.5	1,181	3.3	2,533	2.3
550.00–599.90	5,471	3.7	1,857	5.2	3,614	3.3
600.00–649.90	6,228	4.2	2,021	5.7	4,207	3.8
650.00–699.90	7,337	5.0	2,250	6.3	5,087	4.6
700.00–749.90	7,247	4.9	2,118	5.9	5,129	4.6
750.00–799.90	7,246	4.9	1,991	5.6	5,255	4.7
800.00–849.90	6,805	4.6	1,808	5.1	4,997	4.5
850.00–899.90	6,364	4.3	1,563	4.4	4,801	4.3
900.00–949.90	5,796	3.9	1,378	3.9	4,418	4.0
950.00–999.90	5,238	3.6	1,127	3.2	4,111	3.7
1,000.00–1,049.90	4,824	3.3	1,010	2.8	3,814	3.4
1,050.00–1,099.90	4,631	3.2	896	2.5	3,735	3.4
1,100.00–1,149.90	4,550	3.1	775	2.2	3,775	3.4
1,150.00–1,199.90	4,623	3.1	769	2.2	3,854	3.5
1,200.00–1,249.90	4,455	3.0	722	2.0	3,733	3.4
1,250.00–1,299.90	4,329	2.9	657	1.8	3,672	3.3
1,300.00–1,349.90	4,289	2.9	625	1.7	3,664	3.3
1,350.00–1,399.90	4,244	2.9	554	1.6	3,690	3.3
1,400.00–1,449.90	4,249	2.9	535	1.5	3,714	3.3
1,450.00–1,499.90	3,751	2.6	515	1.4	3,236	2.9
1,500.00 or more	17,091	11.6	2,505	7.0	14,586	13.1

(Continued)

5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G1—Percentage distribution of persons receiving both a retired-worker and a secondary benefit with and without reduction for early retirement, by sex and primary insurance amount, December 2009—Continued

Sex and primary insurance amount (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	6,442,116	100.0	1,044,684	100.0	5,397,432	100.0
Less than 250.00	348,651	5.4	48,256	4.6	300,395	5.6
250.00–299.90	266,445	4.1	32,418	3.1	234,027	4.3
300.00–349.90	291,609	4.5	36,042	3.5	255,567	4.7
350.00–399.90	284,396	4.4	35,867	3.4	248,529	4.6
400.00–449.90	335,649	5.2	47,195	4.5	288,454	5.3
450.00–499.90	278,316	4.3	38,773	3.7	239,543	4.4
500.00–549.90	309,290	4.8	45,106	4.3	264,184	4.9
550.00–599.90	463,625	7.2	75,764	7.3	387,861	7.2
600.00–649.90	485,984	7.5	81,571	7.8	404,413	7.5
650.00–699.90	537,294	8.3	84,493	8.1	452,801	8.4
700.00–749.90	494,841	7.7	79,383	7.6	415,458	7.7
750.00–799.90	446,485	6.9	71,975	6.9	374,510	6.9
800.00–849.90	359,252	5.6	61,518	5.9	297,734	5.5
850.00–899.90	296,145	4.6	53,080	5.1	243,065	4.5
900.00–949.90	243,955	3.8	45,464	4.4	198,491	3.7
950.00–999.90	195,442	3.0	38,161	3.7	157,281	2.9
1,000.00–1,049.90	159,913	2.5	33,019	3.2	126,894	2.4
1,050.00–1,099.90	129,455	2.0	27,878	2.7	101,577	1.9
1,100.00–1,149.90	103,809	1.6	22,554	2.2	81,255	1.5
1,150.00–1,199.90	85,341	1.3	18,200	1.7	67,141	1.2
1,200.00–1,249.90	70,071	1.1	14,510	1.4	55,561	1.0
1,250.00–1,299.90	57,600	0.9	11,508	1.1	46,092	0.9
1,300.00–1,349.90	46,491	0.7	9,000	0.9	37,491	0.7
1,350.00–1,399.90	36,099	0.6	6,947	0.7	29,152	0.5
1,400.00–1,449.90	28,797	0.4	5,693	0.5	23,104	0.4
1,450.00–1,499.90	22,101	0.3	4,565	0.4	17,536	0.3
1,500.00 or more	65,060	1.0	15,744	1.5	49,316	0.9

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

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5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G2—Number receiving both a retired-worker and a secondary benefit, by sex and type of secondary benefit, December 1952–2009

Year	Total	Women						Men				
		Subtotal		Wife's benefit		Widow's benefit		Parent's benefit	Subtotal	Husband's benefit	Widower's benefit	Parent's benefit
		Number	Percentage of all women retired workers	Number	Percentage of all women entitled to wife's benefit because of age	Number	Percentage of all women entitled to widow's benefit					
1952	36,132	35,402	6.0	14,131	6.0	20,850	4.4	421	730	258	83	389
1953	54,798	53,631	6.8	23,355	2.7	29,668	5.2	608	1,167	529	148	490
1954	79,689	77,978	8.0	34,225	3.4	42,899	6.3	854	1,711	827	257	627
1955	108,551	106,320	8.7	49,637	4.2	55,664	7.4	1,019	2,231	1,224	342	665
1956	143,284	140,603	9.1	68,766	4.8	70,601	7.2	1,236	2,681	1,542	426	713
1957	194,501	190,951	9.6	102,522	5.6	86,951	7.4	1,478	3,550	2,152	578	820
1958	229,599	225,790	9.8	124,504	6.1	99,669	7.5	1,617	3,809	2,421	634	754
1959	268,900	264,434	10.2	141,831	6.4	120,458	8.0	2,145	4,466	2,794	772	900
1960	307,736	302,646	10.6	159,032	6.8	141,218	8.4	2,396	5,090	3,197	911	982
1961	335,243	330,727	10.5	159,587	6.6	169,264	9.1	1,876	4,516	2,652	1,090	774
1962	427,085	421,535	12.1	204,445	7.9	214,371	10.4	2,719	5,550	3,229	1,330	991
1963	502,839	496,639	13.2	138,081	8.9	255,408	11.3	3,150	6,200	3,597	1,543	1,060
1964	577,954	571,144	14.2	269,657	9.9	297,929	12.1	3,558	6,810	3,940	1,752	1,118
1965	618,730	611,610	14.3	^a 282,940	^a 10.3	^a 324,930	^a 12.3	^a 3,740	^a 7,120	^a 4,110	^a 1,910	^a 1,100
1966	706,860	699,080	15.1	^a 315,550	^a 11.2	^a 379,440	^a 13.2	^a 4,090	^a 7,780	^a 4,470	^a 2,260	^a 1,050
1967	770,190	760,950	15.7	^a 334,200	^a 11.8	^a 422,480	^a 13.8	^a 4,270	^a 9,240	^a 5,190	^a 3,070	^a 980
1968	842,560	831,760	16.3	^a 354,750	^a 12.4	^a 472,590	^a 14.5	^a 4,420	^a 10,800	^a 5,810	^a 4,110	^a 880
1969	920,250	909,720	17.0	^a 376,520	^a 13.0	^a 528,660	^a 15.3	^a 4,540	^a 10,530	^a 5,620	^a 4,160	^a 750
1970	977,340	966,780	17.1	^a 388,210	^a 13.3	^a 573,950	^a 15.9	^a 4,620	^a 10,560	^a 5,530	^a 4,400	^a 630
1971	1,069,940	1,060,120	17.7	^a 411,710	^a 13.8	^a 643,730	^a 16.9	^a 4,680	^a 9,820	^a 5,130	^a 4,170	^a 520
1972	1,183,369	1,170,286	18.5	^a 477,333	^a 15.5	^a 688,087	^a 17.3	^a 4,866	^a 13,083	^a 6,797	^a 5,442	^a 844
1973	1,377,080	1,361,360	20.2	562,111	17.7	794,001	22.2	5,248	15,710	7,966	6,986	758
1974	1,534,583	1,516,326	21.3	^a 554,844	^a 17.1	^a 956,662	^a 21.4	^a 4,820	^a 18,257	^a 6,592	^a 11,080	^a 585
1975	1,679,825	1,660,451	22.4	616,669	18.4	1,038,992	22.3	4,790	19,374	9,920	8,690	764
1976	1,827,928	1,812,008	23.4	^a 669,792	^a 19.5	^a 1,137,251	^a 23.4	^a 4,965	^a 15,920	^a 7,497	^a 7,779	^a 644
1977	2,026,534	1,991,915	24.6	762,250	21.4	1,225,344	24.3	4,321	34,619	14,557	19,544	518
1978	2,208,490	2,163,011	25.7	836,004	22.8	1,322,897	25.3	4,110	45,479	17,832	27,192	455
1979	2,435,848	2,380,260	27.1	917,747	24.4	1,458,611	26.6	3,902	55,588	20,179	35,004	405
1980	2,660,037	2,594,467	28.5	1,015,672	26.2	1,575,085	27.8	3,710	65,570	22,597	42,580	393
1981	--	--	--	--	--	--	--	--	--	--	--	--
1982	3,109,239	3,031,518	31.1	1,239,736	29.8	1,788,556	29.5	3,226	77,721	24,787	52,604	330
1983	3,355,148	3,267,890	32.5	1,369,396	31.6	1,895,579	30.3	2,915	87,258	27,449	59,518	291
1984	3,568,639	3,479,191	33.7	1,479,756	33.2	1,996,805	31.0	2,630	89,448	27,189	62,011	248
1985	3,801,183	3,708,856	34.9	1,594,226	34.7	2,112,245	31.8	2,385	92,327	26,912	65,202	213
1986	4,032,760	3,934,811	36.1	1,719,449	36.2	2,213,225	32.5	2,137	97,949	27,693	70,064	192
1987	4,214,214	4,116,759	36.9	1,804,946	37.3	2,309,899	33.1	1,914	97,455	26,928	70,359	168
1988	4,403,012	4,302,714	37.9	1,892,763	38.5	2,408,232	33.8	1,719	100,298	27,210	72,942	146
1989	4,590,475	4,487,314	38.7	1,982,095	39.5	2,503,679	34.4	1,540	103,161	27,484	75,543	134
1990	4,783,122	4,677,680	39.5	2,076,737	40.5	2,599,560	35.1	1,383	105,442	27,463	77,862	117
1991	4,959,610	4,852,656	40.2	2,158,022	41.5	2,693,388	35.7	1,246	106,954	27,195	79,654	105
1992	5,140,627	5,032,206	41.0	2,242,029	42.3	2,789,029	36.3	1,148	108,421	26,849	81,475	97
1993	5,285,960	5,176,650	41.6	2,312,000	43.1	2,863,510	37.0	1,140	109,310	26,330	82,920	60
1994	5,419,910	5,308,300	42.1	2,359,470	43.9	2,947,820	37.6	1,010	111,610	26,920	84,660	30
1995	5,533,200	5,420,320	42.5	2,397,710	44.5	3,021,720	38.0	890	112,880	26,660	86,190	30
1996	5,629,780	5,517,510	42.8	2,429,520	45.3	3,087,130	38.3	860	112,270	25,750	86,480	40
1997	5,729,620	5,617,590	42.7	2,461,060	46.0	3,155,760	39.6	770	112,030	24,540	87,460	30
1998	5,810,410	5,699,080	42.8	2,482,950	46.7	3,215,380	40.4	750	111,330	23,740	87,560	30
1999	5,883,950	5,772,260	42.9	2,499,200	47.3	3,272,420	41.0	640	111,690	23,560	88,100	30

(Continued)

5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G2—Number receiving both a retired-worker and a secondary benefit, by sex and type of secondary benefit, December 1952–2009—Continued

Year	Total	Women							Men			
		Subtotal		Wife's benefit		Widow's benefit		Parent's benefit	Subtotal	Husband's benefit	Widower's benefit	Parent's benefit
		Number	Percentage of all women retired workers	Number	Percentage of all women entitled to wife's benefit because of age	Number	Percentage of all women entitled to widow's benefit					
2000	6,009,800	5,896,390	42.9	2,568,470	48.2	3,327,360	41.6	560	113,410	24,660	88,720	30
2001	6,076,350	5,961,580	42.9	2,583,730	48.9	3,377,330	42.4	520	114,770	25,570	89,170	30
2002	6,134,800	6,016,680	42.7	2,591,820	49.5	3,424,390	43.0	470	118,120	27,090	91,000	30
2003	6,183,070	6,063,250	42.4	2,602,590	50.1	3,460,280	43.7	380	119,820	28,160	91,640	20
2004	6,229,670	6,107,410	42.0	2,618,980	50.7	3,488,020	44.3	410	122,260	29,070	93,170	20
2005	6,289,650	6,164,730	41.6	2,650,260	51.4	3,514,100	44.9	370	124,920	30,070	94,810	40
2006	6,347,442	6,216,955	41.2	2,676,186	52.1	3,540,363	45.6	406	130,487	31,650	98,794	43
2007	6,406,313	6,271,488	40.7	2,706,165	52.8	3,564,946	46.1	377	134,825	33,613	101,168	44
2008	6,474,588	6,334,322	40.0	2,745,455	53.8	3,588,472	46.7	395	140,266	36,136	104,085	45
2009	6,589,036	6,442,116	39.2	2,822,655	54.8	3,619,057	47.3	404	146,920	39,640	107,239	41

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1993–2005 are based on a 10 percent sample. All other years are 100 percent data.

NOTE: -- = not available.

a. Distributions by type of secondary benefit are estimated.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G3—Number receiving both a retired-worker and a secondary benefit and average monthly benefit, by type of secondary benefit, December 2009

Type of secondary benefit	Number	Average monthly benefit (dollars)		
		Combined benefit	Retired-worker benefit	Reduced secondary benefit
All dually entitled retired workers	6,589,036	1,041.30	579.70	461.70
Wives and husbands	2,862,295	713.90	483.10	230.70
Wives of—	2,822,655	714.70	483.10	231.60
Retired workers	2,781,959	715.40	483.60	231.80
Disabled workers	40,696	666.50	449.20	217.30
Husbands of—	39,640	657.00	488.40	168.60
Retired workers	37,904	660.00	490.50	169.50
Disabled workers	1,736	590.60	442.30	148.30
Widow(er)s	3,726,296	1,292.80	653.80	639.00
Widows	3,619,057	1,295.00	646.10	648.90
Widowers	107,239	1,219.10	915.00	304.10
Parents	445	1,230.40	556.60	673.80

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

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Table 5.G4—Number receiving both a retired-worker and a secondary benefit, average monthly benefit, and retired-worker benefit as a percentage of combined benefit, December 2009

Total combined monthly benefit (dollars)	Number		Average combined monthly benefit (dollars)		Retired-worker benefit as a percentage of combined monthly benefit	
	Wives or husbands	Widow(er)s	Wives or husbands	Widow(er)s	Wives or husbands	Widow(er)s
All dually entitled retired workers	^a 2,862,295	^b 3,726,296	710.70	1,302.70	68	52
Less than 200.00	7,403	1,801	151.90	154.30	77	75
200.00–249.90	9,226	1,953	228.30	227.00	77	72
250.00–299.90	17,602	3,258	276.80	276.00	74	71
300.00–349.90	26,256	5,701	325.90	327.30	71	70
350.00–399.90	36,340	6,785	376.30	375.40	70	68
400.00–449.90	52,321	10,357	426.30	423.40	68	67
450.00–499.90	78,088	13,994	476.70	476.50	67	65
500.00–549.90	129,712	19,878	527.20	525.90	68	65
550.00–599.90	224,007	27,428	576.90	576.20	68	65
600.00–649.90	371,768	35,204	626.70	626.00	69	65
650.00–699.90	425,392	41,816	674.80	675.40	70	65
700.00–749.90	391,169	50,764	724.40	725.50	69	65
750.00–799.90	347,902	60,788	774.50	775.80	69	64
800.00–849.90	271,337	69,836	823.10	825.60	68	63
850.00–899.90	168,028	83,812	872.80	875.50	67	62
900.00–949.90	111,406	100,260	923.60	925.80	65	61
950.00–999.90	76,448	119,390	973.40	975.90	64	60
1,000.00–1,049.90	52,067	144,968	1,023.20	1,025.50	64	59
1,050.00–1,099.90	36,300	174,480	1,072.90	1,075.60	63	58
1,100.00–1,149.90	19,328	202,822	1,122.40	1,126.00	63	56
1,150.00–1,199.90	6,854	237,999	1,165.20	1,175.70	61	54
1,200.00–1,249.90	808	243,039	1,224.10	1,225.10	47	53
1,250.00–1,299.90	474	254,075	1,274.80	1,275.30	44	52
1,300.00–1,349.90	348	262,077	1,323.60	1,324.60	41	51
1,350.00–1,399.90	272	220,831	1,375.20	1,374.20	37	50
1,400.00–1,449.90	244	192,297	1,423.20	1,424.40	39	49
1,450.00–1,499.90	169	175,983	1,473.80	1,474.40	35	48
1,500.00 or more	1,026	964,700	1,747.90	1,747.80	34	43

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

a. Includes 39,640 husbands.

b. Includes 107,239 widowers.

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5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G5—Percentage distribution, by total combined monthly benefit and retired-worker benefit, December 2009

Total combined monthly benefit (dollars)	Number	Percentage distribution by dollar amount of retired-worker benefit												
		Total	Less than 200.00	200.00–249.90	250.00–299.90	300.00–349.90	350.00–399.90	400.00–449.90	450.00–499.90	500.00–549.90	550.00–599.90	600.00–649.90	650.00–699.90	700.00 or more
Dually entitled wives and husbands														
All	^a 2,862,295	100.0	6.6	6.3	6.9	7.0	6.9	6.9	9.1	12.1	11.1	9.1	6.7	11.3
Less than 200.00	7,403	100.0	100.0	...	...	...	...	...	...	...	...	...	...	...
200.00–249.90	9,226	100.0	61.1	38.9	...	...	...	...	...	...	...	...	...	...
250.00–299.90	17,602	100.0	42.4	31.5	26.1	...	...	...	...	...	...	...	...	...
300.00–349.90	26,256	100.0	30.8	24.4	25.5	19.2	...	...	...	...	...	...	...	...
350.00–399.90	36,340	100.0	22.9	19.5	21.7	21.0	14.8	...	...	...	...	...	...	...
400.00–449.90	52,321	100.0	18.5	15.8	18.3	18.6	17.1	11.5	...	...	...	...	...	...
450.00–499.90	78,088	100.0	14.6	13.4	14.9	15.4	14.8	14.6	12.3	...	...	...	...	...
500.00–549.90	129,712	100.0	11.3	11.1	11.9	11.9	11.7	12.1	17.0	13.0	...	...	...	...
550.00–599.90	224,007	100.0	9.2	9.6	9.6	9.3	9.3	10.0	14.8	18.2	10.0	...	...	...
600.00–649.90	371,768	100.0	6.9	7.1	7.9	8.0	8.1	8.5	13.6	16.7	15.3	7.9	...	...
650.00–699.90	425,392	100.0	4.7	5.1	6.1	6.6	6.9	7.3	11.4	16.1	15.5	14.0	6.4	...
700.00 or more	1,484,180	100.0	3.3	3.6	4.4	4.9	5.1	5.3	6.5	10.7	11.7	11.6	11.1	21.8
Dually entitled widow(er)s														
All	^b 3,726,296	100.0	3.8	3.8	4.4	4.8	4.1	4.9	6.9	7.1	7.1	6.9	6.2	39.8
Less than 200.00	1,801	100.0	100.0	...	...	...	...	...	...	...	...	...	...	...
200.00–249.90	1,953	100.0	68.4	31.6	...	...	...	...	...	...	...	...	...	...
250.00–299.90	3,258	100.0	47.7	30.2	22.1	...	...	...	...	...	...	...	...	...
300.00–349.90	5,701	100.0	33.0	23.0	25.3	18.7	...	...	...	...	...	...	...	...
350.00–399.90	6,785	100.0	25.2	18.3	20.5	24.2	11.8	...	...	...	...	...	...	...
400.00–449.90	10,357	100.0	20.1	14.3	17.5	22.4	15.5	10.2	...	...	...	...	...	...
450.00–499.90	13,994	100.0	17.6	12.6	14.4	16.3	13.3	15.3	10.4	...	...	...	...	...
500.00–549.90	19,878	100.0	14.7	10.8	11.9	13.6	11.4	13.2	15.7	8.6	...	...	...	...
550.00–599.90	27,428	100.0	11.5	8.9	9.8	11.7	10.0	12.3	14.2	14.0	7.7	...	...	...
600.00–649.90	35,204	100.0	9.5	7.5	8.5	10.0	8.5	10.4	13.2	13.1	12.5	6.8	...	...
650.00–699.90	41,816	100.0	7.9	6.2	7.4	8.5	7.2	9.2	12.1	12.4	12.1	11.3	5.7	...
700.00–749.90	50,764	100.0	6.5	5.5	6.3	7.5	6.5	8.3	10.8	11.4	11.6	10.9	10.0	4.7
750.00–799.90	60,788	100.0	5.7	5.0	5.9	6.7	5.9	7.2	10.0	10.4	10.6	10.6	9.7	12.3
800.00–849.90	69,836	100.0	5.0	4.3	5.3	6.3	5.4	6.5	9.2	9.9	10.1	10.1	9.1	18.9
850.00–899.90	83,812	100.0	4.4	4.0	4.9	5.8	4.9	6.0	8.3	9.2	9.6	9.7	8.8	24.2
900.00–949.90	100,260	100.0	3.9	3.8	4.4	5.4	4.6	5.8	7.7	8.4	8.9	9.1	8.5	29.4
950.00–999.90	119,390	100.0	3.6	3.5	4.2	5.2	4.4	5.5	7.6	7.9	8.4	8.5	7.9	33.2
1,000.00–1,049.90	144,968	100.0	3.3	3.4	4.0	5.0	4.3	5.3	7.2	7.6	7.8	8.1	7.6	36.4
1,050.00–1,099.90	174,480	100.0	3.2	3.3	4.0	4.6	4.1	4.9	7.1	7.2	7.4	7.5	7.3	39.4
1,100.00–1,149.90	202,822	100.0	3.3	3.6	4.1	4.7	4.0	4.9	6.9	7.1	7.1	7.2	6.7	40.3
1,150.00–1,199.90	237,999	100.0	3.7	3.9	4.3	4.6	4.0	5.0	7.0	7.0	6.9	7.0	6.4	40.2
1,200.00–1,249.90	243,039	100.0	3.5	4.0	4.1	4.5	3.8	4.7	6.9	6.9	6.9	6.8	6.2	41.7
1,250.00–1,299.90	254,075	100.0	3.4	3.8	4.1	4.4	3.7	4.6	6.8	6.9	6.8	6.7	6.0	42.8
1,300.00–1,349.90	262,077	100.0	3.3	3.7	4.0	4.2	3.6	4.4	6.9	7.0	6.8	6.7	6.0	43.3
1,350.00–1,399.90	220,831	100.0	3.0	3.4	3.8	4.1	3.6	4.2	6.7	6.9	6.8	6.6	6.0	44.9
1,400.00–1,449.90	192,297	100.0	2.8	3.3	3.8	4.0	3.5	4.2	6.3	6.8	6.8	6.5	5.9	46.2
1,450.00–1,499.90	175,983	100.0	2.9	3.4	3.8	4.0	3.5	4.1	6.1	6.5	6.6	6.4	5.9	46.8
1,500.00 or more	964,700	100.0	2.6	3.0	3.7	4.0	3.6	4.0	5.5	6.2	6.3	6.1	5.5	49.6

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Includes 39,640 husbands.

b. Includes 107,239 widowers.

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5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H1—Number and average monthly family benefit for selected family groups, December 1945–2009, selected years

Year	Retired-worker families				Survivor families				Disabled-worker families					
	Worker only			Worker and wife ^a	Non-disabled widow only	Widowed mother or father and—			Worker only			Worker, wife, ^b and—		Worker and spouse
	All	Men	Women			1 child	2 children	3 or more children	All	Men	Women	1 child	2 or more children	
Number (thousands)														
1945	416	338	78	181	95	86	48	24	...	...	...	...	...	...
1950	1,240	939	301	498	314	82	53	33	...	...	...	...	...	...
1955	3,266	2,054	1,212	1,124	700	126	86	80	...	...	...	...	...	...
1960	5,742	2,922	2,820	2,122	1,527	172	113	114	357	261	96	22	32	22
1965	8,386	4,137	4,249	2,400	2,332	182	135	153	714	481	232	54	109	30
1970	10,533	4,904	5,629	2,457	3,080	183	155	182	1,054	680	374	77	164	43
1975	13,520	6,134	7,385	2,618	3,606	221	182	176	1,750	1,080	671	137	250	66
1980	16,314	7,286	9,028	2,736	4,033	239	184	134	2,061	1,257	804	154	228	80
1985	19,132	8,601	10,531	2,861	4,606	158	131	74	2,039	1,267	772	84	140	76
1986	19,664	8,849	10,816	2,883	4,666	151	123	68	2,096	1,301	795	82	136	74
1987	20,137	9,064	11,074	2,893	4,709	141	115	62	2,154	1,338	816	79	132	74
1988	20,567	9,264	11,302	2,896	4,749	137	112	61	2,194	1,353	841	77	125	71
1989	21,036	9,495	11,541	2,903	4,788	137	109	58	2,262	1,390	872	75	120	67
1990	21,537	9,752	11,786	2,914	4,825	133	106	57	2,370	1,448	922	75	118	63
1991	21,978	9,985	11,992	2,918	4,850	130	106	55	2,523	1,529	994	76	119	61
1992	22,434	10,218	12,216	2,928	4,871	129	103	54	2,738	1,643	1,094	78	125	61
1993	22,796	10,404	12,392	2,912	4,870	126	103	53	2,935	1,743	1,192	78	127	59
1994	23,124	10,573	12,552	2,885	4,862	123	100	51	3,121	1,830	1,292	76	128	57
1995	23,433	10,732	12,701	2,845	4,841	120	97	49	3,305	1,909	1,396	75	124	55
1996	23,705	10,874	12,831	2,799	4,815	117	78	41	3,473	1,973	1,500	61	104	53
1997	24,124	11,027	13,097	2,759	4,657	113	74	37	3,593	2,006	1,588	57	91	53
1998	24,409	11,163	13,246	2,703	4,589	111	69	34	3,769	2,074	1,695	52	80	53
1999	24,730	11,337	13,394	2,651	4,536	107	67	32	3,924	2,131	1,793	49	72	52
2000	25,452	11,780	13,672	2,638	4,491	102	65	30	4,080	2,191	1,890	45	65	50
2001	25,838	11,990	13,848	2,581	4,416	98	63	29	4,292	2,282	2,010	43	60	51
2002	26,247	12,218	14,029	2,525	4,353	98	62	28	4,536	2,391	2,145	41	56	50
2003	26,664	12,420	14,224	2,468	4,286	96	61	27	4,832	2,532	2,301	40	55	53
2004	27,114	12,654	14,460	2,416	4,216	93	59	26	5,133	2,668	2,464	38	52	60
2005	27,659	12,916	14,743	2,368	4,140	90	56	26	5,423	2,797	2,626	36	51	67
2006	28,198	13,174	15,024	2,324	4,059	89	54	24	5,703	2,918	2,784	35	46	71
2007	28,791	13,461	15,330	2,281	3,995	86	52	23	5,975	3,042	2,933	33	43	72
2008	29,570	13,847	15,723	2,216	3,925	84	50	22	6,279	3,181	3,098	32	41	78
2009	30,416	14,227	16,189	2,182	3,851	85	50	22	6,396	3,261	3,135	31	40	76
Average monthly family benefit (dollars)														
1945	23.50	24.50	19.50	38.50	20.20	34.10	47.70	50.40	...	...	...	...	...	...
1950	42.20	44.60	34.80	71.70	36.50	76.90	93.90	92.40	...	...	...	...	...	...
1955	59.10	64.60	49.80	103.50	48.70	106.80	135.40	133.20	...	...	...	...	...	...
1960	69.90	79.90	59.60	123.90	57.70	131.70	188.00	181.70	87.90	91.90	76.90	184.70	192.20	135.50
1965	80.10	90.50	70.00	141.50	73.90	153.00	219.80	218.10	95.40	100.70	85.00	201.00	216.30	145.90
1970	114.20	128.70	101.60	198.90	102.40	213.00	291.10	289.90	128.10	136.30	113.10	264.10	273.20	199.20
1975	201.60	225.50	181.80	343.90	195.90	367.20	468.60	461.80	218.90	240.00	185.00	441.00	454.00	344.00
1980	333.00	377.10	297.40	566.60	311.60	612.80	759.20	740.50	355.40	396.20	291.70	727.00	746.10	573.00
1985	465.80	531.80	412.00	813.90	434.30	829.60	981.50	924.90	466.90	523.10	374.60	898.10	895.20	765.00
1986	475.20	542.60	420.10	831.30	444.90	841.70	994.00	939.80	470.70	527.80	377.40	896.90	888.30	773.30
1987	499.20	570.40	440.80	873.30	468.70	882.10	1,032.30	968.90	491.60	552.00	392.60	929.40	918.30	815.50
1988	522.70	597.20	461.70	914.10	493.60	921.80	1,070.40	1,012.90	512.20	576.10	409.50	960.20	938.40	855.40
1989	552.10	630.70	487.40	965.60	522.80	967.80	1,120.00	1,064.60	539.30	607.10	431.20	1,009.40	971.90	903.70
1990	588.30	671.90	519.10	1,026.60	557.90	1,020.20	1,177.70	1,124.60	570.40	642.80	456.80	1,062.10	1,016.00	960.80
1991	614.70	702.00	542.10	1,071.70	584.90	1,059.80	1,216.80	1,160.60	592.30	668.40	475.50	1,098.00	1,043.30	1,004.70
1992	637.80	728.10	562.30	1,110.50	609.00	1,086.90	1,252.40	1,190.80	609.50	688.70	490.70	1,122.10	1,057.40	1,045.00
1993	659.10	751.90	581.20	1,145.40	632.20	1,114.20	1,282.60	1,229.40	625.50	707.20	506.00	1,143.00	1,074.20	1,078.20
1994	682.30	777.80	601.80	1,183.70	657.10	1,150.10	1,328.40	1,271.00	646.20	731.80	525.00	1,177.60	1,100.00	1,118.60

(Continued)

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H1—Number and average monthly family benefit for selected family groups, December 1945–2009, selected years—Continued

Year	Retired-worker families				Survivor families				Disabled-worker families					
	Worker only			Worker and wife ^a	Non-disabled widow only	Widowed mother or father and—			Worker only			Worker, wife, ^b and—		Worker and spouse
	All	Men	Women			1 child	2 children	3 or more children	All	Men	Women	1 child	2 or more children	
<i>Average monthly family benefit (dollars) (cont.)</i>														
1995	704.80	803.00	621.80	1,220.60	681.60	1,184.50	1,365.50	1,299.80	667.60	757.40	544.80	1,205.50	1,130.90	1,159.90
1996	730.00	831.10	644.20	1,262.10	708.70	1,222.50	1,450.60	1,347.20	690.60	785.30	566.00	1,245.90	1,148.50	1,200.60
1997	750.20	853.70	663.10	1,294.60	733.20	1,250.30	1,502.60	1,358.00	708.00	806.60	583.60	1,280.20	1,165.90	1,238.50
1998	765.10	870.50	676.40	1,317.70	750.90	1,277.00	1,537.70	1,393.20	720.00	820.20	597.40	1,300.40	1,189.40	1,261.90
1999	789.80	898.60	697.70	1,356.80	776.60	1,325.40	1,590.40	1,446.30	741.20	844.50	618.50	1,344.90	1,224.20	1,295.30
2000	830.10	945.90	730.30	1,419.90	812.30	1,387.90	1,675.40	1,513.20	773.60	880.70	649.40	1,394.20	1,274.30	1,355.50
2001	860.20	979.90	756.60	1,465.50	842.90	1,439.70	1,755.10	1,600.60	801.20	911.00	676.60	1,440.70	1,317.90	1,405.70
2002	881.30	1,003.80	774.60	1,494.20	863.40	1,473.20	1,812.10	1,664.50	820.50	931.90	696.40	1,468.10	1,352.50	1,449.20
2003	908.70	1,035.20	798.30	1,534.90	890.50	1,525.40	1,881.00	1,724.20	848.00	962.50	722.00	1,517.70	1,409.60	1,497.50
2004	941.90	1,073.20	826.90	1,585.40	922.40	1,588.30	1,952.80	1,803.40	880.20	998.00	752.50	1,572.90	1,463.30	1,566.50
2005	989.00	1,126.80	868.30	1,660.30	969.10	1,663.30	2,061.30	1,885.40	923.20	1,045.60	792.80	1,652.00	1,540.90	1,668.50
2006	1,031.30	1,174.70	905.70	1,726.10	1,009.80	1,737.10	2,146.70	1,980.80	961.10	1,089.10	827.00	1,729.60	1,606.00	1,743.80
2007	1,065.90	1,213.50	936.20	1,775.90	1,042.40	1,791.90	2,221.10	2,051.10	987.40	1,116.90	853.10	1,775.80	1,655.60	1,796.60
2008	1,140.20	1,297.40	1,001.90	1,894.30	1,114.20	1,910.50	2,371.80	2,187.80	1,045.20	1,179.70	907.20	1,888.20	1,759.10	1,911.80
2009	1,153.40	1,312.40	1,013.70	1,912.90	1,125.20	1,939.80	2,403.30	2,212.40	1,058.40	1,187.80	923.80	1,908.80	1,778.40	1,953.50

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1945–1984 are based on various sampling rates. Data for 1985–2005 are based on a 10 percent sample. All other years are 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Wife's entitlement based on age.

b. Wife's entitlement based on care of children.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H2—Number, average primary insurance amount, and average monthly family benefit for selected family groups, December 2009

Family group	Number (thousands)		Average primary insurance amount (dollars)	Average monthly family benefit (dollars)
	Families	Beneficiaries		
<i>Retired-worker families</i>				
Worker only	30,416	30,416	1,189.20	1,153.40
Men	14,227	14,227	1,474.30	1,312.40
Full benefit	3,965	3,965	1,501.30	1,541.80
Reduced benefit	10,262	10,262	1,463.90	1,223.80
Women	16,189	16,189	938.60	1,013.70
Full benefit	3,819	3,819	1,017.10	1,165.50
Reduced benefit	12,370	12,370	914.40	966.80
Worker and wife	2,182	4,369	1,458.80	1,912.90
Full worker benefit	734	1,470	1,479.30	2,158.20
Reduced worker benefit	1,448	2,898	1,448.30	1,788.50
Worker and husband	51	103	749.20	1,035.60
Worker and children	364	792	1,393.80	1,937.00
Male worker	312	681	1,447.00	2,007.90
Full worker benefit	85	184	1,480.80	2,255.60
Reduced worker benefit	227	497	1,434.40	1,915.40
Female worker	52	112	1,073.60	1,510.40
Full worker benefit	14	29	1,087.10	1,690.00
Reduced worker benefit	38	83	1,068.90	1,447.00
Worker, wife, and children	87	284	1,470.20	2,394.00
Worker, wife, and 1 child	72	218	1,478.30	2,394.60
Full worker benefit	21	64	1,490.10	2,624.10
Reduced worker benefit	51	154	1,473.40	2,299.40
Worker, wife, and 2 or more children	15	66	1,431.60	2,391.00
Full worker benefit	4	18	1,484.70	2,714.00
Reduced worker benefit	11	48	1,411.20	2,266.50
<i>Survivor families</i>				
Nondisabled widow(er) only	3,910	3,910	1,339.60	1,122.70
Full benefit	1,617	1,617	1,304.60	1,221.30
Reduced benefit	2,292	2,292	1,364.30	1,053.10
Nondisabled widow(er) and children	93	193	1,251.70	1,947.80
Full benefit	52	107	1,207.10	1,983.50
Reduced benefit	41	86	1,307.60	1,902.90
Disabled widow(er) only	213	213	1,339.00	682.60
Widowed mother or father and children	159	421	1,319.00	2,110.10
1 child	85	171	1,299.20	1,939.80
2 children	50	152	1,379.50	2,403.30
3 or more children	22	96	1,275.60	2,212.40
Children only	1,111	1,464	1,062.50	970.00
1 child	855	855	1,067.40	776.70
2 children	186	372	1,058.50	1,575.10
3 or more children	70	237	1,014.40	1,719.20
Parents	2	2	1,229.60	1,137.10
<i>Disabled-worker families</i>				
Worker only	6,396	6,396	1,063.20	1,058.40
Men	3,261	3,261	1,194.20	1,187.80
Women	3,135	3,135	927.00	923.80
Worker and spouse ^a	76	153	1,610.60	1,953.50
Worker and children	987	2,494	1,136.70	1,642.90
Male worker	583	1,478	1,210.90	1,768.90
Female worker	404	1,016	1,029.60	1,460.90
Worker, wife, and children	71	280	1,243.40	1,834.80
1 child	31	92	1,285.60	1,908.80
2 or more children	40	187	1,211.20	1,778.40
Worker, husband, and children	2	7	1,058.90	1,520.90

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: The term "full benefit" applies to benefits not subject to actuarial reduction, and the term "reduced benefit" applies to benefits subject to actuarial reduction.

Totals do not necessarily equal the sum of rounded components.

a. Where the disabled worker's spouse is dually entitled as a retired worker, the benefit amount shown for the spouse represents the difference between the entitlement amount as a spouse and as a retired worker.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H3—Percentage distribution of retired-worker and disabled-worker families, by monthly benefit for selected family groups, December 2009

Monthly family benefit ^a (dollars)	Retired worker only		Retired worker and wife	Retired worker, wife, and—		Disabled worker only		Disabled worker, wife, and—	
	Men	Women		1 child	2 or more children	Men	Women	1 child	2 or more children
Total									
Number	14,226,977	16,188,891	2,181,565	72,256	15,135	3,260,853	3,135,278	30,750	40,307
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 200.00	0.9	1.0	0.5	0.1	0.1	0.3	0.7	0.1	0.1
200.00–249.90	0.7	0.7	0.3	0.1	0.2	0.5	1.1	0.0	0.0
250.00–299.90	0.8	0.9	0.4	0.2	0.2	0.8	1.6	0.0	0.0
300.00–349.90	0.8	1.0	0.5	0.2	0.2	0.9	1.9	0.0	0.1
350.00–399.90	0.8	1.1	0.6	0.2	0.4	1.0	2.1	0.0	0.0
400.00–449.90	0.8	1.3	0.6	0.3	0.4	1.3	2.5	0.1	0.0
450.00–499.90	0.9	1.7	0.6	0.4	0.4	1.3	2.5	0.1	0.1
500.00–549.90	1.2	2.7	0.6	0.3	0.4	1.4	2.7	0.1	0.1
550.00–599.90	1.4	3.7	0.6	0.4	0.5	2.2	3.9	0.1	0.1
600.00–649.90	1.5	4.9	0.6	0.5	0.6	2.7	4.6	0.4	0.3
650.00–699.90	1.6	5.5	0.7	0.4	0.6	3.7	6.6	0.6	0.8
700.00–749.90	1.7	5.6	0.8	0.5	0.5	4.0	6.7	1.1	1.4
750.00–799.90	1.8	5.4	1.0	0.7	0.6	4.1	6.4	1.1	1.5
800.00–849.90	1.9	5.1	1.1	0.8	1.0	4.1	5.9	1.3	1.7
850.00–899.90	2.1	4.5	1.1	1.0	1.5	4.0	5.5	1.5	1.9
900.00–949.90	2.3	4.2	1.2	1.1	1.5	4.0	5.0	1.5	2.0
950.00–999.90	2.5	4.0	1.2	1.1	1.7	3.9	4.6	1.6	2.2
1,000.00–1,049.90	2.7	3.9	1.2	1.1	1.6	3.8	4.2	1.6	2.2
1,050.00–1,099.90	3.0	3.8	1.2	1.1	1.4	3.7	3.8	1.7	2.2
1,100.00–1,149.90	3.4	3.8	1.2	1.1	1.6	3.5	3.4	1.8	2.3
1,150.00–1,199.90	3.7	3.7	1.2	1.0	1.5	3.4	3.0	1.9	2.2
1,200.00–1,249.90	4.0	3.6	1.3	0.9	1.3	3.3	2.7	2.2	2.6
1,250.00–1,299.90	4.8	3.5	1.3	0.9	1.1	3.2	2.3	2.4	2.6
1,300.00–1,349.90	4.9	3.3	1.4	0.9	1.1	3.0	2.1	2.3	2.7
1,350.00–1,399.90	4.6	2.9	1.4	0.8	1.0	2.8	1.8	2.5	2.7
1,400.00–1,449.90	4.9	2.7	1.5	0.9	0.9	2.7	1.6	2.5	2.9
1,450.00–1,499.90	4.9	2.5	1.6	0.9	1.0	2.6	1.4	2.9	3.5
1,500.00–1,549.90	4.7	2.1	1.7	0.9	1.0	2.5	1.2	3.3	3.6
1,550.00–1,599.90	4.5	1.9	1.8	0.8	1.1	2.5	1.2	3.2	3.6
1,600.00–1,649.90	4.1	1.7	2.0	1.0	1.1	2.5	1.1	3.1	3.4
1,650.00–1,699.90	3.4	1.3	2.2	1.0	1.0	2.2	0.9	3.0	3.2
1,700.00–1,749.90	2.7	1.1	2.5	0.9	1.0	2.1	0.8	2.7	3.2
1,750.00–1,799.90	2.2	0.9	2.6	1.1	1.1	1.9	0.7	2.6	2.8
1,800.00–1,849.90	1.9	0.7	2.9	1.1	1.0	1.9	0.7	2.7	2.8
1,850.00–1,899.90	1.8	0.6	3.4	1.3	1.1	2.3	0.8	2.6	2.4
1,900.00–1,949.90	1.6	0.5	3.7	1.2	1.1	2.1	0.6	2.4	2.4
1,950.00–1,999.90	1.4	0.4	3.7	1.3	1.3	1.7	0.5	2.3	2.2
2,000.00–2,049.90	1.2	0.3	3.5	1.6	1.2	1.4	0.3	2.3	2.0
2,050.00–2,099.90	1.1	0.3	3.4	1.7	1.3	1.2	0.2	2.1	2.0
2,100.00–2,149.90	1.0	0.2	3.2	1.8	1.2	1.0	0.2	2.0	1.9
2,150.00–2,199.90	0.8	0.2	3.1	2.0	1.4	0.8	0.1	2.0	1.7
2,200.00–2,249.90	0.7	0.1	3.0	2.1	1.7	0.6	0.1	1.9	1.5

(Continued)

Table 5.H3—Percentage distribution of retired-worker and disabled-worker families, by monthly benefit for selected family groups, December 2009—Continued

Monthly family benefit ^a (dollars)	Retired worker only		Retired worker and wife	Retired worker, wife, and—		Disabled worker only		Disabled worker, wife, and—	
	Men	Women		1 child	2 or more children	Men	Women	1 child	2 or more children
2,250.00–2,299.90	^b 2.1	^b 0.4	2.8	2.4	1.8	^b 0.9	^b 0.1	1.8	1.6
2,300.00–2,349.90	2.8	2.4	1.9	...	...	1.7	1.3
2,350.00–2,399.90	2.6	2.6	1.8	...	...	1.7	1.4
2,400.00–2,449.90	2.4	2.8	1.9	...	...	1.6	1.2
2,450.00–2,499.90	2.2	2.8	2.1	...	...	1.8	1.2
2,500.00–2,549.90	1.9	2.8	2.1	...	...	1.5	1.1
2,550.00–2,599.90	1.7	2.8	2.1	...	...	1.5	1.1
2,600.00–2,649.90	1.5	2.7	2.0	...	...	1.5	1.0
2,650.00–2,699.90	1.4	2.5	2.0	...	...	1.4	1.0
2,700.00–2,749.90	1.2	2.5	1.7	...	...	1.4	1.0
2,750.00–2,799.90	1.1	2.4	1.9	...	...	1.6	1.2
2,800.00–2,849.90	1.0	2.4	2.0	...	...	1.4	1.2
2,850.00–2,899.90	0.9	2.5	2.2	...	...	1.4	1.1
2,900.00 or more	7.8	28.7	33.4	...	...	10.5	7.8
Average monthly family benefit (dollars)	1,312.40	1,013.70	1,912.90	2,394.60	2,391.00	1,187.80	923.80	1,908.80	1,778.40

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

- a. Cases involving actuarial reduction may be represented in all benefit intervals for which values are shown.
- b. \$2,250 or more.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H4—Percentage distribution of survivor families, by monthly benefit for selected family groups, December 2009

Monthly family benefit (dollars)	Widowed mother or father and—			Children only			Widow only	
	1 child	2 children	3 or more children	1 child	2 children	3 or more children	Nondisabled	Disabled
Total								
Number	85,231	50,404	21,575	855,142	186,176	70,180	3,851,009	202,736
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 200.00	0.1	0.1	0.0	2.8	0.1	0.1	0.7	7.9
200.00–249.90	0.1	0.1	0.1	1.7	0.3	0.3	0.4	3.4
250.00–299.90	0.2	0.1	0.2	1.8	0.6	0.6	0.7	3.8
300.00–349.90	0.3	0.2	0.3	2.1	0.8	1.0	0.9	4.0
350.00–399.90	0.3	0.2	0.4	2.1	1.0	1.2	1.0	4.2
400.00–449.90	0.3	0.3	0.5	6.4	1.1	1.3	1.3	4.8
450.00–499.90	0.4	0.3	0.4	4.7	1.1	1.3	1.5	5.4
500.00–549.90	0.4	0.4	0.5	6.1	1.1	1.4	1.8	5.5
550.00–599.90	0.5	0.3	0.6	5.9	1.2	1.4	2.0	5.5
600.00–649.90	0.6	0.4	0.6	5.8	1.6	1.6	2.2	5.3
650.00–699.90	0.5	0.4	0.5	5.9	1.3	1.4	2.4	5.1
700.00–749.90	0.6	0.4	0.6	5.4	1.3	1.5	2.7	4.8
750.00–799.90	0.6	0.5	0.7	5.9	1.3	1.4	3.1	4.6
800.00–849.90	0.7	0.5	0.7	5.5	1.4	1.5	3.3	4.3
850.00–899.90	1.0	0.6	1.0	4.8	1.8	1.7	3.8	3.9
900.00–949.90	1.1	0.8	0.9	4.4	1.9	1.9	4.0	3.5
950.00–999.90	1.3	1.1	1.2	4.0	2.3	2.3	4.3	3.2
1,000.00–1,049.90	1.9	1.4	2.1	3.6	3.5	3.6	4.8	2.9
1,050.00–1,099.90	2.1	1.6	2.3	3.4	3.4	3.9	5.2	2.6
1,100.00–1,149.90	2.1	1.7	2.4	3.0	3.5	3.6	5.7	2.5
1,150.00–1,199.90	2.2	1.7	2.4	2.7	3.4	3.4	5.9	2.2
1,200.00–1,249.90	2.3	1.7	2.7	2.4	3.3	3.4	5.4	1.8
1,250.00–1,299.90	2.2	1.7	2.4	1.7	3.2	3.1	5.0	1.6
1,300.00–1,349.90	2.3	1.6	2.3	1.4	3.2	2.9	4.9	1.7
1,350.00–1,399.90	2.6	1.6	2.1	1.3	3.1	2.7	4.2	1.6
1,400.00–1,449.90	2.5	1.3	1.6	1.3	2.9	1.9	3.6	1.2
1,450.00–1,499.90	2.6	1.1	1.4	1.0	2.9	1.6	3.2	0.9
1,500.00–1,549.90	2.5	1.2	1.4	0.8	2.8	1.6	2.9	0.7
1,550.00–1,599.90	2.6	1.3	1.4	0.6	2.6	1.5	2.6	0.5
1,600.00–1,649.90	2.6	1.3	1.5	0.4	2.5	1.5	2.2	0.3
1,650.00–1,699.90	2.6	1.4	1.3	0.4	2.4	1.4	1.6	0.1
1,700.00–1,749.90	2.5	1.3	1.5	0.3	2.3	1.5	1.3	0.0
1,750.00–1,799.90	2.6	1.3	1.4	^a 0.3	2.1	1.4	1.0	^a 0.0
1,800.00–1,849.90	2.5	1.5	1.4	...	2.0	1.3	0.8	...
1,850.00–1,899.90	2.4	1.4	1.4	...	1.9	1.4	0.6	...
1,900.00–1,949.90	2.3	1.4	1.5	...	1.9	1.3	0.5	...
1,950.00–1,999.90	2.3	1.5	1.5	...	1.7	1.3	0.4	...
2,000.00–2,049.90	2.1	1.5	1.5	...	1.6	1.2	0.3	...
2,050.00–2,099.90	2.2	1.4	1.4	...	1.5	1.1	0.3	...
2,100.00–2,149.90	2.1	1.4	1.4	...	1.4	1.2	0.2	...
2,150.00–2,199.90	2.0	1.6	1.4	...	1.3	1.1	0.2	...
2,200.00–2,249.90	1.9	1.4	1.3	...	1.3	1.1	0.2	...

(Continued)

Table 5.H4—Percentage distribution of survivor families, by monthly benefit for selected family groups, December 2009—Continued

Monthly family benefit (dollars)	Widowed mother or father and—			Children only			Widow only	
	1 child	2 children	3 or more children	1 child	2 children	3 or more children	Nondisabled	Disabled
2,250.00–2,299.90	1.8	1.6	1.4	...	1.2	1.1	^b 0.7	...
2,300.00–2,349.90	1.8	1.5	1.4	...	1.1	1.1	...	...
2,350.00–2,399.90	1.9	1.4	1.3	...	1.1	1.0	...	...
2,400.00–2,449.90	1.8	1.6	1.4	...	1.1	1.1	...	...
2,450.00–2,499.90	1.7	1.6	1.4	...	1.0	1.0	...	...
2,500.00–2,549.90	1.6	1.7	1.6	...	0.9	1.1	...	...
2,550.00–2,599.90	1.6	2.3	1.7	...	0.8	1.3	...	...
2,600.00–2,649.90	1.4	2.5	2.1	...	0.8	1.4	...	...
2,650.00–2,699.90	1.4	2.2	2.0	...	0.8	1.2	...	...
2,700.00–2,749.90	1.3	2.2	2.0	...	0.7	1.2	...	...
2,750.00–2,799.90	1.7	2.0	1.7	...	0.9	1.1	...	...
2,800.00–2,849.90	1.7	1.9	1.6	...	0.9	1.0	...	...
2,850.00–2,899.90	1.6	1.8	1.3	...	0.9	1.0	...	...
2,900.00 or more	12.3	32.4	26.8	...	6.1	13.3	...	...
Average monthly family benefit (dollars)	1,939.80	2,403.30	2,212.40	776.70	1,575.10	1,719.20	1,125.20	691.70

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. \$1,750 or more.

b. \$2,250 or more.

CONTACT: Diane Wallace (410) 965-0165 or supplement@ssa.gov.

5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J1—Estimated total annual benefits paid, by state or other area and program, 2009
(in millions of dollars)**

State or area	Total, OASDI	Retirement	Survivors	Disability
All areas	675,288	451,579	105,380	118,329
Alabama	12,209	7,119	2,042	3,048
Alaska	907	591	143	173
Arizona	13,457	9,429	1,845	2,183
Arkansas	7,480	4,468	1,147	1,865
California	61,960	42,779	9,245	9,936
Colorado	8,472	5,855	1,283	1,334
Connecticut	8,663	6,293	1,181	1,189
Delaware	2,294	1,581	316	397
District of Columbia	846	562	127	157
Florida	47,205	33,803	6,462	6,940
Georgia	17,750	11,386	2,816	3,548
Hawaii	2,813	2,117	357	339
Idaho	3,237	2,217	481	539
Illinois	26,766	18,246	4,437	4,083
Indiana	15,595	10,408	2,532	2,655
Iowa	7,463	5,241	1,235	987
Kansas	6,311	4,344	1,008	959
Kentucky	10,643	5,961	1,839	2,843
Louisiana	9,307	5,195	2,069	2,043
Maine	3,521	2,250	501	770
Maryland	10,991	7,600	1,706	1,685
Massachusetts	14,610	9,842	2,043	2,725
Michigan	26,291	17,442	4,196	4,653
Minnesota	11,237	7,953	1,647	1,637
Mississippi	6,948	4,002	1,174	1,772
Missouri	14,493	9,397	2,274	2,822
Montana	2,311	1,584	367	360
Nebraska	3,894	2,714	631	549
Nevada	5,092	3,585	660	847
New Hampshire	3,262	2,230	410	622
New Jersey	20,623	14,749	2,900	2,974
New Mexico	4,165	2,706	648	811
New York	43,521	29,823	6,153	7,545
North Carolina	21,555	14,210	2,915	4,430
North Dakota	1,455	986	287	182
Ohio	27,058	17,772	5,020	4,266
Oklahoma	8,595	5,459	1,444	1,692
Oregon	8,952	6,299	1,281	1,372
Pennsylvania	33,898	22,905	5,565	5,428
Rhode Island	2,601	1,782	330	489
South Carolina	11,299	7,316	1,610	2,373
South Dakota	1,820	1,277	306	237
Tennessee	15,226	9,630	2,391	3,205
Texas	41,291	26,383	7,429	7,479
Utah	3,993	2,777	622	594
Vermont	1,580	1,081	219	280
Virginia	16,059	10,684	2,419	2,956
Washington	14,011	9,752	1,974	2,285
West Virginia	5,616	3,078	1,069	1,469
Wisconsin	13,691	9,604	2,036	2,051
Wyoming	1,148	800	179	169

(Continued)

**Table 5.J1—Estimated total annual benefits paid, by state or other area and program, 2009
(in millions of dollars)—Continued**

State or area	Total, OASDI	Retirement	Survivors	Disability
Outlying areas				
American Samoa	45	17	13	15
Guam	117	70	28	19
Northern Mariana Islands	16	9	5	2
Puerto Rico	6,874	3,552	1,193	2,129
U.S. Virgin Islands	207	150	29	28
Foreign countries	3,842	2,512	1,141	189

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Unnegotiated checks are not deducted. Excludes lump-sum death payments.

Totals do not necessarily equal the sum of rounded components.

CONTACT: Shirley Turpin (410) 965-0181 or supplement@ssa.gov.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J2—Number, by state or other area, program, and type of benefit, December 2009

State or area	Total	Retirement			Survivors		Disability		
		Retired workers	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
All areas	52,522,819	33,514,013	2,343,601	561,451	4,488,492	1,921,148	7,788,013	158,122	1,747,979
Alabama	983,341	543,725	37,930	10,359	91,034	43,329	204,573	4,173	48,218
Alaska	74,678	46,498	2,582	1,474	5,126	4,597	11,572	225	2,604
Arizona	1,028,442	693,216	43,559	9,745	76,096	34,533	138,396	2,484	30,413
Arkansas	620,040	352,317	21,888	5,978	52,593	24,791	128,375	2,680	31,418
California	4,835,164	3,182,221	256,083	63,708	383,550	167,897	639,263	12,213	130,229
Colorado	663,894	443,673	31,439	6,219	53,252	22,664	87,987	1,349	17,311
Connecticut	611,276	428,877	20,604	6,550	43,845	19,570	74,153	947	16,730
Delaware	167,530	111,912	5,703	1,359	12,258	5,735	24,937	281	5,345
District of Columbia	73,093	47,343	1,751	838	5,471	3,922	11,948	43	1,777
Florida	3,669,375	2,536,392	153,355	36,364	277,117	107,322	458,526	8,151	92,148
Georgia	1,412,978	872,059	47,712	15,562	117,937	65,943	236,868	4,149	52,748
Hawaii	220,491	160,553	7,970	3,359	15,485	6,354	21,698	406	4,666
Idaho	258,691	169,173	12,079	2,607	20,104	8,639	36,525	859	8,705
Illinois	1,993,199	1,306,280	84,144	22,774	176,524	77,004	262,227	4,642	59,604
Indiana	1,157,821	735,047	46,091	10,811	100,522	45,639	175,035	3,345	41,331
Iowa	574,315	388,139	26,522	5,087	52,462	18,233	68,425	1,084	14,363
Kansas	478,138	314,968	19,281	4,378	40,996	17,218	65,631	915	14,751
Kentucky	870,206	461,223	39,236	7,877	86,110	35,096	190,170	5,601	44,893
Louisiana	770,217	401,165	47,186	9,285	94,302	43,395	135,077	4,567	35,240
Maine	293,011	180,317	11,237	2,534	22,685	8,333	53,959	907	13,039
Maryland	826,497	555,790	30,310	8,042	66,708	34,155	108,605	1,118	21,769
Massachusetts	1,117,870	724,674	39,199	10,888	82,792	34,016	179,409	2,031	44,861
Michigan	1,905,342	1,194,623	85,345	21,269	164,633	71,200	293,299	6,055	68,918
Minnesota	857,805	584,560	36,108	7,579	68,615	25,937	109,472	1,259	24,275
Mississippi	583,515	318,734	19,028	7,366	52,139	31,027	121,217	2,718	31,286
Missouri	1,137,581	707,487	42,805	10,416	95,774	44,086	190,813	3,260	42,940
Montana	187,197	123,975	8,718	2,011	15,886	6,414	24,865	546	4,782
Nebraska	303,880	203,762	13,473	2,694	26,866	9,941	38,133	549	8,462
Nevada	390,553	269,889	13,662	3,912	26,345	12,847	52,776	734	10,388
New Hampshire	245,563	161,891	7,500	1,894	16,032	6,817	39,678	488	11,263
New Jersey	1,440,943	995,695	51,196	15,534	110,859	47,312	176,927	3,091	40,329
New Mexico	347,976	213,959	17,672	3,765	29,048	14,700	55,815	1,272	11,745
New York	3,214,780	2,100,332	128,460	40,198	248,238	104,996	470,783	9,578	112,195
North Carolina	1,698,677	1,082,726	49,463	15,142	126,002	62,918	296,118	4,664	61,644
North Dakota	118,493	76,872	7,458	1,076	13,412	3,993	12,872	202	2,608
Ohio	2,074,384	1,291,578	111,303	19,514	215,198	77,583	291,040	5,859	62,309
Oklahoma	688,545	419,458	28,862	6,538	63,181	28,613	114,708	2,439	24,746
Oregon	686,777	467,560	29,198	7,176	54,020	19,353	91,803	1,802	15,865
Pennsylvania	2,530,211	1,641,934	108,195	22,347	233,228	82,592	352,884	7,142	81,889
Rhode Island	200,202	133,026	5,209	1,888	13,419	5,872	32,963	369	7,456
South Carolina	889,876	556,444	26,880	8,686	69,929	35,581	156,502	2,691	33,163
South Dakota	150,432	101,648	7,501	1,294	14,168	5,279	16,866	240	3,436
Tennessee	1,212,968	730,711	45,969	11,461	105,359	49,828	217,950	4,537	47,153
Texas	3,320,462	1,995,282	184,491	36,686	324,886	145,016	499,728	12,930	121,443
Utah	312,029	203,464	16,828	3,923	22,829	14,545	39,318	789	10,333
Vermont	124,585	80,961	4,596	1,385	9,409	3,614	19,567	287	4,766
Virginia	1,246,366	799,184	48,755	12,014	103,562	45,335	190,962	3,834	42,720
Washington	1,049,039	698,822	47,275	10,564	80,041	31,476	150,080	2,346	28,435
West Virginia	436,445	225,811	25,266	4,129	49,293	16,802	91,273	3,987	19,884
Wisconsin	1,033,096	697,097	39,012	9,950	82,691	33,175	137,596	2,095	31,480
Wyoming	88,514	59,708	3,832	752	7,225	3,351	11,312	202	2,132

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J2—Number, by state or other area, program, and type of benefit, December 2009—Continued

State or area	Total	Retirement			Survivors		Disability		
		Retired workers	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
Outlying areas									
American Samoa	5,726	1,829	198	363	574	908	1,138	59	657
Guam	13,686	7,442	1,004	545	1,310	1,328	1,418	66	573
Northern Mariana Islands	2,431	1,097	121	250	276	372	218	8	89
Puerto Rico	776,374	377,817	58,913	13,451	80,547	34,181	159,775	9,130	42,560
U.S. Virgin Islands	18,788	12,845	928	493	1,274	958	1,719	64	507
Foreign countries	529,311	320,228	82,516	9,388	85,255	14,813	13,066	660	3,385

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

CONTACT: Shirley Turpin (410) 965-0181 or supplement@ssa.gov.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J3—Number and total monthly benefits for beneficiaries aged 65 or older, by state or other area and sex, December 2009

State or area	Number			Total monthly benefits (thousands of dollars)		
	Total	Men	Women	Total	Men	Women
All areas	36,594,122	15,812,886	20,781,236	41,616,121	20,863,919	20,752,202
Alabama	603,628	253,048	350,580	664,556	328,607	335,950
Alaska	47,821	23,723	24,098	52,608	29,775	22,832
Arizona	730,645	329,924	400,721	853,427	445,268	408,159
Arkansas	386,480	166,483	219,997	414,834	208,459	206,375
California	3,488,517	1,551,926	1,936,591	3,947,606	2,004,000	1,943,607
Colorado	477,256	213,267	263,989	538,168	281,224	256,944
Connecticut	459,881	194,326	265,555	579,507	284,144	295,363
Delaware	116,913	50,897	66,016	142,384	71,923	70,461
District of Columbia	51,479	21,153	30,326	52,713	24,064	28,648
Florida	2,694,725	1,193,941	1,500,784	3,070,525	1,567,364	1,503,161
Georgia	916,186	386,474	529,712	1,031,342	511,117	520,226
Hawaii	166,593	72,781	93,812	188,348	91,699	96,648
Idaho	180,265	82,722	97,543	201,418	108,115	93,303
Illinois	1,433,411	608,811	824,600	1,695,347	835,124	860,224
Indiana	791,781	334,193	457,588	951,508	471,145	480,364
Iowa	427,910	181,196	246,714	485,942	241,742	244,200
Kansas	344,378	146,603	197,775	403,624	200,329	203,295
Kentucky	526,606	225,541	301,065	564,307	284,329	279,977
Louisiana	489,625	209,949	279,676	512,600	263,422	249,177
Maine	195,853	86,026	109,827	208,386	106,684	101,703
Maryland	598,985	252,260	346,725	701,268	339,466	361,802
Massachusetts	796,641	335,123	461,518	923,295	451,729	471,565
Michigan	1,283,186	551,683	731,503	1,571,452	791,697	779,755
Minnesota	629,056	273,063	355,993	726,427	369,704	356,723
Mississippi	349,830	145,545	204,285	371,189	180,978	190,211
Missouri	767,694	328,389	439,305	867,693	433,998	433,695
Montana	133,236	61,150	72,086	145,231	77,061	68,170
Nebraska	226,192	96,247	129,945	254,504	126,764	127,740
Nevada	277,638	132,586	145,052	321,686	174,119	147,567
New Hampshire	169,238	74,575	94,663	202,430	104,139	98,291
New Jersey	1,069,348	445,642	623,706	1,352,007	649,947	702,060
New Mexico	234,380	105,536	128,844	248,533	129,458	119,075
New York	2,273,704	951,026	1,322,678	2,722,684	1,300,958	1,421,726
North Carolina	1,123,672	473,166	650,506	1,275,980	625,424	650,556
North Dakota	90,175	38,874	51,301	94,634	47,937	46,696
Ohio	1,466,804	624,823	841,981	1,673,741	842,969	830,771
Oklahoma	463,341	199,531	263,810	510,177	254,664	255,513
Oregon	491,947	218,592	273,355	568,356	291,935	276,420
Pennsylvania	1,814,653	755,646	1,059,007	2,131,598	1,039,552	1,092,046
Rhode Island	141,141	58,042	83,099	163,502	78,118	85,384
South Carolina	578,014	247,345	330,669	657,587	330,121	327,467
South Dakota	113,148	49,813	63,335	119,292	61,545	57,747
Tennessee	787,049	334,950	452,099	883,166	440,127	443,039
Texas	2,259,018	995,019	1,263,999	2,488,790	1,285,468	1,203,322
Utah	221,174	99,472	121,702	254,822	135,968	118,853
Vermont	86,174	38,158	48,016	98,514	50,478	48,036
Virginia	863,903	367,620	496,283	984,356	488,198	496,157
Washington	745,854	333,078	412,776	886,706	459,211	427,495
West Virginia	270,612	116,391	154,221	298,265	151,071	147,194
Wisconsin	739,768	319,397	420,371	868,312	438,058	430,254
Wyoming	63,654	29,281	34,373	72,825	39,133	33,692

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J3—Number and total monthly benefits for beneficiaries aged 65 or older, by state or other area and sex, December 2009—Continued

State or area	Number			Total monthly benefits (thousands of dollars)		
	Total	Men	Women	Total	Men	Women
Outlying areas						
American Samoa	2,115	1,016	1,099	1,556	850	706
Guam	8,290	4,082	4,208	6,193	3,480	2,713
Northern Mariana Islands	1,113	598	515	719	450	269
Puerto Rico	458,866	204,933	253,933	335,423	172,267	163,157
U.S. Virgin Islands	13,027	6,103	6,924	12,806	6,742	6,064
Foreign countries	451,529	211,147	240,382	261,252	131,600	129,652

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

CONTACT: Shirley Turpin (410) 965-0181 or supplement@ssa.gov.

5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J4—Total monthly benefits, by state or other area, program, and type of benefit, December 2009
(in thousands of dollars)**

State or area	Total	Retirement			Survivors		Disability		
		Retired workers	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
All areas	55,905,731	39,020,920	1,345,643	320,237	4,893,329	1,435,847	8,288,762	45,306	555,686
Alabama	995,047	614,516	22,300	6,002	91,971	30,517	213,489	1,193	15,060
Alaska	75,477	51,652	1,424	724	5,288	3,363	12,166	62	798
Arizona	1,130,429	824,221	26,059	5,537	85,966	25,537	152,705	745	9,659
Arkansas	611,114	386,561	12,105	3,297	51,954	16,948	130,363	687	9,199
California	5,157,177	3,682,640	141,869	35,237	427,268	128,658	693,865	3,557	44,083
Colorado	709,615	509,759	18,802	3,675	59,536	17,818	93,836	396	5,791
Connecticut	723,023	546,727	13,694	4,123	54,015	16,580	81,737	270	5,876
Delaware	191,920	138,475	3,687	851	14,466	4,549	28,009	79	1,805
District of Columbia	70,001	49,127	1,017	435	5,105	2,437	11,325	15	540
Florida	3,958,307	2,936,441	89,253	20,352	309,822	78,905	491,043	2,347	30,145
Georgia	1,475,429	998,499	28,592	9,085	122,331	47,640	251,229	1,105	16,949
Hawaii	238,128	184,953	4,286	1,909	16,602	4,940	23,802	112	1,523
Idaho	270,393	192,169	7,120	1,486	22,460	6,544	37,900	225	2,489
Illinois	2,205,859	1,569,838	51,432	13,216	205,715	59,983	284,867	1,386	19,421
Indiana	1,288,870	900,026	29,320	6,711	117,012	35,190	186,820	993	12,798
Iowa	616,526	450,416	15,686	2,933	59,579	14,045	69,317	275	4,275
Kansas	522,873	375,211	11,901	2,586	47,462	13,027	67,935	250	4,499
Kentucky	861,173	511,086	21,694	4,395	86,007	24,512	198,009	1,657	13,812
Louisiana	745,801	436,365	26,613	4,969	94,892	29,435	141,497	1,393	10,638
Maine	289,594	194,614	6,444	1,386	23,843	6,157	53,099	244	3,808
Maryland	914,615	662,096	18,737	4,898	75,543	26,513	118,932	347	7,550
Massachusetts	1,207,840	851,453	24,017	6,320	94,632	27,787	188,489	546	14,596
Michigan	2,175,484	1,502,388	54,826	13,484	194,832	56,863	329,062	1,891	22,139
Minnesota	938,896	691,140	21,634	4,475	77,968	20,647	115,225	334	7,475
Mississippi	564,156	346,176	10,613	3,967	49,834	20,648	122,834	711	9,372
Missouri	1,192,370	812,763	25,444	6,006	104,476	31,835	197,762	878	13,206
Montana	192,091	137,196	4,942	1,080	17,373	4,630	25,313	140	1,418
Nebraska	321,811	233,605	7,869	1,551	30,275	7,432	38,467	135	2,476
Nevada	428,178	314,915	7,997	2,220	29,904	9,976	59,410	232	3,525
New Hampshire	272,608	195,479	4,825	1,183	18,754	5,778	42,833	121	3,634
New Jersey	1,719,218	1,280,706	32,010	9,797	133,669	40,121	206,525	946	15,444
New Mexico	344,768	233,349	9,506	1,967	29,431	9,607	57,091	373	3,443
New York	3,602,818	2,571,969	75,786	23,781	284,350	83,858	522,112	2,806	38,156
North Carolina	1,798,292	1,250,210	29,616	8,943	129,940	45,627	312,753	1,237	19,967
North Dakota	118,640	83,383	4,068	594	14,213	2,867	12,696	56	762
Ohio	2,215,149	1,514,080	67,373	11,538	242,664	58,149	300,962	1,815	18,567
Oklahoma	704,557	470,875	16,484	3,630	66,567	20,281	118,723	682	7,316
Oregon	750,210	547,455	17,663	4,179	62,181	15,042	98,023	519	5,148
Pennsylvania	2,788,542	1,970,246	67,187	13,567	268,187	64,027	377,661	2,051	25,616
Rhode Island	215,857	155,567	3,136	1,077	15,190	4,581	33,886	100	2,321
South Carolina	942,226	643,622	16,333	5,173	71,542	25,658	168,136	728	11,034
South Dakota	150,908	110,086	4,095	666	14,785	3,587	16,645	53	991
Tennessee	1,257,202	837,850	27,425	6,758	108,735	35,162	225,456	1,249	14,568
Texas	3,400,596	2,263,541	103,961	19,716	343,059	104,712	525,413	3,669	36,526
Utah	334,190	238,908	10,610	2,202	26,414	11,308	41,410	223	3,115
Vermont	131,815	94,167	2,733	794	10,357	2,782	19,497	76	1,409
Virginia	1,332,677	930,638	29,228	7,205	110,768	34,647	204,794	1,176	14,221
Washington	1,172,821	845,946	29,612	6,438	93,854	25,090	161,735	711	9,436
West Virginia	448,604	259,271	14,532	2,366	51,799	12,082	100,886	1,348	6,320
Wisconsin	1,140,891	833,550	23,864	5,928	95,943	26,037	145,441	553	9,576
Wyoming	95,541	69,373	2,331	448	8,184	2,533	11,947	55	668

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J4—Total monthly benefits, by state or other area, program, and type of benefit, December 2009
(in thousands of dollars)—Continued**

State or area	Total	Retirement			Survivors		Disability		
		Retired workers	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
Outlying areas									
American Samoa	3,453	1,394	64	125	367	416	946	12	130
Guam	9,465	5,755	353	207	963	737	1,296	15	140
Northern Mariana Islands	1,280	712	35	64	138	161	155	1	15
Puerto Rico	554,150	293,619	21,521	5,031	54,455	17,544	148,756	2,292	10,931
U.S. Virgin Islands	17,428	13,002	440	247	1,112	608	1,843	20	156
Foreign countries	309,625	201,141	21,476	3,704	59,579	9,728	12,634	215	1,148

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

CONTACT: Shirley Turpin (410) 965-0181 or supplement@ssa.gov.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J5—Number, by state or other area and age, December 2009

State or area	Total, all ages	17 or under	18–54	55–61	62–64	65–69	70–74	75–79	80–84	85–89	90–99	100 or older
All areas	52,522,819	3,157,987	4,929,652	2,878,113	4,962,945	10,742,999	8,630,679	6,807,690	5,304,243	3,363,640	1,695,947	48,924
Alabama	983,341	77,421	125,714	77,282	99,296	187,162	149,214	114,275	82,038	47,272	22,942	725
Alaska	74,678	7,256	7,794	4,131	7,676	17,824	12,195	8,199	5,353	2,916	1,303	31
Arizona	1,028,442	60,002	83,369	50,480	103,946	225,385	178,693	136,296	100,238	60,931	28,442	660
Arkansas	620,040	48,425	78,411	46,282	60,442	119,645	94,558	72,476	52,165	31,003	16,093	540
California	4,835,164	275,719	395,998	240,721	434,209	1,013,193	823,090	642,998	502,738	336,034	165,908	4,556
Colorado	663,894	36,436	54,534	31,713	63,955	147,678	113,939	86,856	65,331	41,832	21,093	527
Connecticut	611,276	30,435	49,824	25,150	45,986	123,165	98,839	84,321	73,011	50,949	28,714	882
Delaware	167,530	9,564	15,317	8,924	16,812	36,055	28,247	22,149	15,853	9,805	4,672	132
District of Columbia	73,093	4,883	8,022	4,099	4,610	13,701	12,184	9,342	7,630	5,344	3,127	151
Florida	3,669,375	183,594	271,262	172,232	347,562	764,082	637,551	512,964	404,482	250,531	121,704	3,411
Georgia	1,412,978	103,659	145,153	91,234	156,746	304,550	226,555	164,818	115,780	68,887	34,530	1,066
Hawaii	220,491	11,396	13,617	8,385	20,500	46,553	36,413	30,667	26,389	17,506	8,825	240
Idaho	258,691	15,583	23,051	13,040	26,752	56,779	43,842	32,128	23,913	15,331	8,050	222
Illinois	1,993,199	114,201	176,536	96,716	172,335	403,862	331,993	265,042	215,356	140,962	74,047	2,149
Indiana	1,157,821	71,067	115,959	64,367	114,647	234,630	185,553	145,915	115,929	72,360	36,364	1,030
Iowa	574,315	25,476	46,082	24,895	49,952	112,420	96,712	80,798	66,994	44,774	25,415	797
Kansas	478,138	27,072	43,269	23,232	40,187	93,262	77,939	65,383	52,785	35,140	19,262	607
Kentucky	870,206	65,771	118,702	70,232	88,895	163,913	128,449	97,879	71,988	43,529	20,308	540
Louisiana	770,217	64,442	92,821	52,458	70,871	147,464	119,241	92,678	69,927	40,830	18,936	549
Maine	293,011	17,382	35,709	17,460	26,607	56,991	45,693	36,855	28,900	17,970	9,162	282
Maryland	826,497	49,498	69,876	38,539	69,599	176,272	141,014	109,777	86,396	56,437	28,288	801
Massachusetts	1,117,870	64,843	122,858	55,932	77,596	210,699	173,766	149,314	127,901	87,018	46,484	1,459
Michigan	1,905,342	115,516	190,358	111,528	204,754	381,601	293,014	234,058	191,693	120,822	60,355	1,643
Minnesota	857,805	40,494	74,141	36,826	77,288	178,248	143,721	114,786	92,810	62,375	36,003	1,113
Mississippi	583,515	52,689	76,667	46,563	57,766	107,612	87,306	65,587	47,848	27,201	13,791	485
Missouri	1,137,581	72,053	122,467	68,788	106,579	225,853	180,733	145,118	110,068	69,529	35,274	1,119
Montana	187,197	9,877	15,387	9,361	19,336	41,128	31,794	23,765	18,294	11,613	6,475	167
Nebraska	303,880	15,153	24,960	13,459	24,116	59,581	51,254	43,761	35,154	23,149	12,840	453
Nevada	390,553	22,894	29,287	19,539	41,195	93,733	72,382	50,410	34,223	18,659	8,097	134
New Hampshire	245,563	15,598	26,799	12,194	21,734	50,837	39,151	31,042	24,387	15,493	8,116	212
New Jersey	1,440,943	75,891	112,326	64,200	119,178	294,523	240,914	201,025	166,572	109,063	55,690	1,561
New Mexico	347,976	23,888	34,477	20,384	34,847	72,730	58,055	44,133	31,333	18,944	8,945	240
New York	3,214,780	183,947	302,242	170,657	284,230	632,810	520,853	424,368	346,654	225,303	119,750	3,966
North Carolina	1,698,677	105,219	173,635	111,992	184,159	354,238	272,469	207,320	152,620	91,465	44,232	1,328
North Dakota	118,493	5,008	8,691	4,707	9,912	22,994	19,865	17,366	14,462	9,452	5,819	217
Ohio	2,074,384	110,919	195,509	107,806	193,346	409,887	340,206	275,513	225,656	143,558	70,160	1,824
Oklahoma	688,545	45,713	71,429	42,797	65,265	139,875	113,036	88,512	64,178	38,812	18,428	500
Oregon	686,777	30,953	53,702	35,672	74,503	151,131	113,550	86,583	68,736	46,731	24,617	599
Pennsylvania	2,530,211	133,362	231,385	127,154	223,657	488,394	404,185	343,659	293,449	188,406	94,205	2,355
Rhode Island	200,202	10,982	20,718	11,347	16,014	37,207	29,534	25,646	23,540	16,360	8,605	249
South Carolina	889,876	58,268	91,370	61,672	100,552	190,328	142,247	105,229	73,459	44,908	21,187	656
South Dakota	150,432	6,956	11,140	6,195	12,993	30,817	25,733	21,183	17,130	11,354	6,712	219
Tennessee	1,212,968	82,232	133,682	81,865	128,140	251,253	194,101	145,142	103,701	62,314	29,657	881
Texas	3,320,462	239,675	322,967	184,721	314,081	700,494	553,486	424,330	306,562	184,167	87,448	2,531
Utah	312,029	23,172	27,541	13,318	26,824	67,014	53,991	41,512	31,011	18,652	8,823	171
Vermont	124,585	6,984	13,446	6,418	11,563	26,225	19,817	15,636	12,321	7,823	4,227	125
Virginia	1,246,366	75,461	118,937	70,551	117,514	265,750	209,565	158,711	118,643	74,045	36,107	1,082
Washington	1,049,039	52,041	91,703	54,632	104,809	231,340	173,522	131,259	101,898	69,815	37,070	950
West Virginia	436,445	28,611	53,959	36,996	46,267	81,334	66,103	50,310	39,250	22,901	10,442	272
Wisconsin	1,033,096	51,408	93,097	48,737	100,086	207,677	168,690	137,739	112,102	72,409	40,054	1,097
Wyoming	88,514	4,876	7,077	4,162	8,745	19,889	15,538	11,559	8,720	5,228	2,654	66

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J5—Number, by state or other area and age, December 2009—Continued

State or area	Total, all ages	17 or under	18–54	55–61	62–64	65–69	70–74	75–79	80–84	85–89	90–99	100 or older
Outlying areas												
American Samoa	5,726	1,789	682	570	570	868	632	326	190	77	22	0
Guam	13,686	2,209	1,201	601	1,385	2,785	2,433	1,632	913	411	116	0
Northern Mariana Islands	2,431	645	286	103	284	409	352	198	100	42	12	0
Puerto Rico	776,374	66,010	91,665	66,899	92,934	144,962	117,323	85,841	57,088	34,618	18,282	752
U.S. Virgin Islands	18,788	1,564	1,152	692	2,353	5,055	3,517	2,178	1,252	687	325	13
Foreign countries	529,311	21,805	11,689	7,503	36,785	119,132	115,927	91,123	67,129	39,893	17,738	587

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

CONTACT: Shirley Turpin (410) 965-0181 or supplement@ssa.gov.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J5.1—Number, by state or other area, race, and sex, December 2009

State or area	All races			Adult beneficiaries		
	Total ^a	White	Black	Other ^b	Men	Women
All areas	52,522,819	43,547,872	5,722,458	2,864,708	21,307,655	26,984,586
Alabama	983,341	742,679	231,623	5,537	379,640	501,795
Alaska	74,678	58,172	2,318	13,493	32,965	33,038
Arizona	1,028,442	908,540	32,726	80,654	433,907	519,844
Arkansas	620,040	532,192	79,278	6,161	247,345	310,508
California	4,835,164	3,658,015	347,613	791,536	2,021,416	2,451,914
Colorado	663,894	601,183	24,484	33,183	279,778	337,922
Connecticut	611,276	537,972	46,180	20,081	244,913	323,513
Delaware	167,530	134,614	28,278	3,420	67,981	87,110
District of Columbia	73,093	19,980	50,202	2,431	28,627	37,929
Florida	3,669,375	3,082,407	387,453	171,371	1,539,965	1,893,576
Georgia	1,412,978	1,011,802	368,349	25,262	550,454	728,271
Hawaii	220,491	66,986	2,640	148,733	92,307	113,805
Idaho	258,691	249,066	794	6,957	110,784	127,956
Illinois	1,993,199	1,619,656	275,309	85,595	796,262	1,037,555
Indiana	1,157,821	1,049,901	89,090	11,653	458,403	601,637
Iowa	574,315	554,936	10,399	5,908	232,095	304,537
Kansas	478,138	438,619	25,379	11,557	191,085	250,706
Kentucky	870,206	808,970	52,476	4,532	352,465	429,875
Louisiana	770,217	541,749	216,007	8,465	306,286	376,011
Maine	293,011	287,003	1,272	2,099	122,711	146,394
Maryland	826,497	584,591	207,290	28,878	327,086	435,445
Massachusetts	1,117,870	1,005,735	53,525	44,570	445,277	582,828
Michigan	1,905,342	1,617,567	243,577	29,670	770,248	973,707
Minnesota	857,805	810,552	22,295	17,868	354,633	445,381
Mississippi	583,515	395,060	183,162	3,534	221,719	292,117
Missouri	1,137,581	1,013,563	107,776	11,033	456,527	583,612
Montana	187,197	178,960	468	6,424	81,195	92,795
Nebraska	303,880	285,077	10,895	6,018	121,799	160,984
Nevada	390,553	322,355	29,610	35,907	173,357	190,049
New Hampshire	245,563	239,223	1,584	2,410	100,247	125,342
New Jersey	1,440,943	1,167,251	171,751	88,074	566,482	771,286
New Mexico	347,976	289,786	6,619	49,050	146,643	171,123
New York	3,214,780	2,516,741	421,053	231,276	1,273,752	1,683,639
North Carolina	1,698,677	1,317,826	340,933	30,693	670,328	888,645
North Dakota	118,493	113,940	337	3,327	48,712	62,104
Ohio	2,074,384	1,828,932	209,756	20,458	840,570	1,074,408
Oklahoma	688,545	614,197	44,496	26,923	275,578	353,070
Oregon	686,777	650,896	9,268	21,630	291,366	353,017
Pennsylvania	2,530,211	2,259,763	211,743	42,419	1,003,065	1,340,318
Rhode Island	200,202	182,456	7,498	7,340	78,826	106,160
South Carolina	889,876	659,079	219,176	7,544	352,873	459,573
South Dakota	150,432	142,552	692	6,288	62,898	77,525
Tennessee	1,212,968	1,048,155	150,257	8,930	480,424	624,102
Texas	3,320,462	2,637,859	388,489	278,262	1,346,395	1,670,922
Utah	312,029	294,927	2,240	12,833	127,346	155,882
Vermont	124,585	121,639	559	715	52,018	62,802
Virginia	1,246,366	968,776	233,998	35,416	496,320	649,977
Washington	1,049,039	952,729	29,406	58,883	443,449	535,115
West Virginia	436,445	421,089	11,712	1,566	182,113	213,517
Wisconsin	1,033,096	960,548	47,545	17,087	423,338	535,153
Wyoming	88,514	84,988	574	2,308	38,278	44,001

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J5.1—Number, by state or other area, race, and sex, December 2009—Continued

State or area	All races			Adult beneficiaries		
	Total ^a	White	Black	Other ^b	Men	Women
Outlying areas						
American Samoa	5,726	303	39	5,376	1,813	1,985
Guam	13,686	1,373	196	11,833	5,468	5,772
Northern Mariana Islands	2,431	298	42	2,030	878	842
Puerto Rico	776,374	544,671	51,416	171,911	315,425	370,757
U.S. Virgin Islands	18,788	3,203	14,155	1,193	7,816	9,014
Foreign countries	529,311	406,770	16,456	96,403	234,004	267,721

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

Through 2008, beneficiaries whose record indicated more than one race were classified as "other." Beginning with 2009, these beneficiaries are classified as persons of unknown race.

- a. Includes 387,781 persons of unknown race.
- b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.

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5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J6—Percentage distribution of monthly benefit for retired workers, by state or other area and monthly benefit, December 2009

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)	
		Total	Less than	600.00–	700.00–	800.00–	900.00–	1,000.00–	1,100.00–	1,200.00–	1,300.00–	1,400.00	Average	Median
			600.00	699.90	799.90	899.90	999.90	1,099.90	1,199.90	1,299.90	1,399.90	or more		
All areas	33,514,013	100.0	11.4	6.8	7.2	6.7	6.4	6.6	7.2	7.9	7.9	31.8	1,164.30	1,167.40
Alabama	543,725	100.0	10.8	7.2	8.1	7.7	7.5	7.7	7.9	8.0	7.4	27.6	1,130.20	1,112.50
Alaska	46,498	100.0	16.8	7.2	7.6	7.0	6.4	6.4	6.3	6.2	6.1	29.9	1,110.80	1,077.00
Arizona	693,216	100.0	9.6	6.4	7.0	6.6	6.2	6.6	7.3	8.2	8.5	33.5	1,189.00	1,203.50
Arkansas	352,317	100.0	11.1	7.7	8.5	8.4	8.4	8.4	8.3	8.1	7.3	23.9	1,097.20	1,071.40
California	3,182,221	100.0	15.0	6.8	6.9	6.4	5.9	6.0	6.3	6.7	7.0	32.9	1,157.30	1,147.50
Colorado	443,673	100.0	13.8	6.5	7.0	6.7	6.1	6.2	6.7	7.3	7.5	32.2	1,149.00	1,155.50
Connecticut	428,877	100.0	7.3	5.2	5.9	5.9	5.6	6.1	7.1	8.0	8.6	40.3	1,274.80	1,287.50
Delaware	111,912	100.0	6.9	5.7	6.4	6.2	5.9	6.4	7.5	8.7	9.5	36.9	1,237.40	1,262.50
District of Columbia	47,343	100.0	25.5	7.6	7.3	6.9	6.5	6.0	5.3	4.9	4.4	25.7	1,037.70	943.40
Florida	2,536,392	100.0	10.8	7.2	7.5	7.0	6.6	6.9	7.4	7.9	8.0	30.6	1,157.70	1,154.00
Georgia	872,059	100.0	11.0	6.9	7.8	7.7	7.4	7.3	7.4	7.6	7.4	29.6	1,145.00	1,126.50
Hawaii	160,553	100.0	13.0	6.5	6.7	6.3	6.6	7.1	7.6	8.1	7.3	30.8	1,152.00	1,149.50
Idaho	169,173	100.0	10.7	7.4	7.7	7.1	6.8	7.4	7.9	8.4	8.0	28.6	1,135.90	1,136.50
Illinois	1,306,280	100.0	10.7	6.3	6.7	6.0	5.6	5.9	6.9	7.9	8.2	35.8	1,201.80	1,225.50
Indiana	735,047	100.0	6.5	6.1	6.9	6.1	5.9	6.5	7.8	9.1	9.4	35.7	1,224.40	1,248.50
Iowa	388,139	100.0	8.4	7.2	7.6	6.8	6.7	7.4	8.5	9.4	8.8	29.3	1,160.50	1,171.50
Kansas	314,968	100.0	8.3	6.6	7.1	6.7	6.6	7.1	7.9	8.8	8.8	32.2	1,191.30	1,196.50
Kentucky	461,223	100.0	12.5	7.6	8.0	7.5	7.1	7.3	7.7	8.1	7.7	26.6	1,108.10	1,101.00
Louisiana	401,165	100.0	16.7	7.8	7.8	7.1	6.5	6.4	6.6	7.3	6.8	27.2	1,087.70	1,065.50
Maine	180,317	100.0	14.2	7.8	8.0	7.7	7.6	7.7	7.8	7.9	7.2	24.2	1,079.30	1,060.00
Maryland	555,790	100.0	12.5	6.0	6.4	6.2	6.1	6.3	6.8	7.4	7.6	34.8	1,191.30	1,196.00
Massachusetts	724,674	100.0	13.2	6.6	6.9	6.5	6.0	6.2	6.6	7.0	7.3	33.6	1,174.90	1,169.50
Michigan	1,194,623	100.0	6.1	5.8	6.6	5.7	5.2	5.8	7.4	8.7	9.4	39.4	1,257.60	1,287.50
Minnesota	584,560	100.0	9.1	6.9	7.5	6.8	6.2	6.4	7.2	8.2	8.5	33.1	1,182.30	1,197.50
Mississippi	318,734	100.0	12.3	8.0	8.8	8.6	8.2	8.1	7.9	7.5	6.9	23.8	1,086.10	1,051.50
Missouri	707,487	100.0	10.6	7.0	7.6	7.1	6.8	7.1	7.7	8.4	8.3	29.5	1,148.80	1,151.50
Montana	123,975	100.0	11.9	7.8	8.0	7.4	7.2	7.5	8.0	8.3	8.1	25.8	1,106.60	1,102.50
Nebraska	203,762	100.0	9.7	7.3	7.6	7.2	7.2	7.7	8.1	8.6	8.2	28.3	1,146.50	1,139.50
Nevada	269,889	100.0	11.6	6.5	7.2	6.8	6.6	6.6	6.9	7.4	7.7	32.8	1,166.80	1,170.00
New Hampshire	161,891	100.0	8.1	5.9	6.8	6.8	6.7	7.3	7.8	8.4	8.4	33.7	1,207.50	1,207.40
New Jersey	995,695	100.0	7.6	5.4	6.0	5.9	5.3	5.7	6.5	7.3	8.2	42.2	1,286.20	1,304.50
New Mexico	213,959	100.0	15.1	7.6	7.9	7.5	7.2	7.2	7.2	7.3	6.9	26.1	1,090.60	1,065.40
New York	2,100,332	100.0	9.4	6.2	6.6	6.1	5.9	6.3	7.1	7.9	8.2	36.3	1,224.60	1,232.50
North Carolina	1,082,726	100.0	8.3	6.5	7.8	8.1	8.1	8.3	8.4	8.4	7.9	28.2	1,154.70	1,134.50
North Dakota	76,872	100.0	12.2	8.6	8.7	7.9	7.5	7.7	7.8	8.1	7.7	23.8	1,084.70	1,064.50
Ohio	1,291,578	100.0	11.8	6.3	6.6	5.8	5.4	6.0	7.3	8.6	8.9	33.3	1,172.30	1,210.50
Oklahoma	419,458	100.0	11.7	7.3	7.6	7.4	7.3	7.7	8.0	8.5	7.8	26.7	1,122.60	1,112.50
Oregon	467,560	100.0	9.3	6.9	7.2	6.5	6.3	6.8	8.0	9.0	8.7	31.2	1,170.90	1,187.00
Pennsylvania	1,641,934	100.0	8.0	6.6	6.8	6.2	6.0	6.8	8.2	9.4	9.1	32.9	1,200.00	1,216.40
Rhode Island	133,026	100.0	10.4	6.7	7.1	6.8	6.9	7.4	8.0	8.3	7.9	30.7	1,169.40	1,160.50
South Carolina	556,444	100.0	8.9	6.6	7.8	7.9	7.8	7.9	8.1	8.1	7.8	29.2	1,156.70	1,138.50
South Dakota	101,648	100.0	12.4	8.1	8.6	8.2	8.0	7.8	8.0	8.1	7.2	23.6	1,083.00	1,060.40
Tennessee	730,711	100.0	9.6	7.0	8.0	7.8	7.7	7.8	8.0	8.1	7.6	28.5	1,146.60	1,127.50
Texas	1,995,282	100.0	14.4	7.1	7.4	6.9	6.5	6.4	6.6	7.2	7.0	30.3	1,134.40	1,118.00
Utah	203,464	100.0	11.8	7.2	7.5	6.4	5.6	5.7	6.2	7.7	7.9	34.0	1,174.20	1,194.50
Vermont	80,961	100.0	8.8	6.8	7.3	7.3	7.3	7.8	8.5	8.7	8.3	29.1	1,163.10	1,154.50
Virginia	799,184	100.0	11.3	6.5	7.3	7.2	7.0	7.1	7.3	7.7	7.4	31.2	1,164.50	1,150.50
Washington	698,822	100.0	9.1	6.3	6.8	6.2	5.7	6.1	7.0	8.1	8.6	36.0	1,210.50	1,236.00
West Virginia	225,811	100.0	9.7	6.8	7.2	6.7	6.8	7.5	8.4	9.5	8.9	28.5	1,148.20	1,165.50
Wisconsin	697,097	100.0	7.1	6.8	7.3	6.3	5.9	6.6	7.9	9.5	9.8	32.7	1,195.70	1,223.50
Wyoming	59,708	100.0	9.9	7.3	7.7	6.7	6.5	6.6	7.6	8.3	8.3	31.2	1,161.90	1,171.50

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J6—Percentage distribution of monthly benefit for retired workers, by state or other area and monthly benefit, December 2009—Continued

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)		
		Total	Less than 600.00	600.00–699.90	700.00–799.90	800.00–899.90	900.00–999.90	1,000.00–1,099.90	1,100.00–1,199.90	1,200.00–1,299.90	1,300.00–1,399.90	1,400.00 or more	Average	Median	
Outlying areas															
American Samoa	1,829	100.0	39.0	12.2	10.5	8.1	5.7	5.9	4.3	3.4	3.0	7.9	762.00	689.50	
Guam	7,442	100.0	40.8	12.1	9.3	7.4	5.9	4.7	4.0	3.1	2.6	10.1	773.30	671.30	
Northern Mariana Islands	1,097	100.0	56.6	10.3	7.0	5.1	3.8	3.2	2.2	1.6	1.8	8.3	648.90	549.00	
Puerto Rico	377,817	100.0	33.7	14.0	12.5	9.7	7.3	5.8	4.4	3.3	2.5	6.9	777.10	717.00	
U.S. Virgin Islands	12,845	100.0	16.1	10.0	10.1	9.6	9.0	7.8	7.0	6.0	5.5	18.8	1,012.20	944.50	
Foreign countries	320,228	100.0	54.0	9.1	7.5	5.9	4.6	3.8	3.1	2.6	2.2	7.1	628.10	559.00	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

CONTACT: Shirley Turpin (410) 965-0181 or supplement@ssa.gov.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J8—Percentage distribution of disabled workers, by state or other area and monthly benefit, December 2009

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)	
		Total	Less than 600.00	600.00–699.90	700.00–799.90	800.00–899.90	900.00–999.90	1,000.00–1,099.90	1,100.00–1,199.90	1,200.00–1,299.90	1,300.00–1,399.90	1,400.00 or more	Average	Median
All areas	7,788,013	100.0	13.2	8.6	10.8	10.1	9.0	7.9	6.8	5.8	4.9	22.9	1,064.30	980.00
Alabama	204,573	100.0	12.3	9.0	11.6	10.9	9.8	8.4	7.0	5.9	4.8	20.3	1,043.60	961.00
Alaska	11,572	100.0	14.8	9.2	11.4	9.9	8.3	7.6	6.7	5.2	4.4	22.5	1,051.30	952.50
Arizona	138,396	100.0	11.0	7.7	10.1	9.9	9.0	8.1	7.1	6.3	5.4	25.4	1,103.40	1,026.00
Arkansas	128,375	100.0	12.7	8.9	11.7	11.2	10.2	9.0	7.6	6.3	5.0	17.3	1,015.50	951.00
California	639,263	100.0	14.5	8.4	10.1	9.1	8.1	7.2	6.3	5.6	4.8	25.9	1,085.40	996.50
Colorado	87,987	100.0	12.7	8.8	10.7	9.9	9.1	8.0	6.9	5.9	5.1	22.8	1,066.50	984.00
Connecticut	74,153	100.0	12.0	8.1	10.3	9.5	8.4	7.8	6.7	6.0	5.1	26.0	1,102.30	1,021.00
Delaware	24,937	100.0	10.6	7.5	9.6	9.9	8.9	7.9	7.1	6.2	5.2	27.0	1,123.20	1,043.00
District of Columbia	11,948	100.0	16.9	11.0	13.2	11.9	9.5	8.2	6.8	4.9	3.9	13.6	947.90	869.50
Florida	458,526	100.0	11.8	8.5	10.9	10.4	9.3	8.3	7.1	6.0	5.1	22.6	1,070.90	989.50
Georgia	236,868	100.0	11.4	8.3	10.8	10.6	9.9	8.7	7.6	6.4	5.3	21.0	1,060.60	990.00
Hawaii	21,698	100.0	11.5	7.9	9.7	9.8	8.6	8.1	7.4	6.7	5.5	24.8	1,097.00	1,027.50
Idaho	36,525	100.0	14.4	9.2	11.3	10.2	8.8	7.5	6.5	5.9	4.9	21.3	1,037.60	955.00
Illinois	262,227	100.0	13.6	8.4	10.3	9.5	8.4	7.4	6.5	5.6	4.9	25.5	1,086.30	997.50
Indiana	175,035	100.0	13.2	8.5	10.8	9.9	8.9	8.0	6.7	5.9	5.0	23.1	1,067.30	985.00
Iowa	68,425	100.0	15.5	9.6	11.4	10.3	8.8	7.7	6.4	5.6	4.8	19.8	1,013.00	934.00
Kansas	65,631	100.0	13.7	9.1	11.4	10.4	9.2	7.8	7.1	5.9	5.1	20.3	1,035.10	957.50
Kentucky	190,170	100.0	14.6	9.1	11.2	9.9	8.9	7.7	6.6	5.6	4.7	21.8	1,041.20	957.00
Louisiana	135,077	100.0	15.2	8.9	11.1	10.0	8.6	7.4	6.1	5.2	4.5	22.9	1,047.50	953.50
Maine	53,959	100.0	14.8	10.0	12.4	11.6	9.9	8.6	6.7	5.6	4.5	15.9	984.10	911.50
Maryland	108,605	100.0	12.2	7.9	10.2	9.7	8.6	7.9	7.0	6.0	5.3	25.2	1,095.10	1,016.50
Massachusetts	179,409	100.0	12.9	9.1	11.3	10.4	9.4	8.1	6.9	5.7	4.7	21.4	1,050.60	964.50
Michigan	293,299	100.0	13.6	8.2	9.9	8.8	7.7	6.8	5.9	5.3	4.7	29.2	1,121.90	1,025.50
Minnesota	109,472	100.0	13.9	8.9	11.0	10.1	8.8	7.8	6.6	5.6	4.7	22.5	1,052.50	966.00
Mississippi	121,217	100.0	12.6	9.2	11.9	11.8	10.3	8.7	7.2	5.9	4.8	17.5	1,013.30	941.00
Missouri	190,813	100.0	13.7	9.1	11.4	10.6	9.2	8.1	6.8	5.7	4.8	20.5	1,036.40	954.50
Montana	24,865	100.0	14.8	9.6	11.5	10.4	9.2	8.0	6.7	5.7	4.6	19.7	1,018.00	939.50
Nebraska	38,133	100.0	14.3	9.5	12.0	10.6	9.4	8.1	7.0	6.1	5.0	18.1	1,008.80	935.50
Nevada	52,776	100.0	9.5	7.2	9.9	9.9	9.3	8.3	7.6	6.4	5.5	26.4	1,125.70	1,048.50
New Hampshire	39,678	100.0	10.4	7.9	10.7	10.8	9.9	8.7	7.8	6.3	5.3	22.3	1,079.50	1,004.00
New Jersey	176,927	100.0	10.9	7.2	9.2	8.7	8.0	7.4	6.5	5.8	5.2	31.1	1,167.30	1,080.00
New Mexico	55,815	100.0	14.6	9.2	11.4	10.4	9.2	8.1	6.8	5.9	4.7	19.7	1,022.90	946.00
New York	470,783	100.0	13.9	8.2	10.0	9.0	8.0	7.1	6.1	5.4	4.7	27.5	1,109.00	1,010.50
North Carolina	296,118	100.0	10.8	8.0	10.5	10.8	10.3	9.5	8.2	6.9	5.5	19.7	1,056.20	996.50
North Dakota	12,872	100.0	16.4	10.0	12.2	10.5	9.3	7.8	6.1	5.4	5.0	17.4	986.30	909.00
Ohio	291,040	100.0	16.2	9.5	11.1	9.6	8.2	7.2	6.1	5.3	4.5	22.3	1,034.10	941.00
Oklahoma	114,708	100.0	14.1	9.0	11.0	10.3	9.0	7.9	6.9	5.9	5.2	20.8	1,035.00	961.00
Oregon	91,803	100.0	13.3	8.9	10.7	9.9	8.6	7.6	6.6	5.6	4.9	23.8	1,067.80	983.50
Pennsylvania	352,884	100.0	13.5	8.3	10.5	9.7	8.8	7.7	6.7	5.9	5.0	23.9	1,070.20	989.50
Rhode Island	32,963	100.0	13.5	9.6	11.7	10.7	9.4	8.0	6.7	5.6	4.7	19.9	1,028.00	945.50
South Carolina	156,502	100.0	10.2	7.7	10.3	10.6	10.1	9.1	8.2	6.8	5.6	21.3	1,074.30	1,011.50
South Dakota	16,866	100.0	16.2	9.9	11.8	10.6	9.2	8.2	6.9	5.7	4.7	17.0	986.90	915.80
Tennessee	217,950	100.0	12.3	8.9	11.5	11.0	10.0	8.6	7.4	6.2	5.0	19.2	1,034.40	961.50
Texas	499,728	100.0	13.6	8.5	11.1	10.2	9.1	8.1	7.0	6.0	5.0	21.6	1,051.40	973.00
Utah	39,318	100.0	14.6	9.3	11.0	10.0	8.6	7.2	6.3	5.5	4.5	23.0	1,053.20	958.00
Vermont	19,567	100.0	14.6	9.6	12.1	10.7	10.0	8.8	7.2	5.7	4.5	16.9	996.40	929.00
Virginia	190,962	100.0	12.0	8.0	10.4	10.2	9.4	8.4	7.4	6.2	5.2	22.7	1,072.40	999.50
Washington	150,080	100.0	13.1	8.8	10.7	9.9	8.8	7.5	6.5	5.6	4.8	24.5	1,077.70	984.50
West Virginia	91,273	100.0	13.8	8.2	9.8	9.0	7.9	7.0	6.2	5.7	4.8	27.7	1,105.30	1,019.00
Wisconsin	137,596	100.0	14.3	8.7	10.7	9.8	8.6	7.6	6.6	5.7	4.9	23.1	1,057.00	974.50
Wyoming	11,312	100.0	14.6	9.6	11.3	10.2	8.3	6.9	6.1	5.1	4.5	23.5	1,056.20	950.00

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J8—Percentage distribution of disabled workers, by state or other area and monthly benefit, December 2009—Continued

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)	
		Total	Less than 600.00	600.00–699.90	700.00–799.90	800.00–899.90	900.00–999.90	1,000.00–1,099.90	1,100.00–1,199.90	1,200.00–1,299.90	1,300.00–1,399.90	1,400.00 or more	Average	Median
		Outlying areas												
American Samoa	1,138	100.0	24.1	13.8	14.6	11.2	7.6	7.6	6.9	4.5	3.3	6.3	831.00	773.00
Guam	1,418	100.0	20.8	9.4	14.3	11.0	8.0	7.5	6.1	5.8	3.9	13.2	913.70	846.00
Northern Mariana Islands	218	100.0	37.6	14.2	16.5	9.6	7.3	4.6	2.8	a	a	4.6	710.20	689.30
Puerto Rico	159,775	100.0	12.4	11.5	16.2	14.7	11.6	8.7	6.3	4.5	3.4	10.7	931.00	864.50
U.S. Virgin Islands	1,719	100.0	11.3	8.4	10.1	9.5	9.9	8.4	8.6	6.5	5.9	21.5	1,072.10	1,012.00
Foreign countries	13,066	100.0	21.8	7.8	9.8	9.3	8.4	7.2	6.4	a	a	18.8	967.00	916.50

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

a. Suppressed to avoid disclosing information about particular individuals.

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5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J9—Percentage distribution of nondisabled widow(er)s, by state or other area and monthly benefit, December 2009

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)	
		Total	Less than 600.00	600.00–699.90	700.00–799.90	800.00–899.90	900.00–999.90	1,000.00–1,099.90	1,100.00–1,199.90	1,200.00–1,299.90	1,300.00–1,399.90	1,400.00 or more	Average	Median
All areas	4,090,496	100.0	10.6	4.6	5.8	7.0	8.2	9.9	11.6	10.4	9.1	22.8	1,123.50	1,134.50
Alabama	79,114	100.0	12.8	5.8	7.3	8.5	9.5	10.1	10.8	9.4	7.9	17.9	1,057.40	1,062.50
Alaska	4,444	100.0	14.5	5.7	6.3	7.2	8.7	8.9	11.0	9.5	7.9	20.3	1,069.70	1,085.30
Arizona	69,787	100.0	8.6	3.6	4.8	6.2	7.8	9.9	12.4	11.6	10.0	25.1	1,162.60	1,174.00
Arkansas	45,768	100.0	12.6	6.5	8.1	9.2	9.9	10.5	10.8	9.2	7.3	15.8	1,037.10	1,036.50
California	352,603	100.0	11.8	4.8	5.5	6.6	7.5	9.1	10.6	9.8	8.7	25.8	1,142.40	1,147.50
Colorado	49,303	100.0	9.8	4.2	5.4	6.7	8.1	9.7	11.2	10.6	9.4	24.8	1,144.00	1,155.50
Connecticut	41,027	100.0	5.5	2.6	3.7	4.8	6.7	9.0	11.7	11.1	10.8	34.0	1,261.30	1,252.00
Delaware	11,261	100.0	4.6	2.6	4.3	6.1	7.7	10.0	12.9	12.2	11.8	27.8	1,215.70	1,214.50
District of Columbia	5,117	100.0	25.8	8.5	8.9	8.4	8.3	7.5	6.2	5.3	4.7	16.5	951.80	880.00
Florida	254,974	100.0	8.3	4.3	5.6	7.2	8.6	10.4	12.0	10.7	9.2	23.8	1,150.80	1,148.00
Georgia	104,091	100.0	12.1	5.8	7.0	8.3	9.1	9.7	10.3	9.1	8.3	20.2	1,080.20	1,079.50
Hawaii	14,307	100.0	12.4	5.0	6.4	7.9	9.3	9.4	11.2	9.4	8.0	21.0	1,094.10	1,095.50
Idaho	18,331	100.0	5.9	3.6	5.5	7.6	9.5	11.5	13.5	11.6	9.7	21.7	1,150.60	1,149.50
Illinois	162,768	100.0	7.4	3.3	4.4	5.6	7.2	9.6	12.4	11.4	10.3	28.2	1,196.80	1,198.50
Indiana	91,285	100.0	4.5	2.6	4.1	5.8	8.0	10.8	14.0	12.7	11.4	26.1	1,203.40	1,201.50
Iowa	49,359	100.0	4.9	3.7	5.6	7.5	9.3	11.7	13.4	11.9	9.7	22.3	1,160.40	1,154.50
Kansas	37,782	100.0	5.5	3.3	4.9	6.9	8.4	10.7	12.5	11.3	10.0	26.4	1,192.90	1,182.50
Kentucky	75,102	100.0	14.4	6.4	7.3	8.2	8.9	10.0	11.2	9.2	8.0	16.6	1,037.60	1,052.00
Louisiana	84,305	100.0	15.2	6.5	7.6	8.3	8.7	9.4	10.2	9.1	7.6	17.4	1,035.40	1,039.50
Maine	20,706	100.0	10.0	5.1	7.0	8.8	9.9	11.3	11.4	10.0	7.9	18.6	1,084.70	1,081.50
Maryland	62,114	100.0	10.0	4.2	5.3	6.5	7.5	9.6	11.4	10.3	9.2	25.9	1,156.60	1,161.50
Massachusetts	77,010	100.0	10.0	4.0	5.1	6.2	7.5	9.3	10.8	10.4	9.2	27.5	1,170.90	1,173.50
Michigan	150,366	100.0	4.6	2.3	3.6	5.4	7.5	10.8	14.2	12.6	11.3	27.8	1,218.10	1,211.50
Minnesota	64,983	100.0	7.3	4.3	5.5	7.0	8.2	10.3	12.0	11.3	10.0	23.9	1,155.50	1,162.50
Mississippi	44,557	100.0	16.8	7.2	8.2	8.8	9.2	9.5	9.7	8.1	6.9	15.5	1,004.10	997.00
Missouri	86,165	100.0	8.1	4.3	5.9	7.6	8.8	10.7	12.4	10.6	9.7	21.9	1,133.20	1,138.50
Montana	14,645	100.0	7.1	4.5	6.2	8.0	10.0	11.8	12.8	10.8	8.9	20.0	1,123.60	1,119.00
Nebraska	25,208	100.0	5.7	4.4	6.0	8.0	9.5	11.4	12.2	10.7	9.2	22.9	1,152.80	1,140.50
Nevada	23,928	100.0	8.4	3.9	5.1	6.1	7.6	10.0	11.9	11.0	9.7	26.2	1,168.10	1,174.50
New Hampshire	14,692	100.0	5.5	3.0	4.3	6.4	7.9	10.3	13.2	11.9	9.8	27.7	1,205.70	1,195.50
New Jersey	102,747	100.0	6.2	2.9	4.1	5.5	7.0	9.4	11.6	10.9	10.4	32.1	1,234.60	1,230.00
New Mexico	26,461	100.0	14.8	6.2	7.3	8.4	9.0	9.9	10.3	9.2	7.2	17.6	1,041.20	1,042.50
New York	227,779	100.0	7.7	3.8	5.1	6.7	8.0	10.2	12.0	10.7	9.6	26.3	1,179.10	1,171.50
North Carolina	111,055	100.0	11.4	5.5	6.9	8.6	9.4	10.4	10.9	9.3	8.2	19.5	1,079.70	1,079.50
North Dakota	12,867	100.0	8.9	6.8	7.8	9.8	10.6	10.7	10.9	8.8	7.9	17.9	1,074.30	1,058.40
Ohio	199,259	100.0	8.4	3.4	4.5	6.0	7.6	10.4	13.5	12.1	10.4	23.7	1,156.40	1,172.50
Oklahoma	56,241	100.0	9.9	5.1	6.7	8.0	9.5	10.6	11.6	10.5	9.0	19.2	1,095.70	1,102.40
Oregon	49,790	100.0	5.7	3.0	4.6	6.1	8.4	11.1	13.8	12.4	10.5	24.4	1,181.10	1,179.50
Pennsylvania	216,261	100.0	5.6	2.9	4.6	6.3	8.3	11.5	14.1	12.5	10.6	23.5	1,178.80	1,177.00
Rhode Island	12,279	100.0	6.9	4.0	5.0	6.7	9.0	11.7	12.5	10.5	9.2	24.6	1,168.90	1,152.50
South Carolina	61,047	100.0	12.1	5.6	7.2	8.5	9.3	10.0	10.6	9.2	8.0	19.5	1,074.00	1,074.50
South Dakota	13,396	100.0	9.4	6.8	8.3	9.2	10.7	11.0	11.1	9.6	7.8	16.3	1,063.70	1,053.50
Tennessee	92,404	100.0	11.3	5.3	7.1	8.2	9.4	10.3	11.3	9.8	8.2	19.2	1,080.70	1,084.50
Texas	292,943	100.0	12.9	5.8	6.7	7.7	8.3	9.2	10.4	9.4	8.2	21.5	1,090.00	1,093.50
Utah	20,524	100.0	8.3	3.4	4.1	5.1	6.6	8.8	12.1	11.8	11.0	28.7	1,195.20	1,213.50
Vermont	8,635	100.0	7.1	4.4	6.3	7.8	9.7	11.5	11.5	11.2	8.9	21.4	1,136.20	1,125.50
Virginia	93,932	100.0	11.0	5.3	6.5	7.9	9.0	10.1	10.8	9.5	8.2	21.6	1,102.60	1,102.00
Washington	73,870	100.0	6.3	3.1	4.2	5.7	7.4	9.7	12.7	12.2	10.9	27.6	1,202.90	1,206.50
West Virginia	43,503	100.0	8.9	4.8	7.0	8.2	9.0	11.6	13.2	11.1	9.0	17.1	1,086.30	1,103.50
Wisconsin	77,246	100.0	4.7	3.0	4.4	6.3	8.2	11.1	14.0	12.7	11.3	24.3	1,187.40	1,188.50
Wyoming	6,662	100.0	5.8	3.9	5.4	7.3	8.6	10.6	13.4	12.2	9.4	23.3	1,162.50	1,163.80

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J9—Percentage distribution of nondisabled widow(er)s, by state or other area and monthly benefit, December 2009—Continued

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)		
		Total	Less than 600.00	600.00–699.90	700.00–799.90	800.00–899.90	900.00–999.90	1,000.00–1,099.90	1,100.00–1,199.90	1,200.00–1,299.90	1,300.00–1,399.90	1,400.00 or more	Average	Median	
Outlying areas															
American Samoa	381	100.0	48.0	14.7	8.7	8.9	4.5	5.5	2.4	2.4	1.0	3.9	673.80	616.00	
Guam	1,047	100.0	36.2	13.3	13.2	10.1	6.3	5.1	4.2	2.9	2.0	6.8	769.40	705.60	
Northern Mariana Islands	188	100.0	a	a	a	a	a	a	a	a	a	a	539.60	492.50	
Puerto Rico	71,803	100.0	46.0	12.9	10.6	8.1	6.3	4.8	3.6	2.4	1.7	3.6	686.80	629.00	
U.S. Virgin Islands	1,154	100.0	22.0	13.3	10.4	12.0	9.8	7.8	6.9	4.6	4.0	9.2	883.60	843.50	
Foreign countries	81,920	100.0	a	a	a	a	a	a	a	a	a	a	698.90	657.00	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

a. Suppressed to avoid disclosing information about particular individuals.

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5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J10—Number of children, by state or other area and type of benefit, December 2009

State or area	Total	Children under age 18 of—				Disabled adult children of—				Students aged 18–19 of—			
		Subtotal	Retired workers	Disabled workers	Deceased workers	Subtotal	Retired workers	Disabled workers	Deceased workers	Subtotal	Retired workers	Disabled workers	Deceased workers
All areas	4,230,578	3,158,138	301,132	1,598,189	1,258,817	920,883	241,042	90,266	589,575	151,557	19,277	59,524	72,756
Alabama	101,906	77,430	5,884	43,522	28,024	20,110	4,033	2,719	13,358	4,366	442	1,977	1,947
Alaska	8,675	7,258	1,093	2,425	3,740	1,086	319	98	669	331	62	81	188
Arizona	74,691	60,006	5,915	28,125	25,966	11,929	3,442	1,327	7,160	2,756	388	961	1,407
Arkansas	62,187	48,427	3,281	28,500	16,646	11,396	2,450	1,759	7,187	2,364	247	1,159	958
California	361,834	275,723	37,532	120,910	117,281	77,099	24,510	6,462	46,127	9,012	1,666	2,857	4,489
Colorado	46,194	36,439	3,585	15,976	16,878	7,880	2,396	687	4,797	1,875	238	648	989
Connecticut	42,850	30,437	3,198	15,553	11,686	11,340	3,201	780	7,359	1,073	151	397	525
Delaware	12,439	9,566	725	4,912	3,929	2,347	581	219	1,547	526	53	214	259
District of Columbia	6,537	4,883	596	1,618	2,669	1,484	218	116	1,150	170	24	43	103
Florida	235,834	183,603	22,933	84,479	76,191	42,438	11,882	4,350	26,206	9,793	1,549	3,319	4,925
Georgia	134,253	103,662	9,434	48,045	46,183	24,539	5,404	2,469	16,666	6,052	724	2,234	3,094
Hawaii	14,379	11,398	2,355	4,444	4,599	2,804	956	169	1,679	177	48	53	76
Idaho	19,951	15,583	1,362	8,018	6,203	3,672	1,160	423	2,089	696	85	264	347
Illinois	159,382	114,205	11,743	54,176	48,286	38,999	10,167	3,174	25,658	6,178	864	2,254	3,060
Indiana	97,781	71,071	5,032	37,026	29,013	21,669	5,280	2,162	14,227	5,041	499	2,143	2,399
Iowa	37,683	25,476	1,857	12,922	10,697	10,790	3,074	869	6,847	1,417	156	572	689
Kansas	36,347	27,071	2,037	13,489	11,545	7,919	2,181	723	5,015	1,357	160	539	658
Kentucky	87,866	65,773	3,623	40,634	21,516	19,020	4,006	2,664	12,350	3,073	248	1,595	1,230
Louisiana	87,920	64,448	4,653	31,768	28,027	20,211	4,291	2,219	13,701	3,261	341	1,253	1,667
Maine	23,906	17,384	1,089	11,736	4,559	5,768	1,364	885	3,519	754	81	418	255
Maryland	63,966	49,499	4,687	20,456	24,356	12,991	3,149	928	8,914	1,476	206	385	885
Massachusetts	89,765	64,846	4,688	41,024	19,134	22,173	5,864	2,475	13,834	2,746	336	1,362	1,048
Michigan	161,387	115,523	10,107	62,716	42,700	40,294	10,494	3,905	25,895	5,570	668	2,297	2,605
Minnesota	57,791	40,497	2,691	22,074	15,732	14,941	4,600	1,232	9,109	2,353	288	969	1,096
Mississippi	69,679	52,691	4,276	28,072	20,343	13,848	2,798	1,861	9,189	3,140	292	1,353	1,495
Missouri	97,442	72,059	4,869	38,651	28,539	20,861	5,096	2,311	13,454	4,522	451	1,978	2,093
Montana	13,207	9,877	1,080	4,356	4,441	2,767	855	222	1,690	563	76	204	283
Nebraska	21,097	15,153	1,094	7,678	6,381	5,178	1,513	503	3,162	766	87	281	398
Nevada	27,147	22,895	2,851	9,795	10,249	3,408	936	319	2,153	844	125	274	445
New Hampshire	19,974	15,598	861	10,389	4,348	3,699	978	520	2,201	677	55	354	268
New Jersey	103,175	75,891	8,286	37,430	30,175	23,962	6,774	1,678	15,510	3,322	474	1,221	1,627
New Mexico	30,210	23,891	2,165	10,851	10,875	5,303	1,472	536	3,295	1,016	128	358	530
New York	257,389	183,958	20,878	104,024	59,056	67,215	18,357	5,600	43,258	6,216	963	2,571	2,682
North Carolina	139,704	105,221	8,076	55,773	41,372	29,141	6,511	3,599	19,031	5,342	555	2,272	2,515
North Dakota	7,677	5,008	363	2,351	2,294	2,354	674	138	1,542	315	39	119	157
Ohio	159,406	110,923	8,503	56,254	46,166	41,417	10,176	3,239	28,002	7,066	835	2,816	3,415
Oklahoma	59,897	45,718	3,591	22,413	19,714	11,368	2,668	1,248	7,452	2,811	279	1,085	1,447
Oregon	42,394	30,953	3,896	14,421	12,636	9,893	3,028	917	5,948	1,548	252	527	769
Pennsylvania	186,828	133,367	9,968	74,397	49,002	46,359	11,552	4,473	30,334	7,102	827	3,019	3,256
Rhode Island	15,216	10,982	864	6,836	3,282	3,904	971	465	2,468	330	53	155	122
South Carolina	77,430	58,273	4,798	30,011	23,464	15,791	3,534	1,725	10,532	3,366	354	1,427	1,585
South Dakota	10,009	6,956	525	3,100	3,331	2,585	723	173	1,689	468	46	163	259
Tennessee	108,442	82,233	6,112	42,832	33,289	21,874	4,931	2,522	14,421	4,335	418	1,799	2,118
Texas	303,145	239,687	21,403	112,016	106,268	51,964	13,851	5,315	32,798	11,494	1,432	4,112	5,950
Utah	28,801	23,178	2,015	9,666	11,497	4,816	1,792	420	2,604	807	116	247	444
Vermont	9,765	6,985	678	4,323	1,984	2,483	654	306	1,523	297	53	137	107
Virginia	100,069	75,463	6,470	38,965	30,028	20,967	5,087	2,312	13,568	3,639	457	1,443	1,739
Washington	70,475	52,042	5,436	25,819	20,787	15,597	4,707	1,551	9,339	2,836	421	1,065	1,350
West Virginia	40,815	28,614	1,836	17,693	9,085	10,733	2,144	1,440	7,149	1,468	149	751	568
Wisconsin	74,605	51,415	3,610	28,530	19,275	20,369	6,010	1,737	12,622	2,821	330	1,213	1,278
Wyoming	6,235	4,875	401	1,955	2,519	1,122	319	100	703	238	32	77	129

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J10—Number of children, by state or other area and type of benefit, December 2009—Continued

State or area	Total	Children under age 18 of—				Disabled adult children of—				Students aged 18–19 of—			
		Subtotal	Retired workers	Disabled workers	Deceased workers	Subtotal	Retired workers	Disabled workers	Deceased workers	Subtotal	Retired workers	Disabled workers	Deceased workers
Outlying areas													
American Samoa	1,928	1,789	335	641	813	113	26	10	77	26	a	a	a
Guam	2,446	2,210	475	551	1,184	172	50	14	108	64	20	8	36
Northern Mariana Islands	711	645	235	88	322	47	a	a	a	19	4	0	15
Puerto Rico	90,192	66,012	6,991	40,013	19,008	23,167	6,265	2,129	14,773	1,013	195	418	400
U.S. Virgin Islands	1,958	1,565	356	479	730	331	112	17	202	62	25	11	26
Foreign countries	27,586	21,803	7,735	3,268	10,800	5,176	a	a	a	607	a	a	a

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

a. Suppressed to avoid disclosing information about particular individuals.

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5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J11—Number and total monthly benefits for beneficiaries in foreign countries, December 2009

Region and country ^a	Number						Total monthly benefits (thousands of dollars)	
	All beneficiaries	Retired workers	Disabled workers	Widow(er)s ^b	Wives and husbands	Children	All beneficiaries	Retired workers
Total	529,311	320,228	13,066	85,255	83,176	27,586	309,625	201,141
Africa	2,693	1,603	181	225	183	501	2,179	1,478
Asia	89,520	50,618	2,079	11,129	18,875	6,819	51,491	33,417
China	959	674	36	50	94	105	729	549
Cyprus	521	317	25	94	55	30	380	247
Hong Kong	1,327	897	17	211	151	51	978	725
India	1,550	1,090	79	122	152	107	1,306	951
Israel	9,798	5,693	261	1,422	1,521	901	7,501	5,017
Japan	41,874	23,326	89	3,582	14,372	505	15,889	10,336
Lebanon	555	276	26	77	46	130	371	206
Philippines	23,044	12,060	1,073	4,885	1,581	3,445	16,586	9,826
South Korea	2,019	1,398	16	95	478	32	973	758
Taiwan	665	494	21	37	78	35	579	461
Thailand	3,069	2,327	183	135	89	335	3,126	2,462
Turkey	811	518	27	154	71	41	679	453
Yemen	1,250	440	63	124	61	562	745	364
Central America and Caribbean	26,314	18,664	1,315	2,286	1,426	2,623	21,103	15,848
Barbados	1,088	914	25	77	48	24	966	833
Belize	541	404	24	31	29	53	479	385
Costa Rica	4,681	3,336	243	447	286	369	4,333	3,272
Dominican Republic	7,322	4,781	450	538	409	1,144	5,142	3,628
El Salvador	1,396	1,006	79	122	72	117	1,018	752
Guatemala	1,512	1,040	80	175	81	136	1,171	834
Honduras	1,096	708	65	111	57	155	896	624
Jamaica	2,779	2,207	74	207	137	154	2,196	1,808
Nicaragua	930	658	54	67	42	109	690	517
Panama	1,826	1,227	132	172	96	199	1,581	1,120
Trinidad and Tobago	1,030	814	39	85	50	42	893	717
Europe	219,703	137,898	4,553	35,304	34,917	7,031	124,518	81,628
Austria	2,765	1,792	50	415	410	98	1,503	994
Belgium	1,959	1,194	23	299	365	78	1,117	715
Croatia	1,506	976	122	206	114	88	1,327	904
Czech Republic	749	517	40	94	40	58	703	512
Denmark	1,091	674	18	190	160	49	826	522
Finland	922	582	34	129	124	53	585	386
France	12,829	8,293	83	1,893	2,168	392	7,836	5,464
Germany	37,725	23,349	698	5,854	6,448	1,376	18,548	11,238
Greece	23,561	14,262	584	4,323	3,708	684	13,444	8,740
Hungary	1,997	1,489	86	229	108	85	1,905	1,483
Ireland	9,376	6,268	181	1,198	1,301	428	5,950	4,258
Italy	32,721	19,471	492	6,828	5,034	896	18,412	11,749
Malta	620	345	30	134	72	39	501	296
Netherlands	5,087	3,201	65	692	959	170	2,399	1,537
Norway	6,940	4,148	93	1,211	1,333	155	2,957	1,794
Poland	8,152	5,153	323	1,337	1,078	261	4,811	3,028
Portugal	12,451	8,725	583	1,585	1,245	313	7,779	5,690
Romania	675	529	39	41	39	27	483	380
Serbia and Montenegro	1,014	663	74	158	71	48	791	527
Spain	10,838	6,433	231	2,075	1,754	345	6,823	4,358
Sweden	4,594	3,057	74	470	818	175	2,007	1,329
Switzerland	7,438	4,969	66	840	1,401	162	3,359	2,305
United Kingdom	32,359	20,390	467	4,720	5,861	921	18,664	12,242

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J11—Number and total monthly benefits for beneficiaries in foreign countries, December 2009—Continued

Region and country ^a	Number						Total monthly benefits (thousands of dollars)	
	All beneficiaries	Retired workers	Disabled workers	Widow(er)s ^b	Wives and husbands	Children	All beneficiaries	Retired workers
North America	157,129	88,422	3,610	32,449	24,344	8,304	83,378	49,343
Canada	107,074	63,873	2,307	18,964	19,273	2,657	53,401	33,564
Mexico	49,802	24,371	1,303	13,443	5,049	5,636	29,751	15,612
Oceania	10,657	7,144	328	1,201	1,476	508	7,602	5,441
Australia	9,047	6,050	270	1,067	1,349	311	6,198	4,389
New Zealand	1,328	952	40	99	108	129	1,197	928
South America	18,409	12,971	667	2,262	1,466	1,043	14,415	10,583
Argentina	3,750	2,478	77	611	465	119	2,868	2,024
Brazil	2,132	1,333	59	383	192	165	1,789	1,170
Chile and Easter Island	1,788	1,241	54	269	149	75	1,474	1,065
Colombia	4,516	3,430	217	379	237	253	3,501	2,721
Ecuador	2,901	2,148	113	245	183	212	2,130	1,637
Peru	1,351	926	82	156	87	100	1,107	785
Uruguay	888	692	31	79	69	17	687	556
U.S. Overseas Military Base	4,886	2,908	333	399	489	757	4,933	3,399

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

- a. Countries with 500 or more beneficiaries are shown separately. The total and continent subtotals include all foreign residents.
- b. Includes nondisabled and disabled widow(er)s, widowed mothers and fathers, and parents.

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5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J14—Number, average monthly benefit, and median monthly benefit, by state or other area and type of disabled beneficiary, December 2009

State or area	All disabled beneficiaries			Disabled workers			Disabled adult children			Disabled widow(er)s		
	Number	Average monthly benefit (dollars)	Median monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Median monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Median monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Median monthly benefit (dollars)
All areas	8,945,376	1,014.30	934.00	7,788,013	1,064.30	980.00	920,883	676.30	665.00	236,480	682.70	643.00
Alabama	232,674	994.20	918.00	204,573	1,043.60	961.00	20,110	629.80	606.00	7,991	649.40	618.00
Alaska	12,930	1,011.20	918.00	11,572	1,051.40	952.50	1,086	650.00	616.50	272	744.20	707.50
Arizona	153,768	1,062.60	986.50	138,396	1,103.40	1,026.00	11,929	689.60	685.00	3,443	711.40	670.00
Arkansas	144,383	970.20	910.40	128,375	1,015.40	951.00	11,396	605.60	586.00	4,612	612.80	582.50
California	732,153	1,037.00	948.50	639,263	1,085.40	996.50	77,099	697.40	690.00	15,791	737.00	693.00
Colorado	97,779	1,028.00	949.00	87,987	1,066.40	984.00	7,880	677.80	676.00	1,912	701.60	658.50
Connecticut	87,106	1,046.60	967.00	74,153	1,102.20	1,021.00	11,340	735.60	756.75	1,613	674.80	623.00
Delaware	27,900	1,080.20	1,000.00	24,937	1,123.20	1,043.00	2,347	724.00	731.00	616	700.60	666.50
District of Columbia	13,660	905.20	835.00	11,948	947.80	869.50	1,484	600.60	568.50	228	647.60	599.00
Florida	513,741	1,027.80	949.50	458,526	1,071.00	989.50	42,438	673.60	660.00	12,777	659.00	618.00
Georgia	269,785	1,009.40	942.50	236,868	1,060.60	990.00	24,539	646.40	619.00	8,378	625.60	587.00
Hawaii	25,067	1,044.00	973.00	21,698	1,097.00	1,027.50	2,804	694.00	692.00	565	742.80	710.00
Idaho	41,109	996.80	916.00	36,525	1,037.60	955.00	3,672	660.20	659.00	912	717.80	687.50
Illinois	308,983	1,031.00	946.00	262,227	1,086.40	997.50	38,999	722.60	730.50	7,757	709.60	670.00
Indiana	202,208	1,019.80	941.00	175,035	1,067.40	985.00	21,669	715.80	724.00	5,504	704.80	667.00
Iowa	81,019	960.20	887.00	68,425	1,013.00	934.00	10,790	675.20	679.00	1,804	662.60	638.50
Kansas	75,363	988.80	915.50	65,631	1,035.20	957.50	7,919	679.80	674.00	1,813	658.80	622.50
Kentucky	216,971	992.40	911.00	190,170	1,041.20	957.00	19,020	620.00	592.00	7,781	708.20	666.00
Louisiana	161,569	983.20	894.40	135,077	1,047.60	953.50	20,211	630.40	600.00	6,281	735.60	701.00
Maine	61,079	942.20	877.00	53,959	984.00	911.50	5,768	622.20	612.00	1,352	633.40	582.00
Maryland	124,177	1,047.40	969.00	108,605	1,095.00	1,016.50	12,991	714.80	710.00	2,581	717.60	679.00
Massachusetts	205,265	1,004.00	925.00	179,409	1,050.60	964.50	22,173	680.60	672.00	3,683	680.00	635.00
Michigan	342,481	1,069.00	972.50	293,299	1,122.00	1,025.50	40,294	749.80	770.00	8,888	769.20	735.00
Minnesota	126,310	1,002.60	922.00	109,472	1,052.60	966.00	14,941	678.20	675.50	1,897	677.00	635.00
Mississippi	140,220	956.80	892.50	121,217	1,013.40	941.00	13,848	583.40	546.00	5,155	628.20	594.00
Missouri	217,943	988.80	912.50	190,813	1,036.40	954.50	20,861	655.80	646.00	6,269	645.80	604.00
Montana	28,265	976.20	901.50	24,865	1,018.00	939.50	2,767	666.20	656.00	633	687.60	649.00
Nebraska	44,221	961.00	893.00	38,133	1,008.80	935.50	5,178	665.80	660.00	910	640.00	601.50
Nevada	57,513	1,093.00	1,018.00	52,776	1,125.60	1,048.50	3,408	729.00	721.75	1,329	729.00	678.00
New Hampshire	44,159	1,038.60	967.50	39,678	1,079.60	1,004.00	3,699	683.60	684.50	782	644.40	605.00
New Jersey	205,206	1,108.40	1,018.50	176,927	1,167.20	1,080.00	23,962	746.60	757.00	4,317	704.80	660.00
New Mexico	62,537	981.20	907.50	55,815	1,022.80	946.00	5,303	618.00	593.00	1,419	698.60	665.50
New York	550,468	1,052.60	954.00	470,783	1,109.00	1,010.50	67,215	723.00	731.00	12,470	697.40	657.00
North Carolina	334,909	1,005.60	950.00	296,118	1,056.20	996.50	29,141	634.40	612.00	9,650	574.40	532.00
North Dakota	15,510	927.20	855.00	12,872	986.40	909.00	2,354	640.40	628.75	284	629.60	599.75
Ohio	342,521	985.60	899.00	291,040	1,034.00	941.00	41,417	709.40	718.00	10,064	722.60	689.00
Oklahoma	130,256	990.00	918.45	114,708	1,035.00	961.00	11,368	656.40	638.00	4,180	662.60	626.00
Oregon	104,092	1,025.20	943.50	91,803	1,067.80	983.50	9,893	699.20	704.00	2,396	738.00	716.00
Pennsylvania	409,808	1,020.00	941.00	352,884	1,070.20	989.50	46,359	706.80	714.00	10,565	713.80	681.00
Rhode Island	37,621	982.40	907.00	32,963	1,028.00	945.50	3,904	659.80	657.00	754	655.60	616.00
South Carolina	178,077	1,020.60	962.50	156,502	1,074.40	1,011.50	15,791	646.60	625.00	5,784	589.40	558.00
South Dakota	19,849	930.00	863.00	16,866	987.00	915.75	2,585	609.00	600.00	398	601.80	576.00
Tennessee	248,444	985.80	918.50	217,950	1,034.40	961.50	21,874	644.60	620.00	8,620	624.60	590.00
Texas	568,956	1,004.20	929.00	499,728	1,051.40	973.00	51,964	652.40	628.00	17,264	696.40	660.00
Utah	45,036	1,008.60	918.00	39,318	1,053.20	958.00	4,816	695.40	700.00	902	738.20	702.00
Vermont	22,527	949.80	887.00	19,567	996.40	929.00	2,483	646.20	644.00	477	614.20	591.50
Virginia	218,064	1,021.20	950.50	190,962	1,072.40	999.50	20,967	656.80	638.40	6,135	672.40	641.00
Washington	169,321	1,037.60	948.50	150,080	1,077.60	984.50	15,597	718.20	727.00	3,644	751.00	722.00
West Virginia	106,108	1,046.60	954.45	91,273	1,105.40	1,019.00	10,733	651.20	638.00	4,102	777.00	755.50
Wisconsin	160,972	1,004.40	925.50	137,596	1,057.00	974.50	20,369	695.80	707.00	3,007	681.60	647.00
Wyoming	12,701	1,016.20	913.50	11,312	1,056.20	950.00	1,122	690.40	686.00	267	691.80	664.50

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J14—Number, average monthly benefit, and median monthly benefit, by state or other area and type of disabled beneficiary, December 2009—Continued

State or area	All disabled beneficiaries			Disabled workers			Disabled adult children			Disabled widow(er)s		
	Number	Average monthly benefit (dollars)	Median monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Median monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Median monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Median monthly benefit (dollars)
Outlying areas												
American Samoa	1,303	792.40	747.50	1,138	831.00	773.00	113	506.60	463.00	52	570.20	557.00
Guam	1,643	865.20	803.60	1,418	913.80	846.00	172	532.20	491.00	53	649.80	603.50
Northern Mariana Islands	275	642.60	625.00	218	710.20	689.25	47	363.80	302.00	10	480.20	413.50
Puerto Rico	188,298	863.60	817.00	159,775	931.00	864.50	23,167	461.00	421.00	5,356	590.60	565.50
U.S. Virgin Islands	2,112	988.20	918.95	1,719	1,072.20	1,012.00	331	594.60	578.50	62	762.60	744.25
Foreign countries	18,961	832.40	773.00	13,066	967.00	916.50	5,176	512.60	481.00	719	691.40	670.00

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

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5.K OASDI Current-Pay Benefits: Direct Deposit

Table 5.K1—Number and percentage of beneficiaries and average monthly benefit, by state or other area and direct deposit status, December 2009

State or area	All beneficiaries		Beneficiaries using direct deposit			Beneficiaries not using direct deposit		
	Number	Average monthly benefit (dollars)	Number	Percentage of all beneficiaries	Average monthly benefit (dollars)	Number	Percentage of all beneficiaries	Average monthly benefit (dollars)
All areas	52,522,819	1,064.40	45,622,184	86.9	1,095.90	6,900,635	13.1	856.00
Alabama	983,341	1,011.90	796,989	81.0	1,057.80	186,352	19.0	815.60
Alaska	74,678	1,010.70	65,986	88.4	1,037.70	8,692	11.6	806.00
Arizona	1,028,442	1,099.20	951,411	92.5	1,121.80	77,031	7.5	820.10
Arkansas	620,040	985.60	516,743	83.3	1,025.10	103,297	16.7	787.90
California	4,835,164	1,066.60	4,330,773	89.6	1,090.20	504,391	10.4	863.90
Colorado	663,894	1,068.90	596,373	89.8	1,092.10	67,521	10.2	863.50
Connecticut	611,276	1,182.80	524,885	85.9	1,211.50	86,391	14.1	1,008.80
Delaware	167,530	1,145.60	151,762	90.6	1,169.80	15,768	9.4	912.70
District of Columbia	73,093	957.70	61,391	84.0	993.00	11,702	16.0	772.70
Florida	3,669,375	1,078.70	3,380,580	92.1	1,099.90	288,795	7.9	831.60
Georgia	1,412,978	1,044.20	1,183,237	83.7	1,084.50	229,741	16.3	836.50
Hawaii	220,491	1,080.00	200,411	90.9	1,101.60	20,080	9.1	864.50
Idaho	258,691	1,045.20	234,435	90.6	1,066.30	24,256	9.4	841.50
Illinois	1,993,199	1,106.70	1,756,371	88.1	1,131.70	236,828	11.9	921.30
Indiana	1,157,821	1,113.20	1,007,471	87.0	1,141.00	150,350	13.0	926.60
Iowa	574,315	1,073.50	522,194	90.9	1,094.10	52,121	9.1	866.90
Kansas	478,138	1,093.60	424,485	88.8	1,119.50	53,653	11.2	888.70
Kentucky	870,206	989.60	668,162	76.8	1,043.60	202,044	23.2	811.00
Louisiana	770,217	968.30	617,947	80.2	1,015.50	152,270	19.8	776.60
Maine	293,011	988.30	250,490	85.5	1,018.00	42,521	14.5	813.70
Maryland	826,497	1,106.60	718,722	87.0	1,133.50	107,775	13.0	927.20
Massachusetts	1,117,870	1,080.50	955,183	85.4	1,109.40	162,687	14.6	910.90
Michigan	1,905,342	1,141.80	1,677,945	88.1	1,170.30	227,397	11.9	931.30
Minnesota	857,805	1,094.50	771,615	90.0	1,119.40	86,190	10.0	872.00
Mississippi	583,515	966.80	465,590	79.8	1,016.20	117,925	20.2	771.80
Missouri	1,137,581	1,048.20	977,840	86.0	1,079.60	159,741	14.0	855.70
Montana	187,197	1,026.10	166,003	88.7	1,050.80	21,194	11.3	832.90
Nebraska	303,880	1,059.00	272,813	89.8	1,082.00	31,067	10.2	856.80
Nevada	390,553	1,096.30	349,503	89.5	1,117.20	41,050	10.5	919.00
New Hampshire	245,563	1,110.10	216,061	88.0	1,137.00	29,502	12.0	913.30
New Jersey	1,440,943	1,193.10	1,253,871	87.0	1,218.60	187,072	13.0	1,022.30
New Mexico	347,976	990.80	305,127	87.7	1,027.40	42,849	12.3	730.20
New York	3,214,780	1,120.70	2,764,612	86.0	1,151.80	450,168	14.0	930.00
North Carolina	1,698,677	1,058.60	1,438,689	84.7	1,099.50	259,988	15.3	832.50
North Dakota	118,493	1,001.20	104,521	88.2	1,024.70	13,972	11.8	825.80
Ohio	2,074,384	1,067.90	1,754,758	84.6	1,098.10	319,626	15.4	901.90
Oklahoma	688,545	1,023.30	595,483	86.5	1,057.20	93,062	13.5	805.80
Oregon	686,777	1,092.40	634,653	92.4	1,109.50	52,124	7.6	883.30
Pennsylvania	2,530,211	1,102.10	2,200,975	87.0	1,126.90	329,236	13.0	936.60
Rhode Island	200,202	1,078.20	171,985	85.9	1,109.30	28,217	14.1	888.70
South Carolina	889,876	1,058.80	751,904	84.5	1,101.10	137,972	15.5	828.20
South Dakota	150,432	1,003.20	135,501	90.1	1,025.50	14,931	9.9	800.30
Tennessee	1,212,968	1,036.50	1,015,034	83.7	1,077.50	197,934	16.3	826.20
Texas	3,320,462	1,024.10	2,864,960	86.3	1,062.00	455,502	13.7	785.70
Utah	312,029	1,071.00	286,357	91.8	1,090.30	25,672	8.2	856.30
Vermont	124,585	1,058.00	108,032	86.7	1,087.40	16,553	13.3	866.70
Virginia	1,246,366	1,069.20	1,046,025	83.9	1,106.40	200,341	16.1	875.50
Washington	1,049,039	1,118.00	970,963	92.6	1,137.20	78,076	7.4	879.40
West Virginia	436,445	1,027.90	325,016	74.5	1,076.40	111,429	25.5	886.20
Wisconsin	1,033,096	1,104.30	935,841	90.6	1,125.20	97,255	9.4	903.90
Wyoming	88,514	1,079.40	78,553	88.7	1,104.80	9,961	11.3	878.90
Outlying areas								
Puerto Rico	776,374	713.80	568,631	73.2	776.40	207,743	26.8	542.30
Other ^a	569,942	598.70	497,322	87.3	602.70	72,620	12.7	571.90

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

a. Includes American Samoa, Guam, Northern Mariana Islands, U.S. Virgin Islands, and foreign countries.

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5.L OASDI Current-Pay Benefits: With Representative Payee

Table 5.L1—Number of beneficiaries with a representative payee as a percentage of all beneficiaries, by type of beneficiary and age, December 2009

Type of beneficiary and age	All beneficiaries	Beneficiaries with representative payee	
		Number	Percentage of all beneficiaries
Total	52,522,819	5,368,268	10.2
Adults	48,292,241	1,512,239	3.1
Retired workers	33,514,013	458,803	1.4
Under 65	3,133,930	6,377	0.2
65–74	16,595,869	150,818	0.9
75–84	9,906,325	146,209	1.5
85 or older	3,877,889	155,399	4.0
Disabled workers	7,788,013	891,187	11.4
Under 35	485,241	155,513	32.0
35–44	986,394	176,268	17.9
45–54	2,327,585	277,747	11.9
55–FRA	3,988,793	281,659	7.1
Wives and husbands	2,501,723	22,674	0.9
Under 65	366,686	2,842	0.8
65–74	1,208,724	9,381	0.8
75–84	770,777	7,364	1.0
85 or older	155,536	3,087	2.0
Widow(ers) ^a	4,252,012	124,594	2.9
Under 65	601,225	2,534	0.4
65–74	1,163,687	18,938	1.6
75–84	1,415,578	40,793	2.9
85 or older	1,071,522	62,329	5.8
Disabled widow(ers)	236,480	14,981	6.3
Under 55	31,908	2,189	6.9
55–FRA	204,572	12,792	6.3
Children	4,230,578	3,856,029	91.1
Under age 18	3,158,138	3,155,591	99.9
In custody of parent payee	2,828,046	2,828,046	100.0
Not in custody of parent payee	330,092	327,545	99.2
Disabled adult children	920,883	695,090	75.5
Under 35	268,934	187,743	69.8
35–44	210,567	151,240	71.8
45–54	234,385	183,139	78.1
55 or older	206,997	172,968	83.6
Students, aged 18–19	151,557	5,348	3.5

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: FRA = full retirement age.

a. Includes nondisabled widow(er)s, widowed mothers and fathers, and parents.

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5.M OASDI Current-Pay Benefits: International Agreements

Table 5.M1—Number of beneficiaries and average monthly benefit under U.S. totalization agreements, by country and type of benefit, December 1983–2009, selected years

Year and country	Total	Retired workers	Disabled workers	Wives and husbands	Widow(er)s ^a	Children
	<i>Number</i>					
1983	1,541	970	97	266	109	99
1984	2,717	1,664	254	435	202	162
1985	7,857	4,773	404	1,730	578	372
1990	27,662	17,432	1,609	5,801	2,078	742
1995	54,806	35,925	2,428	10,974	4,431	1,048
1996	59,455	39,085	2,514	11,917	4,893	1,046
1997	63,842	42,163	2,662	12,583	5,342	1,092
1998	68,748	45,632	2,708	13,376	5,926	1,106
1999	74,933	50,018	2,749	14,421	6,636	1,109
2000	82,404	55,398	2,687	15,806	7,302	1,211
2001	88,770	59,713	2,859	17,013	7,917	1,268
2002	94,350	63,418	2,992	18,032	8,585	1,323
2003	99,728	67,055	2,986	19,171	9,190	1,326
2004	106,096	71,782	2,826	20,308	9,835	1,345
2005	112,910	76,590	2,974	21,554	10,443	1,349
2006	127,978	85,862	2,956	26,495	11,273	1,392
2007	146,199	96,970	2,752	32,484	12,525	1,468
2008	155,242	102,806	2,639	34,925	13,396	1,476
2009	163,866	108,591	2,538	37,106	14,171	1,460
Australia	1,930	1,462	90	323	41	14
Austria	1,411	1,038	46	226	71	30
Belgium	848	580	5	177	73	13
Canada	50,130	32,183	1,158	10,132	6,226	431
Chile	112	87	^b	18	^b	0
Czech Republic	4	^b	^b	^b	^b	^b
Denmark	134	93	0	38	3	0
Finland	315	215	16	61	18	5
France	5,048	3,572	23	969	417	67
Germany	21,047	15,533	497	3,451	1,338	228
Greece	3,809	2,628	136	678	317	50
Ireland	2,279	1,598	13	491	145	32
Italy	9,536	6,032	85	1,904	1,397	118
Japan	29,712	17,139	12	11,160	1,288	113
Luxembourg	66	^b	^b	^b	4	^b
Netherlands	2,921	2,037	9	653	195	27
Norway	4,195	2,746	60	889	468	32
Poland	142	112	0	^b	^b	0
Portugal	2,114	1,377	112	311	278	36
South Korea	1,035	710	^b	308	^b	^b
Spain	2,894	1,835	65	592	346	56
Sweden	2,691	1,978	24	542	112	35
Switzerland	4,506	3,232	41	930	266	37
United Kingdom	16,987	12,358	138	3,215	1,145	131

(Continued)

5.M OASDI Current-Pay Benefits: International Agreements

Table 5.M1—Number of beneficiaries and average monthly benefit under U.S. totalization agreements, by country and type of benefit, December 1983–2009, selected years—Continued

Year and country	Total	Retired workers	Disabled workers	Wives and husbands	Widow(er)s ^a	Children
<i>Average monthly benefit (dollars)</i>						
1983	62.61	68.77	145.68	24.01	49.27	40.16
1984	79.29	90.32	144.07	25.64	51.61	42.90
1985	73.52	86.52	147.43	32.04	60.94	38.79
1990	108.07	122.87	223.71	44.37	88.01	63.88
1995	134.13	155.20	271.21	51.27	108.60	69.88
1996	138.89	160.65	287.11	52.80	112.45	74.22
1997	143.69	165.94	298.78	54.24	115.62	74.27
1998	146.37	169.15	305.43	55.08	117.87	73.49
1999	151.22	174.94	312.05	56.58	123.64	78.56
2000	157.03	182.39	324.60	59.01	127.96	79.70
2001	162.05	188.04	340.20	60.96	131.50	83.98
2002	165.18	191.74	345.58	62.45	134.02	86.28
2003	168.89	196.31	355.12	64.04	138.42	89.42
2004	173.70	202.10	367.43	66.37	142.91	96.73
2005	180.95	209.68	392.57	69.85	149.14	104.17
2006	188.44	220.28	411.64	78.79	155.37	106.01
2007	193.20	227.54	431.37	84.79	165.36	114.49
2008	204.94	241.97	456.78	91.10	177.16	121.37
2009	205.89	243.24	461.52	92.41	179.16	126.38
Australia	209.50	217.72	501.09	93.90	226.06	95.00
Austria	215.64	244.37	350.48	83.27	176.00	105.83
Belgium	203.52	239.52	644.20	82.80	190.05	147.15
Canada	182.53	213.11	413.53	78.22	155.21	125.68
Chile	202.10	218.82	^b	92.22	^b	0
Czech Republic	180.00	^b	^b	^b	^b	^b
Denmark	177.47	207.67	0	105.13	157.67	0
Finland	206.94	220.18	528.06	87.66	189.72	127.20
France	222.96	263.23	517.13	92.40	184.90	100.40
Germany	234.54	267.36	485.70	77.69	183.59	124.68
Greece	186.55	202.98	443.30	81.34	174.42	128.74
Ireland	215.22	251.78	683.88	88.90	219.85	116.19
Italy	192.49	229.66	607.48	80.99	164.22	126.92
Japan	207.44	263.19	531.00	116.09	259.68	142.58
Luxembourg	276.10	^b	^b	^b	249.50	^b
Netherlands	196.78	230.75	768.11	86.64	195.01	119.26
Norway	197.75	226.81	412.17	89.44	208.38	155.53
Poland	139.94	155.36	0	^b	^b	0
Portugal	214.71	222.73	546.60	83.83	197.27	140.81
South Korea	200.35	240.92	^b	104.76	^b	^b
Spain	184.71	211.53	516.26	79.27	169.78	127.91
Sweden	181.51	204.89	389.44	86.71	204.32	112.71
Switzerland	192.16	221.51	517.05	80.96	185.05	113.65
United Kingdom	255.45	301.27	573.89	89.82	201.64	133.40

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

- a. Includes nondisabled and disabled widow(er)s, mothers and fathers, and parents.
- b. Suppressed to avoid disclosing information about particular individuals.

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A vertical strip on the left side of the page shows a close-up of the stars and stripes of the American flag. The stars are white and five-pointed, set against a dark blue background. Below the stars, the horizontal stripes of the flag are visible, alternating between light and dark colors.

Old-Age, Survivors, and Disability Insurance

Benefits Awarded

Summary	6.1
Retired Workers	6.12
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Dependents and Survivors	6.25

Benefits Withheld **6.40**

Benefits Terminated **6.44**

6.A OASDI Benefits Awarded: Summary

Table 6.A1—Number, by type of benefit, 1940–2009

Year	All benefits	Retired workers	Disabled workers	Wives and husbands of—		Children of—			Widowed mothers and fathers	Widow(er)s	Parents
				Retired workers	Disabled workers	Retired workers	Deceased workers	Disabled workers			
Total	217,989,772	91,087,042	25,677,312	20,198,332	4,042,201	7,921,511	22,855,779	17,473,688	4,996,008	23,623,083	114,816
1940	254,984	132,335	...	34,555	...	8,249	51,133	...	23,260	4,600	852
1941	269,286	114,660	...	36,213	...	6,031	69,588	...	30,502	11,020	1,272
1942	258,116	99,622	...	33,250	...	4,859	72,525	...	31,820	14,774	1,266
1943	262,865	89,070	...	31,916	...	3,652	81,967	...	35,420	19,576	1,264
1944	318,949	110,097	...	40,349	...	4,350	95,326	...	42,649	24,759	1,419
1945	462,463	185,174	...	63,068	...	7,215	120,299	...	55,108	29,844	1,755
1946	547,150	258,980	...	88,515	...	10,736	104,139	...	44,190	38,823	1,767
1947	572,909	271,488	...	94,189	...	12,446	103,308	...	42,807	45,249	3,422
1948	596,201	275,903	...	98,554	...	12,604	106,351	...	44,276	55,667	2,846
1949	682,241	337,273	...	117,356	...	15,854	103,068	...	43,087	62,928	2,675
1950	962,628	567,131	...	162,768	...	25,495	97,146	...	41,101	66,735	2,252
1951	1,336,432	702,984	...	228,887	...	40,958	189,542	...	78,323	89,591	6,147
1952	1,053,303	531,206	...	177,707	...	24,695	158,650	...	64,875	92,302	3,868
1953	1,419,462	771,671	...	246,856	...	33,868	178,310	...	71,945	112,866	3,946
1954	1,401,733	749,911	...	236,764	...	35,938	176,858	...	70,775	128,026	3,461
1955	1,657,773	909,883	...	288,915	...	40,402	198,393	...	76,018	140,624	3,538
1956	1,855,296	934,033	...	384,562	...	37,900	173,883	...	67,475	253,524	3,919
1957	2,832,344	1,424,975	178,802	578,012	...	81,842	231,321	...	88,174	244,633	4,585
1958 ^a	2,123,465	1,041,668	131,382	366,553	12,920	63,408	205,110	18,264	81,467	199,320	3,373
1959 ^b	2,501,802	1,089,740	177,811	390,517	54,299	83,157	265,123	78,655	102,020	252,683	7,797
1960	2,336,144	981,717	207,805	339,987	54,187	69,979	241,430	104,310	92,607	239,267	4,855
1961	3,046,653	1,361,505	279,758	394,198	77,588	126,019	264,440	189,283	98,449	251,275	4,138
1962	3,004,501	1,347,268	250,634	393,857	69,212	135,984	266,286	170,354	99,925	267,051	3,930
1963	2,729,559	1,145,602	223,739	345,610	66,543	115,220	281,511	163,967	104,960	278,709	3,698
1964	2,552,063	1,041,807	207,592	316,262	59,706	100,051	288,304	145,439	106,249	283,263	3,390
1965	3,072,426	1,183,133	253,499	321,015	69,183	134,187	451,399	197,616	100,005	359,431	2,958
1966	4,722,483	1,647,524	278,345	396,856	81,238	195,055	584,901	276,093	107,135	403,595	3,202
1967	3,596,770	1,161,130	301,359	319,503	87,296	167,676	534,568	282,662	110,762	355,589	2,658
1968	3,619,927	1,240,098	323,154	329,935	89,603	172,460	593,331	299,016	113,765	375,391	2,144
1969	3,699,633	1,272,784	344,741	335,723	94,690	176,162	622,109	313,629	116,922	375,753	2,093
1970	3,722,433	1,338,107	350,384	339,447	96,304	182,595	591,724	316,546	112,377	363,216	1,852
1971	3,965,157	1,391,403	415,897	338,219	113,222	196,589	613,193	372,224	116,548	381,262	1,635
1972	4,202,607	1,461,399	455,438	353,742	124,366	209,422	643,513	411,766	117,699	402,809	2,086
1973	4,220,493	1,493,194	491,616	349,493	128,198	217,708	618,825	413,751	118,775	372,167	1,655
1974	4,100,809	1,413,145	535,977	319,149	132,042	201,684	574,174	443,909	109,221	363,693	1,155
1975	4,427,138	1,505,750	592,049	350,558	148,741	225,579	591,118	515,216	116,224	377,246	969
1976	4,351,654	1,475,773	551,460	346,623	147,407	236,805	578,905	511,487	113,520	385,373	914
1977	4,610,730	1,593,631	568,874	390,874	151,938	259,447	587,589	518,477	118,821	416,735	870
1978	4,166,571	1,472,786	464,415	346,956	130,161	214,284	566,992	453,382	110,015	403,679	844
1979	4,229,286	1,590,854	416,713	358,163	113,243	247,800	544,549	399,172	110,424	445,555	788
1980	4,214,567	1,612,669	396,559	360,693	108,500	248,658	540,246	385,208	107,809	452,156	724
1981	4,029,827	1,578,990	351,847	338,540	95,575	211,406	535,487	339,654	99,653	477,121	606
1982	3,840,579	1,618,411	297,131	349,967	77,835	182,849	473,396	260,470	86,786	492,451	498
1983	3,755,994	1,669,738	311,549	356,274	80,079	144,945	380,992	226,895	82,464	501,688	431
1984	3,690,103	1,607,370	361,998	342,691	81,834	131,986	351,326	238,252	73,794	499,677	383
1985	3,796,394	1,690,490	377,371	356,558	83,511	128,076	332,531	253,025	72,241	501,673	381
1986	3,853,454	1,734,248	416,865	358,115	82,435	122,652	319,808	258,167	69,340	491,052	344
1987	3,733,853	1,681,716	415,848	333,333	77,316	117,984	310,573	256,742	64,777	475,035	286
1988	3,680,969	1,654,068	409,490	316,929	73,790	116,659	324,346	265,026	62,676	457,574	263
1989	3,646,349	1,656,744	425,582	310,498	69,113	106,491	307,484	261,387	59,525	449,139	281
1990	3,716,924	1,664,754	467,977	308,980	69,667	108,105	303,616	283,586	58,060	451,862	233
1991	3,865,426	1,695,346	536,434	307,000	72,754	107,261	301,459	318,188	57,896	468,788	246
1992	4,050,849	1,707,949	636,637	304,764	78,083	108,686	304,300	381,585	56,402	472,078	298
1993	4,001,201	1,661,281	635,238	290,728	74,605	106,566	311,290	398,598	56,408	466,198	238
1994	3,940,342	1,625,347	631,870	275,025	69,549	102,983	310,051	411,205	54,732	459,340	213

(Continued)

6.A OASDI Benefits Awarded: Summary

Table 6.A1—Number, by type of benefit, 1940–2009—Continued

Year	All benefits	Retired workers	Disabled workers	Wives and husbands of—		Children of—			Widowed mothers and fathers	Widow(er)s	Parents
				Retired workers	Disabled workers	Retired workers	Deceased workers	Disabled workers			
1995	3,882,193	1,609,174	645,832	258,740	63,097	101,239	306,044	401,295	51,645	444,899	200
1996	3,793,238	1,581,452	624,335	244,014	57,528	98,655	302,480	397,350	49,150	438,081	177
1997	3,865,966	1,718,623	587,417	268,012	50,818	97,594	297,204	362,548	43,504	440,076	157
1998	3,800,259	1,631,511	608,131	263,668	47,550	96,893	294,851	371,426	42,395	443,669	152
1999	3,917,099	1,690,024	620,488	275,568	46,164	99,826	295,196	378,144	41,756	469,806	118
2000	4,290,080	1,960,649	621,650	341,503	43,941	115,358	297,686	363,632	40,491	505,021	135
2001	4,161,971	1,779,228	691,309	314,547	43,412	110,680	302,445	383,049	41,323	495,848	129
2002	4,335,714	1,812,551	750,003	317,685	45,600	116,186	310,395	419,780	40,829	522,537	139
2003	4,321,778	1,791,316	777,461	305,831	47,183	111,992	305,409	434,953	39,206	508,306	121
2004	4,458,816	1,883,060	795,775	319,430	48,016	115,391	309,472	433,699	40,030	513,839	104
2005	4,672,152	2,000,157	829,687	329,225	50,187	123,494	314,786	469,267	38,248	516,949	152
2006	4,621,110	1,999,019	798,675	328,430	49,521	126,860	321,155	449,020	35,981	512,320	129
2007	4,710,830	2,035,780	804,787	316,782	47,583	126,678	322,326	453,292	33,597	569,862	143
2008	5,134,644	2,278,997	877,226	344,003	50,756	140,581	329,397	490,895	32,717	589,940	132
2009	5,728,086	2,739,966	970,696	375,123	54,112	156,412	319,127	532,132	32,878	547,495	145

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Benefits not necessarily payable at time of award.

Beginning with 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

From 1966–2006, total includes special age-72 beneficiaries.

. . . = not applicable.

- a. January–November.
- b. Includes December 1958.

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Table 6.A2—Average primary insurance amount for retired workers and average monthly benefit for retired and disabled workers, and nondisabled widows, by type of benefit and sex, selected years 1940–2009 (in dollars)

Year ^a	Average primary insurance amount for retired workers (dollars)			Average monthly benefit (dollars)						
	All	Men	Women	Retired workers			Disabled workers			Non-disabled widows
				All	Men	Women	All	Men	Women	
1940	22.71	23.26	18.38	22.71	23.26	18.38	...	...	...	20.36
1945	25.11	25.71	19.99	25.11	25.71	19.99	...	...	...	20.17
1950 (Jan.–Aug.)	29.03	30.16	22.98	29.03	30.16	22.98	...	...	...	21.65
1950 (Sept.–Dec.)	33.24	35.32	26.85	33.24	35.32	26.85	...	...	...	36.89
1955	69.74	75.86	56.05	69.74	75.86	56.05	...	...	...	49.68
1960	83.87	92.03	69.23	81.73	92.03	63.26	91.16	94.02	78.91	62.12
1965 (Jan.–Aug.)	88.57	96.56	74.99	82.69	90.89	68.78	93.26	97.89	80.27	73.81
1965 (Sept.–Dec.)	99.36	108.79	82.34	89.20	99.90	71.26	101.30	106.51	86.75	75.37
1970	133.94	146.99	113.69	123.82	136.80	103.67	139.79	148.39	115.74	106.95
1975 (Jan.–May)	216.56	242.76	176.76	196.42	220.35	160.50	220.60	241.48	175.27	185.34
1975 (June–Dec.)	235.13	264.67	191.56	213.68	241.05	173.31	243.47	266.08	192.13	198.88
1980 (Jan.–May)	353.80	411.70	270.50	321.10	374.00	244.90	352.10	388.80	269.70	277.50
1980 (June–Dec.)	396.30	465.50	301.00	359.80	422.90	272.90	396.50	437.90	301.00	312.80
1981 (Jan.–May)	400.10	467.50	302.60	363.60	424.20	276.00	389.80	431.40	295.00	313.00
1981 (June–Dec.)	438.80	514.50	332.60	400.10	468.00	304.80	425.60	471.30	320.70	346.30
1982 (Jan.–May)	425.60	504.20	315.10	388.40	457.50	291.40	416.90	462.40	312.70	350.80
1982 (June–Dec.)	447.10	532.70	328.50	408.60	483.00	305.50	441.10	489.50	328.00	375.30
1983 (Jan.–Nov.)	448.00	531.60	330.00	408.20	480.30	306.50	432.40	480.30	317.90	385.10
1983 (Dec.)	451.20	546.40	325.50	410.20	491.80	302.50	445.30	496.80	333.20	400.50
1984 (Jan.–Nov.)	457.10	544.40	335.60	414.70	489.40	310.90	443.00	494.00	332.20	406.80
1984 (Dec.)	471.00	565.70	343.00	429.50	511.30	318.90	461.10	516.50	342.90	428.00
1985 (Jan.–Nov.)	475.70	566.20	348.00	432.00	509.60	322.20	459.20	514.00	345.00	431.10
1985 (Dec.)	487.60	588.30	352.00	443.10	530.00	326.10	477.60	535.90	357.20	436.90
1986 (Jan.–Nov.)	500.30	596.90	363.50	453.10	536.00	335.70	471.50	527.60	358.20	452.10
1986 (Dec.)	504.60	611.00	361.70	456.90	548.40	334.00	489.00	546.90	369.60	446.20
1987 (Jan.–Nov.)	516.80	618.90	374.10	466.10	553.60	343.90	487.00	546.80	368.90	462.00
1987 (Dec.)	536.90	648.80	386.80	484.00	580.00	355.20	517.10	583.40	391.80	477.40
1988 (Jan.–Nov.)	540.70	648.60	390.40	487.80	580.30	359.00	517.20	581.90	392.60	488.80
1988 (Dec.)	560.00	679.50	401.20	504.90	607.00	369.20	543.00	612.70	410.00	499.20
1989 (Jan.–Nov.)	572.80	686.90	412.90	516.60	614.80	379.00	539.90	608.00	414.40	512.90
1989 (Dec.)	597.50	724.90	425.90	538.70	647.50	392.10	571.20	645.90	437.50	525.70
1990 (Jan.–Nov.)	609.00	729.70	438.20	550.50	654.60	403.30	566.90	637.80	438.90	541.10
1990 (Dec.)	626.40	761.00	447.30	559.30	672.10	409.30	600.60	676.90	466.60	566.60
1991 (Jan.–Nov.)	642.80	768.90	460.40	583.50	692.30	426.10	593.00	666.90	464.20	573.70
1991 (Dec.)	656.20	793.40	467.40	592.80	709.50	432.10	613.20	689.70	481.50	582.10
1992 (Jan.–Nov.)	671.60	803.10	483.40	608.60	721.90	446.50	601.60	677.00	474.70	596.90
1992 (Dec.)	688.30	829.30	493.80	620.70	740.90	454.90	625.70	706.50	490.30	604.00
1993 (Jan.–Nov.)	697.10	831.50	507.10	630.60	746.20	467.00	621.70	699.80	494.70	620.70
1993 (Dec.)	716.20	861.70	519.00	645.90	769.80	477.90	649.90	735.70	512.30	618.90
1994 (Jan.–Nov.)	722.90	862.90	530.30	651.00	771.30	485.40	647.00	731.30	518.50	637.80
1994 (Dec.)	741.90	892.40	541.50	665.70	794.20	494.50	684.80	776.50	549.00	644.60
1995 (Jan.–Nov.)	744.30	887.00	551.40	671.70	794.30	505.80	675.70	767.30	546.00	662.50
1995 (Dec.)	765.30	917.60	563.60	668.40	818.00	516.70	703.40	798.70	568.70	675.40
1996 (Jan.–Nov.)	769.20	916.80	572.40	693.60	820.50	524.50	693.70	788.90	567.80	683.10
1996 (Dec.)	788.90	950.20	582.90	708.70	846.00	533.30	727.70	832.00	590.00	690.30
1997 (Jan.–Nov.)	787.10	951.70	608.50	723.30	854.30	581.30	718.30	820.40	590.70	700.60
1997 (Dec.)	812.80	982.00	610.40	734.50	876.90	564.40	748.40	851.60	615.10	699.90
1998 (Jan.–Nov.)	819.50	983.10	620.00	744.70	882.10	577.10	737.00	841.50	610.60	716.70
1998 (Dec.)	831.10	1,003.20	628.80	754.20	898.40	584.70	762.00	870.30	633.80	711.00
1999 (Jan.–Nov.)	857.60	1,023.20	649.50	777.10	918.40	599.60	763.90	870.60	636.60	713.30
1999 (Dec.)	875.70	1,043.90	663.70	791.20	934.30	610.70	792.60	904.30	660.60	708.20
2000 (Jan.–Nov.)	904.90	1,069.40	685.40	841.60	990.50	643.00	806.40	917.60	673.20	708.70
2000 (Dec.)	930.00	1,111.00	713.00	842.80	996.50	658.50	846.60	960.20	710.00	715.40

(Continued)

6.A OASDI Benefits Awarded: Summary

Table 6.A2—Average primary insurance amount for retired workers and average monthly benefit for retired and disabled workers, and nondisabled widows, by type of benefit and sex, selected years 1940–2009 (in dollars)—Continued

Year ^a	Average primary insurance amount for retired workers (dollars)			Average monthly benefit (dollars)						Non-disabled widows
				Retired workers			Disabled workers			
	All	Men	Women	All	Men	Women	All	Men	Women	
2001 (Jan.–Nov.)	953.90	1,134.50	730.80	855.70	1,008.40	667.20	847.00	961.70	711.00	735.80
2001 (Dec.)	982.10	1,168.90	749.90	881.10	1,039.10	684.70	868.40	982.70	734.90	717.10
2002 (Jan.–Nov.)	1,026.30	1,219.00	788.10	914.10	1,076.80	712.90	897.50	1,019.50	753.30	750.50
2002 (Dec.)	1,029.90	1,230.00	788.50	916.90	1,084.50	714.80	906.70	1,028.10	762.50	751.90
2003 (Jan.–Nov.)	1,067.10	1,272.60	824.90	939.70	1,109.40	739.60	935.80	1,061.50	786.90	779.00
2003 (Dec.)	1,083.60	1,297.70	830.40	963.80	1,142.30	752.70	946.80	1,075.80	794.60	780.00
2004 (Jan.–Nov.)	1,072.50	1,277.60	834.20	936.10	1,104.70	740.20	942.60	1,068.40	795.70	768.10
2004 (Dec.)	1,090.70	1,309.70	853.80	961.20	1,136.50	771.50	965.80	1,093.50	819.00	785.90
2005 (Jan.–Nov.)	1,106.10	1,314.10	869.30	960.40	1,130.30	767.00	961.00	1,086.80	815.90	780.50
2005 (Dec.)	1,135.70	1,367.90	899.00	1,011.00	1,189.20	829.40	997.20	1,128.50	846.10	809.40
2006 (Jan.–Nov.)	1,163.30	1,376.70	923.70	1,020.50	1,195.70	823.80	999.00	1,129.00	851.00	818.70
2006 (Dec.)	1,193.60	1,415.30	947.50	1,045.90	1,232.40	838.90	1,020.60	1,148.00	875.60	854.90
2007 (Jan.–Nov.)	1,212.90	1,428.00	972.40	1,069.80	1,249.90	868.30	1,030.50	1,161.90	880.60	861.40
2007 (Dec.)	1,223.60	1,445.40	976.50	1,081.00	1,269.60	870.80	1,045.70	1,174.70	898.20	873.80
2008 (Jan.–Nov.)	1,259.00	1,476.00	1,014.70	1,113.80	1,297.40	907.10	1,053.90	1,184.60	905.10	868.90
2008 (Dec.)	1,297.90	1,552.10	1,066.20	1,083.30	1,256.20	925.70	1,109.10	1,245.30	953.60	891.40
2009 (Jan.–Dec.)	1,339.70	1,563.60	1,087.20	1,181.60	1,365.60	974.10	1,119.90	1,255.00	963.10	916.30

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Beginning with 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

. . . = not applicable.

a. Some years are shown in several parts to reflect changes in benefit rates during the year.

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6.A OASDI Benefits Awarded: Summary

Table 6.A3—Number and average monthly benefit, by type of benefit, sex, age, basis of entitlement, and race, 2009

Age and basis of entitlement	All races ^a		White		Black		Other	
	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)
Retired workers^c								
Total	2,739,966	1,181.60	2,147,458	1,229.10	246,045	1,073.30	346,463	964.30
62–64	1,672,754	1,037.60	1,302,786	1,072.10	145,036	970.40	224,932	881.30
65–69	1,031,515	1,413.80	819,891	1,473.50	98,139	1,227.30	113,485	1,143.90
70 or older	35,697	1,218.40	24,781	1,395.10	2,870	1,003.90	8,046	750.80
<i>Men</i>								
Subtotal	1,452,329	1,365.60	1,156,324	1,434.00	122,979	1,151.60	173,026	1,060.90
62–64	855,135	1,210.30	670,823	1,265.80	74,586	1,035.40	109,726	989.90
65–69	586,609	1,594.60	479,374	1,667.00	47,506	1,337.40	59,729	1,217.90
70 or older	10,585	1,223.00	6,127	1,614.10	887	966.50	3,571	615.70
<i>Women</i>								
Subtotal	1,287,637	974.10	991,134	990.10	123,066	995.00	173,437	867.90
62–64	817,619	857.10	631,963	866.50	70,450	901.60	115,206	777.80
65–69	444,906	1,175.50	340,517	1,201.10	50,633	1,124.00	53,756	1,061.70
70 or older	25,112	1,216.50	18,654	1,323.20	1,983	1,020.70	4,475	858.60
Disabled workers								
Total	970,696	1,119.90	655,392	1,179.60	173,181	1,013.70	136,536	962.70
Under 30	79,439	689.80	48,108	706.30	15,323	662.80	15,761	663.50
30–39	107,963	941.90	71,093	972.30	20,624	866.90	15,980	904.00
40–49	222,023	1,061.00	149,236	1,113.40	42,748	957.50	29,635	946.30
50–54	191,302	1,157.60	129,068	1,221.10	36,377	1,049.00	25,555	991.90
55–59	220,879	1,253.40	152,159	1,314.80	38,001	1,157.70	30,267	1,065.70
60 or older	149,090	1,319.40	105,728	1,382.90	20,108	1,215.30	19,338	1,080.50
<i>Men</i>								
Subtotal	521,424	1,255.00	358,963	1,332.10	84,828	1,097.00	74,373	1,056.70
Under 30	44,242	702.40	26,800	722.00	7,929	661.10	9,377	679.20
30–39	53,781	1,002.00	35,587	1,037.70	9,359	908.80	8,689	956.80
40–49	111,874	1,176.30	75,862	1,242.50	20,182	1,031.40	15,588	1,042.00
50–54	99,731	1,306.70	69,107	1,385.30	17,412	1,143.10	13,026	1,109.20
55–59	123,124	1,421.60	87,305	1,498.90	19,263	1,262.10	16,329	1,197.20
60 or older	88,672	1,493.90	64,302	1,571.60	10,683	1,336.60	11,364	1,202.80
<i>Women</i>								
Subtotal	449,272	963.10	296,429	995.00	88,353	933.80	62,163	850.30
Under 30	35,197	674.00	21,308	686.60	7,394	664.50	6,384	640.40
30–39	54,182	882.30	35,506	906.70	11,265	832.10	7,291	841.10
40–49	110,149	944.00	73,374	980.00	22,566	891.40	14,047	840.00
50–54	91,571	995.30	59,961	1,031.70	18,965	962.70	12,529	870.00
55–59	97,755	1,041.50	64,854	1,066.90	18,738	1,050.40	13,938	911.60
60 or older	60,418	1,063.30	41,426	1,090.10	9,425	1,077.90	7,974	906.30
Wives								
Total	406,769	410.50	334,771	423.90	21,841	369.40	48,497	339.30
<i>Wives of retired workers</i>								
Subtotal	355,826	426.70	296,696	438.40	17,146	398.50	41,984	356.10
Entitlement based on care of children	12,531	496.90	8,867	538.50	1,280	437.60	2,384	374.00
Entitlement based on age	343,295	424.20	287,829	435.30	15,866	395.30	39,600	355.00
62–64	231,491	396.40	194,500	406.00	10,545	370.60	26,446	335.80
65–69	99,590	493.40	84,184	506.50	4,446	454.50	10,960	408.70
70 or older	12,214	386.20	9,145	402.10	875	392.10	2,194	317.40
<i>Wives of disabled workers</i>								
Subtotal	50,943	297.20	38,075	311.00	4,695	263.20	6,513	231.40
Entitlement based on care of children	16,963	213.70	10,984	229.90	2,248	195.30	3,624	174.40
Entitlement based on age	33,980	339.00	27,091	343.90	2,447	325.60	2,889	303.00

(Continued)

6.A OASDI Benefits Awarded: Summary

Table 6.A3—Number and average monthly benefit, by type of benefit, sex, age, basis of entitlement, and race, 2009—Continued

Age and basis of entitlement	All races ^a		White		Black		Other	
	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)
Husbands								
Total	22,449	313.20	14,596	324.70	2,351	325.70	5,420	277.80
Husbands of retired workers	19,297	327.80	12,616	1,498.90	1,854	349.20	4,827	288.20
Husbands of disabled workers	3,152	223.90	1,980	228.20	497	^d	593	193.40
Children								
Total	1,007,671	474.70	606,474	518.80	209,710	397.70	158,782	417.50
By age								
Under age 18	645,853	421.30	385,737	463.30	133,583	339.50	118,112	379.40
Disabled, aged 18 or older	79,769	487.90	45,302	505.40	13,205	444.00	7,627	457.30
Students aged 18–19	282,049	593.30	175,435	644.40	62,922	511.50	33,043	544.80
By basis of entitlement								
Children of retired workers	156,412	542.50	101,551	588.90	26,590	491.10	24,089	425.10
Children of deceased workers	319,127	745.70	188,367	818.10	68,043	617.70	57,165	669.40
Children of disabled workers	532,132	292.30	316,556	318.30	115,077	246.00	77,528	229.40
Widowed mothers and fathers								
Total	32,878	817.80	21,932	868.70	3,933	701.80	7,013	723.70
By age								
Under 30	3,436	667.70	2,245	690.40	364	^d	827	656.90
30–39	9,935	736.20	6,536	778.90	1,206	610.60	2,193	678.10
40–49	13,511	866.70	9,070	927.00	1,553	744.60	2,888	742.90
50–59	5,324	938.80	3,589	995.50	706	819.20	1,029	822.80
60 or older	672	848.60	492	^d	104	^d	76	^d
By basis of entitlement								
Widowed mothers	28,612	837.60	19,001	895.00	3,401	708.10	6,210	732.90
Widowed fathers	4,266	684.80	2,931	698.10	532	661.50	803	651.90
Nondisabled widow(er)s								
Total	515,977	916.30	408,206	934.70	46,571	780.00	61,200	897.40
By age								
60–64	176,289	1,065.60	123,944	1,098.60	20,743	909.70	31,602	1,038.60
65–69	110,197	911.30	84,931	925.80	11,579	725.00	13,687	979.30
70–74	63,626	732.70	52,836	765.30	5,340	615.30	5,450	531.50
75 or older	165,865	831.40	146,495	862.30	8,909	648.00	10,461	554.60
By basis of entitlement								
Widows	478,914	934.80	381,539	953.60	41,950	792.30	55,425	913.70
Widowers	37,063	677.00	26,667	664.60	4,621	667.90	5,775	741.20

(Continued)

Table 6.A3—Number and average monthly benefit, by type of benefit, sex, age, basis of entitlement, and race, 2009—Continued

Age and basis of entitlement	All races ^a		White		Black		Other	
	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)	Number	Average monthly benefit ^b (dollars)
Disabled widow(er)s								
Total	31,518	666.30	20,765	693.30	5,778	595.50	4,922	636.50
By age								
50–54	15,531	661.20	10,048	688.40	3,032	587.60	2,416	641.50
55–59	15,762	669.70	10,554	695.90	2,716	604.20	2,476	630.70
60 or older	225	^d	163	^d	30	^d	30	^d
By basis of entitlement								
Widows	29,174	680.10	19,312	708.40	5,217	603.80	4,596	648.60
Widowers	2,344	494.20	1,453	491.70	561	518.70	326	^d

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

Effective 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

Previous editions of this table were based on a 1-percent sample of the Master Beneficiary Record.

- a. Includes persons of unknown race.
- b. Benefits awarded before the December cost-of-living increase are converted to the December rates before averages are computed.
- c. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.
- d. Average benefits are not shown for fewer than 500 beneficiaries.

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6.A OASDI Benefits Awarded: Summary

Table 6.A4—Number and average monthly benefit for retired and disabled workers, by age and sex, 2009

Age	Total		Men		Women	
	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)
Retired workers						
Total ^b	2,739,966	1,181.60	1,452,329	1,365.60	1,287,637	974.10
62–64	1,672,754	1,037.60	855,135	1,210.30	817,619	857.10
62	1,284,624	1,001.60	643,426	1,170.10	641,198	832.60
63	187,858	1,133.70	104,277	1,298.40	83,581	928.20
64	200,272	1,178.50	107,432	1,365.90	92,840	961.70
65–69	1,031,515	1,413.80	586,609	1,594.60	444,906	1,175.50
65	332,667	1,384.10	188,517	1,560.00	144,150	1,154.10
66	650,068	1,428.90	377,309	1,611.90	272,759	1,175.70
Disability conversions	323,456	1,243.60	175,724	1,417.50	147,732	1,036.80
New entitlements	326,612	1,697.80	201,585	1,876.10	125,027	1,410.30
67	22,740	1,447.90	11,045	1,637.10	11,695	1,269.20
68	13,895	1,385.60	5,626	1,558.20	8,269	1,268.10
69	12,145	1,392.20	4,112	1,528.30	8,033	1,322.50
70–74	27,541	1,339.80	8,475	1,364.80	19,066	1,328.70
75 or older	8,156	808.70	2,110	653.50	6,046	862.80
Disabled workers						
Total	970,696	1,119.90	521,424	1,255.00	449,272	963.10
Under 25	41,927	585.10	24,604	599.10	17,323	565.20
25–29	37,512	806.90	19,638	831.90	17,874	779.40
30–34	44,143	905.20	21,984	947.60	22,159	863.20
35–39	63,820	967.30	31,797	1,039.60	32,023	895.50
40–44	92,626	1,021.50	46,521	1,123.10	46,105	918.90
45–49	129,397	1,089.30	65,353	1,214.10	64,044	962.00
50–54	191,302	1,157.60	99,731	1,306.70	91,571	995.30
50	44,901	1,108.40	23,275	1,251.00	21,626	955.00
51	36,115	1,144.60	18,828	1,288.60	17,287	987.70
52	36,714	1,163.70	19,052	1,315.00	17,662	1,000.40
53	36,525	1,183.00	19,125	1,337.10	17,400	1,013.60
54	37,047	1,199.00	19,451	1,352.80	17,596	1,029.00
55–59	220,879	1,253.40	123,124	1,421.60	97,755	1,041.50
55	50,651	1,213.80	28,043	1,370.40	22,608	1,019.60
56	42,542	1,239.60	23,209	1,405.70	19,333	1,040.20
57	42,237	1,256.30	23,420	1,425.90	18,817	1,045.30
58	42,567	1,268.30	23,943	1,442.30	18,624	1,044.70
59	42,882	1,295.90	24,509	1,470.90	18,373	1,062.60
60–65	149,090	1,319.40	88,672	1,493.90	60,418	1,063.30
60	45,349	1,314.50	26,392	1,490.80	18,957	1,069.10
61	37,764	1,327.60	22,298	1,506.80	15,466	1,069.40
62	29,870	1,339.90	17,893	1,521.50	11,977	1,068.70
63	18,557	1,312.50	11,173	1,486.00	7,384	1,050.00
64	11,929	1,291.70	7,281	1,449.70	4,648	1,044.30
65	5,621	1,276.30	3,635	1,415.50	1,986	1,021.40

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Effective 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

Effective 2006, age is based on date of entitlement and not date of award. Entitlement can be retroactive and thus precede the date of award.

- a. Benefits awarded before the December cost-of-living increase are converted to the December rates before averages are computed.
- b. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

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Table 6.A5—Number and average monthly benefit with reduction for early retirement, by type of benefit, age, and sex, 2009

Age	Total		Men		Women	
	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)
Retired workers						
Total	2,004,209	1,093.10	1,043,472	1,271.50	960,737	899.40
62	1,284,624	1,001.60	643,426	1,170.10	641,198	832.60
63	187,858	1,133.70	104,277	1,298.40	83,581	928.20
64	200,058	1,178.40	107,294	1,365.80	92,764	961.70
65	300,991	1,383.60	170,280	1,560.30	130,711	1,153.30
66	30,147	1,278.10	18,192	1,444.90	11,955	1,024.30
Disability conversions	29,648	1,279.00	17,876	1,445.90	11,772	1,025.60
New entitlements	499	1,254.00	316	1,418.10	183	988.60
67 or older	531	745.60	3	339.30	528	747.90
Disabled workers						
Total	41,673	1,277.40	25,455	1,449.40	16,218	1,007.40
62	18,419	1,300.30	11,023	1,485.30	7,396	1,024.50
63	11,960	1,275.30	7,330	1,447.60	4,630	1,002.60
64	7,780	1,238.20	4,850	1,395.10	2,930	978.60
65	3,514	1,250.80	2,252	1,396.40	1,262	991.00
Wives and husbands						
Total	313,953	394.30	9,635	290.20	304,318	397.60
<i>By basis of entitlement</i>						
Wives and husbands of retired workers	280,976	401.50	8,207	295.40	272,769	404.70
Wives and husbands of disabled workers	32,977	332.80	1,428	260.10	31,549	336.10
<i>By sex</i>						
Wives	304,318	397.60	...	...	304,318	397.60
62	167,100	373.30	...	...	167,100	373.30
63	41,341	374.80	...	...	41,341	374.80
64	52,586	451.30	...	...	52,586	451.30
65	42,417	447.70	...	...	42,417	447.70
66	234	403.90	...	...	234	403.90
67 or older	640	488.70	...	...	640	488.70
Husbands	9,635	290.20	9,635	290.20	...	...
Nondisabled widow(er)s						
Total	217,627	1,030.90	19,694	869.60	197,933	1,046.90
Nondisabled widows	197,933	1,046.90	...	...	197,933	1,046.90
60	66,625	1,083.70	...	...	66,625	1,083.70
61	27,399	1,132.50	...	...	27,399	1,132.50
62	25,339	1,078.30	...	...	25,339	1,078.30
63	17,166	1,041.70	...	...	17,166	1,041.70
64	21,294	1,086.00	...	...	21,294	1,086.00
65	36,035	944.70	...	...	36,035	944.70
66	297	578.40	...	...	297	578.40
67–69	702	434.60	...	...	702	434.60
70 or older	3,076	370.10	...	...	3,076	370.10
Nondisabled widowers	19,694	869.60	19,694	869.60	...	...

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Effective 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

Effective 2006, age is based on date of entitlement and not date of award. Entitlement can be retroactive and thus precede the date of award.

... = not applicable.

a. Benefits awarded before the December cost-of-living increase are converted to the December rates before averages are computed.

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6.A OASDI Benefits Awarded: Summary

Table 6.A6—Number, percentage distribution, and average monthly benefit for retired and disabled workers, by state or other area, 2009

State or area	Retired workers			Disabled workers		
	Number	Percent	Average monthly benefit ^a (dollars)	Number	Percent	Average monthly benefit ^a (dollars)
All areas	2,739,966	100.0	1,181.60	970,696	100.0	1,119.90
Alabama	47,002	1.7	1,156.70	25,430	2.6	1,101.80
Alaska	5,073	0.2	1,125.40	1,608	0.2	1,121.40
Arizona	58,932	2.2	1,196.90	14,270	1.5	1,175.70
Arkansas	28,098	1.0	1,112.70	15,659	1.6	1,061.60
California	275,147	10.0	1,158.90	74,750	7.7	1,063.30
Colorado	40,482	1.5	1,170.00	10,188	1.0	1,150.40
Connecticut	32,906	1.2	1,317.00	7,532	0.8	1,203.80
Delaware	9,099	0.3	1,267.70	3,178	0.3	1,175.10
District of Columbia	3,948	0.1	1,125.00	1,755	0.2	989.50
Florida	194,475	7.1	1,151.40	58,932	6.1	1,125.70
Georgia	83,567	3.0	1,164.20	33,690	3.5	1,128.80
Hawaii	13,146	0.5	1,188.10	2,874	0.3	1,167.10
Idaho	14,334	0.5	1,133.40	4,487	0.5	1,082.00
Illinois	100,880	3.7	1,210.50	33,101	3.4	1,168.40
Indiana	59,884	2.2	1,236.20	23,446	2.4	1,165.70
Iowa	27,792	1.0	1,180.40	8,202	0.8	1,102.50
Kansas	24,004	0.9	1,212.60	9,387	1.0	1,092.80
Kentucky	39,149	1.4	1,122.60	21,917	2.3	1,086.60
Louisiana	34,417	1.3	1,104.50	17,157	1.8	1,061.50
Maine	14,662	0.5	1,083.50	4,807	0.5	1,060.00
Maryland	47,063	1.7	1,245.70	15,152	1.6	1,161.10
Massachusetts	53,773	2.0	1,213.40	19,636	2.0	1,130.50
Michigan	98,191	3.6	1,281.40	42,705	4.4	1,183.40
Minnesota	44,988	1.6	1,244.00	13,961	1.4	1,125.50
Mississippi	26,896	1.0	1,108.00	13,952	1.4	1,086.60
Missouri	55,433	2.0	1,162.60	23,441	2.4	1,106.60
Montana	10,527	0.4	1,101.40	2,941	0.3	1,041.70
Nebraska	14,616	0.5	1,171.30	4,677	0.5	1,085.70
Nevada	25,722	0.9	1,152.50	6,555	0.7	1,159.70
New Hampshire	13,556	0.5	1,251.70	4,508	0.5	1,152.70
New Jersey	77,631	2.8	1,318.70	23,582	2.4	1,254.40
New Mexico	18,358	0.7	1,104.50	6,513	0.7	1,048.20
New York	162,581	5.9	1,244.40	58,037	6.0	1,150.20
North Carolina	94,202	3.4	1,183.80	36,892	3.8	1,128.30
North Dakota	5,303	0.2	1,097.50	1,427	0.1	1,067.30
Ohio	102,086	3.7	1,171.20	38,591	4.0	1,098.60
Oklahoma	33,667	1.2	1,141.30	14,102	1.5	1,067.50
Oregon	39,758	1.5	1,175.10	12,102	1.2	1,135.00
Pennsylvania	120,516	4.4	1,228.80	40,983	4.2	1,118.50
Rhode Island	10,150	0.4	1,212.30	3,385	0.3	1,096.90
South Carolina	49,666	1.8	1,173.10	21,318	2.2	1,141.00
South Dakota	7,384	0.3	1,111.10	1,905	0.2	1,042.40
Tennessee	64,600	2.4	1,163.50	26,797	2.8	1,107.60
Texas	173,920	6.3	1,152.50	68,010	7.0	1,093.00
Utah	16,960	0.6	1,195.20	5,071	0.5	1,118.70

(Continued)

6.A OASDI Benefits Awarded: Summary

Table 6.A6—Number, percentage distribution, and average monthly benefit for retired and disabled workers, by state or other area, 2009—Continued

State or area	Retired workers			Disabled workers		
	Number	Percent	Average monthly benefit ^a (dollars)	Number	Percent	Average monthly benefit ^a (dollars)
Vermont	6,861	0.3	1,195.70	2,255	0.2	1,062.60
Virginia	68,321	2.5	1,210.90	20,689	2.1	1,137.80
Washington	60,609	2.2	1,228.40	19,499	2.0	1,159.50
West Virginia	18,371	0.7	1,154.90	8,295	0.9	1,127.90
Wisconsin	53,181	1.9	1,226.50	19,303	2.0	1,148.50
Wyoming	5,127	0.2	1,184.60	1,464	0.2	1,134.30
Outlying areas						
Puerto Rico	29,013	1.1	796.00	19,221	2.0	988.50
Other ^b	23,939	0.9	636.00	1,357	0.1	908.70

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Effective 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

Totals do not necessarily equal the sum of rounded components.

a. Benefits awarded before the December cost-of-living increase are converted to the December rates before averages are computed.

b. Includes American Samoa, Guam, Northern Mariana Islands, U.S. Virgin Islands, and foreign countries.

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6.B OASDI Benefits Awarded: Retired Workers

Table 6.B1—Number of initial awards to retired workers aged 62–64, average primary insurance amount, average monthly benefit, and number of months benefits withheld due to earnings, by sex and age, 2009

Age	All initial awards ^a	Benefits received for all entitlement months ^b	Benefits withheld due to earnings for—			
			All entitlement months	Less than one-half of entitlement months	One-half or more of entitlement months	
Number						
<i>All beneficiaries</i>						
Total	1,618,100	1,491,200	18,600	68,800	24,100	
62	1,247,100	1,164,800	12,800	43,500	16,100	
63	185,500	167,400	2,400	11,300	2,000	
64	185,500	159,000	3,400	14,000	6,000	
<i>Men</i>						
Subtotal	821,000	754,800	10,500	36,000	11,300	
62	619,500	575,400	7,600	23,500	7,600	
63	103,300	93,500	1,300	5,700	1,500	
64	98,200	85,900	1,600	6,800	2,200	
<i>Women</i>						
Subtotal	797,100	736,400	8,100	32,800	12,800	
62	627,600	589,400	5,200	20,000	8,500	
63	82,200	73,900	1,100	5,600	500	
64	87,300	73,100	1,800	7,200	3,800	
Average primary insurance amount^c (dollars)						
<i>All beneficiaries</i>						
Total	1,307.30	1,303.70	1,423.40	1,402.20	1,293.30	
62	1,297.20	1,294.20	1,394.40	1,393.50	1,288.20	
63	1,360.60	1,357.50	1,362.90	1,426.10	1,522.30	
64	1,322.30	1,317.00	1,575.60	1,409.90	1,231.00	
<i>Men</i>						
Subtotal	1,541.90	1,539.70	1,594.00	1,627.30	1,558.80	
62	1,532.20	1,530.70	1,555.70	1,607.60	1,565.70	
63	1,595.90	1,598.90	1,426.40	1,672.50	1,564.20	
64	1,546.70	1,535.70	1,912.30	1,657.70	1,531.50	
<i>Women</i>						
Subtotal	1,065.60	1,061.80	1,202.30	1,155.10	1,059.00	
62	1,065.20	1,063.30	1,158.60	1,141.90	1,040.00	
63	1,064.80	1,052.10	1,287.80	1,175.40	1,396.60	
64	1,069.90	1,060.10	1,276.20	1,175.90	1,057.00	
Average monthly benefit^c (dollars)						
<i>All beneficiaries</i>						
Total	1,043.60	1,039.80	1,131.10	1,136.00	1,044.40	
62	1,005.60	1,003.90	1,062.20	1,074.40	991.30	
63	1,136.60	1,134.50	1,107.60	1,194.20	1,252.00	
64	1,206.00	1,202.90	1,407.10	1,280.50	1,117.70	
<i>Men</i>						
Subtotal	1,208.30	1,204.80	1,257.40	1,300.50	1,245.00	
62	1,162.60	1,161.30	1,177.60	1,223.00	1,192.40	
63	1,314.20	1,316.10	1,159.50	1,391.80	1,290.80	
64	1,385.50	1,374.80	1,716.10	1,491.80	1,395.50	
<i>Women</i>						
Subtotal	873.90	870.60	967.40	955.50	867.30	
62	850.60	850.20	893.60	899.80	811.40	
63	913.30	904.90	1,046.20	993.10	1,135.40	
64	1,004.10	1,000.90	1,132.40	1,081.00	956.90	

SOURCE: Social Security Administration, Master Beneficiary Record, 1 percent sample.

NOTES: Excludes persons whose benefits were converted from disabled worker to retired worker. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

a. Includes 15,400 awards for which benefits were withheld for reasons other than earnings.

b. Months of entitlement begin with the month of award and end either in December or the month before the retired-worker benefit is terminated.

c. Amount for December or the amount for the latest month of entitlement multiplied by the December benefit increase.

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6.B OASDI Benefits Awarded: Retired Workers

Table 6.B3—Number and percentage distribution with and without reduction for early retirement, by sex and monthly benefit, 2009

Sex and monthly benefit (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	2,739,966	100.0	735,757	100.0	2,004,209	100.0
Less than 500.00	250,577	9.1	41,541	5.6	209,036	10.4
500.00–549.90	63,430	2.3	6,570	0.9	56,860	2.8
550.00–599.90	73,727	2.7	9,156	1.2	64,571	3.2
600.00–649.90	81,156	3.0	10,720	1.5	70,436	3.5
650.00–699.90	88,399	3.2	14,956	2.0	73,443	3.7
700.00–749.90	96,455	3.5	16,688	2.3	79,767	4.0
750.00–799.90	97,923	3.6	17,949	2.4	79,974	4.0
800.00–849.90	97,431	3.6	18,767	2.6	78,664	3.9
850.00–899.90	89,140	3.3	20,183	2.7	68,957	3.4
900.00–949.90	87,181	3.2	20,681	2.8	66,500	3.3
950.00–999.90	85,252	3.1	20,769	2.8	64,483	3.2
1,000.00–1,049.90	85,709	3.1	20,963	2.8	64,746	3.2
1,050.00–1,099.90	83,137	3.0	20,787	2.8	62,350	3.1
1,100.00–1,149.90	81,663	3.0	20,937	2.8	60,726	3.0
1,150.00–1,199.90	78,715	2.9	20,469	2.8	58,246	2.9
1,200.00–1,249.90	77,264	2.8	20,071	2.7	57,193	2.9
1,250.00–1,299.90	75,171	2.7	19,826	2.7	55,345	2.8
1,300.00–1,349.90	73,612	2.7	19,997	2.7	53,615	2.7
1,350.00–1,399.90	70,985	2.6	19,612	2.7	51,373	2.6
1,400.00–1,449.90	92,746	3.4	19,168	2.6	73,578	3.7
1,450.00–1,499.90	95,158	3.5	18,837	2.6	76,321	3.8
1,500.00–1,549.90	91,920	3.4	18,428	2.5	73,492	3.7
1,550.00–1,599.90	85,450	3.1	18,855	2.6	66,595	3.3
1,600.00–1,649.90	80,600	2.9	18,975	2.6	61,625	3.1
1,650.00–1,699.90	72,004	2.6	17,660	2.4	54,344	2.7
1,700.00–1,749.90	66,284	2.4	17,123	2.3	49,161	2.5
1,750.00–1,799.90	51,639	1.9	16,389	2.2	35,250	1.8
1,800.00–1,849.90	48,001	1.8	19,178	2.6	28,823	1.4
1,850.00–1,899.90	47,289	1.7	23,570	3.2	23,719	1.2
1,900.00–1,949.90	41,704	1.5	21,824	3.0	19,880	1.0
1,950.00–1,999.90	36,060	1.3	20,125	2.7	15,935	0.8
2,000.00–2,049.90	32,810	1.2	18,651	2.5	14,159	0.7
2,050.00–2,099.90	28,527	1.0	17,385	2.4	11,142	0.6
2,100.00 or more	132,847	4.8	108,947	14.8	23,900	1.2
Average benefit (dollars)	1,181.60		1,422.80		1,093.10	

(Continued)

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B3—Number and percentage distribution with and without reduction for early retirement, by sex and monthly benefit, 2009—Continued

Sex and monthly benefit (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Men	1,452,329	100.0	408,857	100.0	1,043,472	100.0
Less than 500.00	97,036	6.7	18,928	4.6	78,108	7.5
500.00–549.90	19,328	1.3	2,550	0.6	16,778	1.6
550.00–599.90	22,227	1.5	3,126	0.8	19,101	1.8
600.00–649.90	24,332	1.7	3,391	0.8	20,941	2.0
650.00–699.90	26,335	1.8	4,971	1.2	21,364	2.0
700.00–749.90	27,318	1.9	5,519	1.3	21,799	2.1
750.00–799.90	28,138	1.9	6,099	1.5	22,039	2.1
800.00–849.90	29,380	2.0	6,363	1.6	23,017	2.2
850.00–899.90	30,320	2.1	6,777	1.7	23,543	2.3
900.00–949.90	32,143	2.2	6,961	1.7	25,182	2.4
950.00–999.90	33,281	2.3	7,229	1.8	26,052	2.5
1,000.00–1,049.90	35,568	2.4	7,531	1.8	28,037	2.7
1,050.00–1,099.90	36,970	2.5	7,869	1.9	29,101	2.8
1,100.00–1,149.90	38,407	2.6	8,121	2.0	30,286	2.9
1,150.00–1,199.90	38,829	2.7	8,344	2.0	30,485	2.9
1,200.00–1,249.90	39,807	2.7	8,662	2.1	31,145	3.0
1,250.00–1,299.90	40,736	2.8	8,979	2.2	31,757	3.0
1,300.00–1,349.90	41,474	2.9	9,206	2.3	32,268	3.1
1,350.00–1,399.90	41,736	2.9	9,461	2.3	32,275	3.1
1,400.00–1,449.90	59,383	4.1	9,552	2.3	49,831	4.8
1,450.00–1,499.90	64,835	4.5	9,867	2.4	54,968	5.3
1,500.00–1,549.90	65,511	4.5	9,985	2.4	55,526	5.3
1,550.00–1,599.90	63,305	4.4	11,042	2.7	52,263	5.0
1,600.00–1,649.90	61,418	4.2	11,494	2.8	49,924	4.8
1,650.00–1,699.90	56,581	3.9	10,968	2.7	45,613	4.4
1,700.00–1,749.90	53,078	3.7	11,072	2.7	42,006	4.0
1,750.00–1,799.90	40,652	2.8	10,858	2.7	29,794	2.9
1,800.00–1,849.90	36,876	2.5	12,989	3.2	23,887	2.3
1,850.00–1,899.90	36,647	2.5	16,530	4.0	20,117	1.9
1,900.00–1,949.90	32,796	2.3	15,678	3.8	17,118	1.6
1,950.00–1,999.90	28,935	2.0	15,014	3.7	13,921	1.3
2,000.00–2,049.90	26,974	1.9	14,305	3.5	12,669	1.2
2,050.00–2,099.90	23,823	1.6	13,738	3.4	10,085	1.0
2,100.00 or more	118,150	8.1	95,678	23.4	22,472	2.2
Average benefit (dollars)	1,365.60		1,605.90		1,271.50	

(Continued)

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B3—Number and percentage distribution with and without reduction for early retirement, by sex and monthly benefit, 2009—Continued

Sex and monthly benefit (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	1,287,637	100.0	326,900	100.0	960,737	100.0
Less than 500.00	153,541	11.9	22,613	6.9	130,928	13.6
500.00–549.90	44,102	3.4	4,020	1.2	40,082	4.2
550.00–599.90	51,500	4.0	6,030	1.8	45,470	4.7
600.00–649.90	56,824	4.4	7,329	2.2	49,495	5.2
650.00–699.90	62,064	4.8	9,985	3.1	52,079	5.4
700.00–749.90	69,137	5.4	11,169	3.4	57,968	6.0
750.00–799.90	69,785	5.4	11,850	3.6	57,935	6.0
800.00–849.90	68,051	5.3	12,404	3.8	55,647	5.8
850.00–899.90	58,820	4.6	13,406	4.1	45,414	4.7
900.00–949.90	55,038	4.3	13,720	4.2	41,318	4.3
950.00–999.90	51,971	4.0	13,540	4.1	38,431	4.0
1,000.00–1,049.90	50,141	3.9	13,432	4.1	36,709	3.8
1,050.00–1,099.90	46,167	3.6	12,918	4.0	33,249	3.5
1,100.00–1,149.90	43,256	3.4	12,816	3.9	30,440	3.2
1,150.00–1,199.90	39,886	3.1	12,125	3.7	27,761	2.9
1,200.00–1,249.90	37,457	2.9	11,409	3.5	26,048	2.7
1,250.00–1,299.90	34,435	2.7	10,847	3.3	23,588	2.5
1,300.00–1,349.90	32,138	2.5	10,791	3.3	21,347	2.2
1,350.00–1,399.90	29,249	2.3	10,151	3.1	19,098	2.0
1,400.00–1,449.90	33,363	2.6	9,616	2.9	23,747	2.5
1,450.00–1,499.90	30,323	2.4	8,970	2.7	21,353	2.2
1,500.00–1,549.90	26,409	2.1	8,443	2.6	17,966	1.9
1,550.00–1,599.90	22,145	1.7	7,813	2.4	14,332	1.5
1,600.00–1,649.90	19,182	1.5	7,481	2.3	11,701	1.2
1,650.00–1,699.90	15,423	1.2	6,692	2.0	8,731	0.9
1,700.00–1,749.90	13,206	1.0	6,051	1.9	7,155	0.7
1,750.00–1,799.90	10,987	0.9	5,531	1.7	5,456	0.6
1,800.00–1,849.90	11,125	0.9	6,189	1.9	4,936	0.5
1,850.00–1,899.90	10,642	0.8	7,040	2.2	3,602	0.4
1,900.00–1,949.90	8,908	0.7	6,146	1.9	2,762	0.3
1,950.00–1,999.90	7,125	0.6	5,111	1.6	2,014	0.2
2,000.00–2,049.90	5,836	0.5	4,346	1.3	1,490	0.2
2,050.00–2,099.90	4,704	0.4	3,647	1.1	1,057	0.1
2,100.00 or more	14,697	1.1	13,269	4.1	1,428	0.1
Average benefit (dollars)	974.10		1,193.70		899.40	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Benefits awarded before the December cost-of-living increase are converted to the December rates before percentages are computed.

Totals do not necessarily equal the sum of rounded components.

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6.B OASDI Benefits Awarded: Retired Workers

Table 6.B4—Number and percentage distribution with and without reduction for early retirement, by sex and primary insurance amount, 2009

Sex and primary insurance amount (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	2,739,966	100.0	735,757	100.0	2,004,209	100.0
Less than 500.00	225,158	8.2	50,836	6.9	174,322	8.7
500.00–549.90	34,534	1.3	7,981	1.1	26,553	1.3
550.00–599.90	37,494	1.4	11,287	1.5	26,207	1.3
600.00–649.90	39,400	1.4	13,372	1.8	26,028	1.3
650.00–699.90	69,976	2.6	18,846	2.6	51,130	2.6
700.00–749.90	84,498	3.1	20,104	2.7	64,394	3.2
750.00–799.90	82,754	3.0	20,472	2.8	62,282	3.1
800.00–849.90	81,572	3.0	20,485	2.8	61,087	3.0
850.00–899.90	79,538	2.9	20,889	2.8	58,649	2.9
900.00–949.90	78,236	2.9	20,803	2.8	57,433	2.9
950.00–999.90	76,860	2.8	20,657	2.8	56,203	2.8
1,000.00–1,049.90	75,842	2.8	20,641	2.8	55,201	2.8
1,050.00–1,099.90	75,044	2.7	20,190	2.7	54,854	2.7
1,100.00–1,149.90	74,313	2.7	20,135	2.7	54,178	2.7
1,150.00–1,199.90	73,024	2.7	19,926	2.7	53,098	2.6
1,200.00–1,249.90	71,758	2.6	19,471	2.6	52,287	2.6
1,250.00–1,299.90	70,239	2.6	18,999	2.6	51,240	2.6
1,300.00–1,349.90	69,816	2.5	18,898	2.6	50,918	2.5
1,350.00–1,399.90	68,022	2.5	18,332	2.5	49,690	2.5
1,400.00–1,449.90	66,273	2.4	17,720	2.4	48,553	2.4
1,450.00–1,499.90	64,956	2.4	17,385	2.4	47,571	2.4
1,500.00–1,549.90	63,711	2.3	16,937	2.3	46,774	2.3
1,550.00–1,599.90	63,130	2.3	17,392	2.4	45,738	2.3
1,600.00–1,649.90	61,415	2.2	17,442	2.4	43,973	2.2
1,650.00–1,699.90	59,447	2.2	16,298	2.2	43,149	2.2
1,700.00–1,749.90	57,402	2.1	15,770	2.1	41,632	2.1
1,750.00–1,799.90	55,732	2.0	15,435	2.1	40,297	2.0
1,800.00–1,849.90	61,098	2.2	18,565	2.5	42,533	2.1
1,850.00–1,899.90	90,518	3.3	23,680	3.2	66,838	3.3
1,900.00–1,949.90	95,097	3.5	21,713	3.0	73,384	3.7
1,950.00–1,999.90	86,897	3.2	19,792	2.7	67,105	3.3
2,000.00–2,049.90	79,196	2.9	18,498	2.5	60,698	3.0
2,050.00–2,099.90	71,302	2.6	17,280	2.3	54,022	2.7
2,100.00 or more	295,714	10.8	99,526	13.5	196,188	9.8
Average primary insurance amount (dollars)	1,339.70		1,372.10		1,327.80	

(Continued)

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B4—Number and percentage distribution with and without reduction for early retirement, by sex and primary insurance amount, 2009—Continued

Sex and primary insurance amount (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Men	1,452,329	100.0	408,857	100.0	1,043,472	100.0
Less than 500.00	78,868	5.4	19,734	4.8	59,134	5.7
500.00–549.90	10,717	0.7	2,602	0.6	8,115	0.8
550.00–599.90	11,058	0.8	3,199	0.8	7,859	0.8
600.00–649.90	11,134	0.8	3,612	0.9	7,522	0.7
650.00–699.90	19,432	1.3	5,409	1.3	14,023	1.3
700.00–749.90	23,367	1.6	5,906	1.4	17,461	1.7
750.00–799.90	23,172	1.6	6,217	1.5	16,955	1.6
800.00–849.90	23,424	1.6	6,363	1.6	17,061	1.6
850.00–899.90	23,832	1.6	6,734	1.6	17,098	1.6
900.00–949.90	24,025	1.7	6,981	1.7	17,044	1.6
950.00–999.90	24,768	1.7	7,256	1.8	17,512	1.7
1,000.00–1,049.90	25,745	1.8	7,532	1.8	18,213	1.7
1,050.00–1,099.90	26,765	1.8	7,841	1.9	18,924	1.8
1,100.00–1,149.90	27,975	1.9	8,105	2.0	19,870	1.9
1,150.00–1,199.90	28,981	2.0	8,356	2.0	20,625	2.0
1,200.00–1,249.90	30,427	2.1	8,753	2.1	21,674	2.1
1,250.00–1,299.90	31,573	2.2	8,965	2.2	22,608	2.2
1,300.00–1,349.90	33,016	2.3	9,240	2.3	23,776	2.3
1,350.00–1,399.90	34,338	2.4	9,533	2.3	24,805	2.4
1,400.00–1,449.90	35,084	2.4	9,531	2.3	25,553	2.4
1,450.00–1,499.90	36,178	2.5	9,875	2.4	26,303	2.5
1,500.00–1,549.90	37,126	2.6	10,040	2.5	27,086	2.6
1,550.00–1,599.90	38,494	2.7	11,068	2.7	27,426	2.6
1,600.00–1,649.90	38,775	2.7	11,566	2.8	27,209	2.6
1,650.00–1,699.90	38,541	2.7	10,984	2.7	27,557	2.6
1,700.00–1,749.90	38,517	2.7	11,044	2.7	27,473	2.6
1,750.00–1,799.90	38,404	2.6	10,971	2.7	27,433	2.6
1,800.00–1,849.90	43,008	3.0	13,252	3.2	29,756	2.9
1,850.00–1,899.90	65,701	4.5	17,164	4.2	48,537	4.7
1,900.00–1,949.90	71,597	4.9	16,221	4.0	55,376	5.3
1,950.00–1,999.90	67,700	4.7	15,315	3.7	52,385	5.0
2,000.00–2,049.90	63,811	4.4	14,741	3.6	49,070	4.7
2,050.00–2,099.90	59,193	4.1	14,118	3.5	45,075	4.3
2,100.00 or more	267,583	18.4	90,629	22.2	176,954	17.0
Average primary insurance amount (dollars)	1,563.60		1,585.20		1,555.20	

(Continued)

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B4—Number and percentage distribution with and without reduction for early retirement, by sex and primary insurance amount, 2009—Continued

Sex and primary insurance amount (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	1,287,637	100.0	326,900	100.0	960,737	100.0
Less than 500.00	146,290	11.4	31,102	9.5	115,188	12.0
500.00–549.90	23,817	1.8	5,379	1.6	18,438	1.9
550.00–599.90	26,436	2.1	8,088	2.5	18,348	1.9
600.00–649.90	28,266	2.2	9,760	3.0	18,506	1.9
650.00–699.90	50,544	3.9	13,437	4.1	37,107	3.9
700.00–749.90	61,131	4.7	14,198	4.3	46,933	4.9
750.00–799.90	59,582	4.6	14,255	4.4	45,327	4.7
800.00–849.90	58,148	4.5	14,122	4.3	44,026	4.6
850.00–899.90	55,706	4.3	14,155	4.3	41,551	4.3
900.00–949.90	54,211	4.2	13,822	4.2	40,389	4.2
950.00–999.90	52,092	4.0	13,401	4.1	38,691	4.0
1,000.00–1,049.90	50,097	3.9	13,109	4.0	36,988	3.8
1,050.00–1,099.90	48,279	3.7	12,349	3.8	35,930	3.7
1,100.00–1,149.90	46,338	3.6	12,030	3.7	34,308	3.6
1,150.00–1,199.90	44,043	3.4	11,570	3.5	32,473	3.4
1,200.00–1,249.90	41,331	3.2	10,718	3.3	30,613	3.2
1,250.00–1,299.90	38,666	3.0	10,034	3.1	28,632	3.0
1,300.00–1,349.90	36,800	2.9	9,658	3.0	27,142	2.8
1,350.00–1,399.90	33,684	2.6	8,799	2.7	24,885	2.6
1,400.00–1,449.90	31,189	2.4	8,189	2.5	23,000	2.4
1,450.00–1,499.90	28,778	2.2	7,510	2.3	21,268	2.2
1,500.00–1,549.90	26,585	2.1	6,897	2.1	19,688	2.0
1,550.00–1,599.90	24,636	1.9	6,324	1.9	18,312	1.9
1,600.00–1,649.90	22,640	1.8	5,876	1.8	16,764	1.7
1,650.00–1,699.90	20,906	1.6	5,314	1.6	15,592	1.6
1,700.00–1,749.90	18,885	1.5	4,726	1.4	14,159	1.5
1,750.00–1,799.90	17,328	1.3	4,464	1.4	12,864	1.3
1,800.00–1,849.90	18,090	1.4	5,313	1.6	12,777	1.3
1,850.00–1,899.90	24,817	1.9	6,516	2.0	18,301	1.9
1,900.00–1,949.90	23,500	1.8	5,492	1.7	18,008	1.9
1,950.00–1,999.90	19,197	1.5	4,477	1.4	14,720	1.5
2,000.00–2,049.90	15,385	1.2	3,757	1.1	11,628	1.2
2,050.00–2,099.90	12,109	0.9	3,162	1.0	8,947	0.9
2,100.00 or more	28,131	2.2	8,897	2.7	19,234	2.0
Average primary insurance amount (dollars)	1,087.20		1,105.60		1,080.90	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Primary insurance amounts awarded before the December cost-of-living increase are converted to the December rates before percentages are computed.

Totals do not necessarily equal the sum of rounded components.

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6.B OASDI Benefits Awarded: Retired Workers

Table 6.B5—Number, average age, and percentage distribution, by sex and age, selected years 1940–2009

Year	Number (thousands)	Average age	Percentage distribution by age ^a										
			Total, all ages	62	63	64	65	Full retirement age (FRA) ^b			66–69 ^c	70–74	75 or older
								Total	Newly entitled	Disability conversions			
Men													
1940	117	68.1	100.0	...	...	...	b	17.1	17.1	...	58.8	16.5	7.6
1945	166	69.6	100.0	...	...	...	b	15.9	15.9	...	43.3	28.1	12.7
1950	444	68.7	100.0	...	...	...	b	21.9	21.9	...	47.3	21.0	9.8
1955	629	68.4	100.0	...	...	...	b	29.4	29.4	...	38.0	24.7	7.8
1960	630	66.8	100.0	...	...	...	b	48.1	42.3	5.8	36.6	13.2	2.1
1965	743	65.7	100.0	15.6	10.0	6.0	b	31.6	25.8	5.8	25.9	7.7	3.2
1970	814	64.4	100.0	19.0	12.8	8.5	b	48.7	39.6	9.1	9.3	1.3	0.4
1975	902	64.0	100.0	25.8	14.1	9.0	b	43.6	32.0	11.6	6.5	0.7	0.2
1980	942	63.9	100.0	30.1	13.1	8.5	b	42.4	31.8	10.6	5.2	0.6	0.1
1985	986	63.7	100.0	45.5	8.2	11.6	b	31.2	18.2	13.1	2.9	0.5	0.2
1986	1,011	63.7	100.0	47.0	8.2	11.8	b	29.2	17.2	12.0	3.1	0.6	0.1
1987	970	63.6	100.0	47.6	8.1	11.4	b	28.8	16.8	12.0	3.4	0.6	0.1
1988	944	63.7	100.0	48.2	8.1	9.9	b	28.6	16.6	12.0	4.1	0.9	0.2
1989	983	63.7	100.0	48.0	7.1	9.3	b	30.1	17.5	12.6	4.6	0.7	0.2
1990	964	63.7	100.0	47.2	7.6	11.3	b	27.6	16.4	11.1	5.1	1.0	0.2
1991	996	63.7	100.0	46.8	8.1	10.9	b	27.9	17.2	10.7	5.1	0.9	0.2
1992	989	63.7	100.0	48.2	7.3	11.4	b	27.2	16.6	10.6	5.0	0.8	0.1
1993	980	63.7	100.0	48.7	8.0	11.0	b	26.7	16.1	10.5	4.5	0.9	0.2
1994	923	63.6	100.0	49.0	7.4	11.4	b	27.1	15.7	11.5	4.0	1.0	0.1
1995	916	63.7	100.0	49.3	7.3	10.5	b	27.5	15.8	11.8	4.0	1.1	0.3
1996	895	63.6	100.0	49.9	7.1	9.7	b	27.6	14.9	12.6	4.5	1.1	0.1
1997	904	63.7	100.0	50.5	6.6	9.7	b	26.9	14.9	12.0	4.7	1.3	0.2
1998	909	63.8	100.0	49.6	7.1	9.9	b	27.3	14.7	12.6	4.6	1.3	0.2
1999	940	63.7	100.0	49.3	7.3	9.8	b	27.4	14.8	12.6	4.7	1.3	0.2
2000	1,115	64.1	100.0	41.6	6.1	9.4	b	31.7	20.3	11.4	9.9	1.1	0.2
2001	992	63.7	100.0	46.8	6.7	12.1	b	30.8	18.1	12.7	2.8	0.7	0.2
2002	1,001	63.7	100.0	46.4	7.1	13.8	b	29.7	17.1	12.6	2.1	0.7	0.2
2003	969	63.6	100.0	48.3	7.2	11.9	b	29.6	17.9	11.7	2.1	0.7	0.2
2004	1,010	63.7	100.0	49.0	7.4	10.2	b	30.0	18.7	11.3	2.4	0.7	0.3
2005	1,061	63.8	100.0	48.6	7.6	9.1	b	30.8	19.9	10.9	2.7	0.8	0.5
2006	1,057	63.5	100.0	45.6	7.7	9.2	b	34.5	22.4	12.1	2.2	0.7	0.3
2007	1,075	63.6	100.0	42.4	7.4	9.3	b	37.5	25.0	12.5	2.5	0.7	0.2
2008	1,200	63.6	100.0	42.5	7.0	8.5	b	38.4	26.1	12.3	2.8	0.6	0.2
2009	1,452	63.8	100.0	44.3	7.2	7.4	13.0	26.0	13.9	12.1	1.4	0.6	0.1

(Continued)

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B5—Number, average age, and percentage distribution, by sex and age, selected years 1940–2009—Continued

Year	Number (thousands)	Average age	Percentage distribution by age ^a										
			Total, all ages	62	63	64	65	Full retirement age (FRA) ^b			66–69 ^c	70–74	75 or older
								Total	Newly entitled	Disability conversions			
Women													
1940	15	67.4	100.0	...	...	...	b	20.8	20.8	...	62.3	12.5	4.3
1945	20	68.5	100.0	...	...	...	b	24.0	24.0	...	45.0	23.6	7.3
1950	123	68.0	100.0	...	...	...	b	22.3	22.3	...	53.6	19.6	4.4
1955	281	67.8	100.0	...	...	...	b	36.6	36.6	...	38.7	18.1	6.6
1960	351	65.2	100.0	27.1	13.3	8.1	b	18.4	17.4	1.0	22.2	8.2	2.7
1965	440	65.3	100.0	32.6	12.1	6.0	b	19.9	16.9	3.0	17.4	6.7	5.4
1970	524	63.9	100.0	35.8	14.3	7.2	b	31.3	25.7	5.5	9.2	1.7	0.6
1975	603	63.7	100.0	41.6	13.7	7.0	b	29.3	22.0	7.3	6.8	1.2	0.4
1980	671	63.5	100.0	45.9	11.5	6.5	b	29.9	22.1	7.7	5.0	0.9	0.2
1985	697	63.4	100.0	57.9	7.4	9.8	b	21.3	12.2	9.1	2.6	0.8	0.2
1986	713	63.4	100.0	57.5	7.0	10.4	b	21.6	12.6	8.9	2.5	0.9	0.2
1987	681	63.3	100.0	58.9	7.2	9.6	b	20.8	11.8	9.0	2.6	0.7	0.2
1988	667	63.3	100.0	59.4	6.9	7.9	b	21.8	12.8	9.0	3.1	0.7	0.2
1989	674	63.4	100.0	57.9	6.5	9.4	b	21.6	12.8	8.8	3.3	1.0	0.3
1990	679	63.5	100.0	55.9	7.2	9.8	b	21.5	12.7	8.9	4.1	1.0	0.5
1991	685	63.5	100.0	56.1	7.1	9.5	b	22.3	13.9	8.4	3.8	0.9	0.3
1992	708	63.5	100.0	56.7	6.9	9.8	b	21.5	12.5	9.0	3.7	1.1	0.3
1993	704	63.5	100.0	56.0	6.8	10.2	b	22.4	13.6	8.8	3.1	1.1	0.3
1994	690	63.4	100.0	57.6	6.7	10.2	b	21.0	11.8	9.1	3.3	1.0	0.3
1995	684	63.5	100.0	55.4	6.6	10.1	b	22.6	12.8	9.7	3.5	1.4	0.4
1996	684	63.4	100.0	57.4	5.9	9.4	b	22.7	12.5	10.2	3.4	1.0	0.3
1997	809	65.4	100.0	48.2	5.5	7.5	b	19.5	10.5	8.9	4.4	6.4	8.5
1998	733	64.0	100.0	53.1	7.0	8.9	b	22.0	12.4	9.6	4.1	2.4	2.5
1999	737	63.6	100.0	55.1	6.8	9.2	b	22.6	12.5	10.1	3.8	1.8	0.7
2000	854	63.8	100.0	52.2	5.9	9.3	b	23.6	13.9	9.7	6.5	2.2	0.4
2001	795	63.7	100.0	51.3	7.1	11.5	b	23.7	12.8	10.9	3.1	2.6	0.6
2002	811	63.6	100.0	52.9	6.6	12.2	b	23.9	12.7	11.2	2.3	1.8	0.3
2003	822	63.6	100.0	53.5	6.7	10.6	b	23.8	13.5	10.3	2.7	2.2	0.5
2004	874	63.6	100.0	54.1	7.0	9.3	b	24.3	14.3	10.0	3.1	1.9	0.4
2005	939	63.7	100.0	53.3	7.3	8.7	b	25.0	15.3	9.7	3.3	2.1	0.4
2006	942	63.4	100.0	50.2	7.5	9.4	b	27.4	16.9	10.5	3.2	2.0	0.4
2007	961	63.5	100.0	47.6	7.3	10.0	b	30.1	18.9	11.2	3.1	1.6	0.2
2008	1,079	63.6	100.0	48.3	6.9	9.0	b	30.7	19.5	11.2	2.9	1.5	0.7
2009	1,288	63.7	100.0	49.8	6.5	7.2	11.2	21.2	9.7	11.5	2.2	1.5	0.5

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1985–2001 are based on a 1 percent sample. All other years are 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

Beginning with 1997, includes conversions from nondisabled widow(er)s benefits to higher retired-worker benefits.

Beginning with 2006, age is based on date of entitlement and not date of award. Entitlement can be retroactive and thus precede the date of award.

... = not applicable.

a. Age in year of award for 1940–1980. Age in month of award for 1985 and later.

b. Through 2008, FRA was 65; beginning in 2009, FRA is 66.

c. Because of the increase in FRA from 65 to 66, this group comprises beneficiaries aged 67–69 beginning in 2009.

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6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C1—Number and percentage distribution, by monthly benefit and sex, 2009

Monthly benefit (dollars)	Total		Men		Women	
	Number	Percent	Number	Percent	Number	Percent
All disabled workers	970,696	100.0	521,424	100.0	449,272	100.0
Less than 100.00	4,004	0.4	2,137	0.4	1,867	0.4
100.00–149.90	2,113	0.2	1,024	0.2	1,089	0.2
150.00–199.90	4,332	0.4	1,535	0.3	2,797	0.6
200.00–249.90	8,203	0.8	3,007	0.6	5,196	1.2
250.00–299.90	11,839	1.2	4,434	0.9	7,405	1.6
300.00–349.90	13,530	1.4	5,077	1.0	8,453	1.9
350.00–399.90	14,796	1.5	5,465	1.0	9,331	2.1
400.00–449.90	16,323	1.7	6,035	1.2	10,288	2.3
450.00–499.90	16,732	1.7	6,090	1.2	10,642	2.4
500.00–549.90	17,194	1.8	6,251	1.2	10,943	2.4
550.00–599.90	17,990	1.9	6,763	1.3	11,227	2.5
600.00–649.90	18,997	2.0	7,157	1.4	11,840	2.6
650.00–699.90	37,713	3.9	13,769	2.6	23,944	5.3
700.00–749.90	47,053	4.8	17,659	3.4	29,394	6.5
750.00–799.90	47,113	4.9	18,492	3.5	28,621	6.4
800.00–849.90	45,599	4.7	18,680	3.6	26,919	6.0
850.00–899.90	44,468	4.6	19,161	3.7	25,307	5.6
900.00–949.90	42,696	4.4	19,505	3.7	23,191	5.2
950.00–999.90	41,411	4.3	19,750	3.8	21,661	4.8
1,000.00–1,049.90	39,426	4.1	19,684	3.8	19,742	4.4
1,050.00–1,099.90	36,785	3.8	19,060	3.7	17,725	3.9
1,100.00–1,149.90	35,108	3.6	18,942	3.6	16,166	3.6
1,150.00–1,199.90	32,780	3.4	18,251	3.5	14,529	3.2
1,200.00–1,249.90	30,926	3.2	17,801	3.4	13,125	2.9
1,250.00–1,299.90	28,502	2.9	17,110	3.3	11,392	2.5
1,300.00–1,349.90	27,069	2.8	16,844	3.2	10,225	2.3
1,350.00–1,399.90	24,680	2.5	15,643	3.0	9,037	2.0
1,400.00–1,449.90	23,102	2.4	15,255	2.9	7,847	1.7
1,450.00–1,499.90	20,937	2.2	14,064	2.7	6,873	1.5
1,500.00–1,549.90	19,431	2.0	13,330	2.6	6,101	1.4
1,550.00–1,599.90	17,969	1.9	12,497	2.4	5,472	1.2
1,600.00–1,649.90	16,490	1.7	11,677	2.2	4,813	1.1
1,650.00–1,699.90	15,351	1.6	11,148	2.1	4,203	0.9
1,700.00–1,749.90	14,120	1.5	10,328	2.0	3,792	0.8
1,750.00–1,799.90	13,230	1.4	9,750	1.9	3,480	0.8
1,800.00–1,849.90	13,136	1.4	9,791	1.9	3,345	0.7
1,850.00–1,899.90	16,951	1.7	12,745	2.4	4,206	0.9
1,900.00–1,949.90	18,494	1.9	14,241	2.7	4,253	0.9
1,950.00–1,999.90	15,028	1.5	11,864	2.3	3,164	0.7
2,000.00–2,049.90	12,799	1.3	10,252	2.0	2,547	0.6
2,050.00–2,099.90	10,504	1.1	8,632	1.7	1,872	0.4
2,100.00 or more	35,772	3.7	30,524	5.9	5,248	1.2
Average benefit (dollars)	1,119.90		1,255.00		963.10	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

Benefits awarded before the December cost-of-living increase are converted to the December rates before percentages are computed.

Effective 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

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6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C2—Number, average age, and percentage distribution, by sex and age, selected years 1957–2009

Year	Number	Average age	Percentage distribution, by age									
			Total, all ages	Under 30	30–39	40–44	45–49	50–54	55–59	60–61	62–64	65 ^a
<i>Men</i>												
1957	148,376	59.2	100.0	...	...	...	...	17.1	28.0	17.0	33.8	4.1
1958	107,003	59.0	100.0	...	...	...	...	19.7	27.5	15.2	28.9	8.7
1959	146,547	58.9	100.0	...	...	...	...	21.1	27.4	14.8	28.8	7.8
1960	168,466	54.5	100.0	0.8	7.0	6.5	10.5	16.7	20.0	11.8	21.3	5.4
1965	186,808	53.0	100.0	1.8	8.2	7.9	11.1	17.1	25.7	14.0	13.0	1.0
1970	258,072	52.1	100.0	6.7	7.6	6.5	10.1	14.7	23.5	12.3	16.1	2.6
1975	408,531	51.5	100.0	7.7	8.6	6.2	9.5	15.7	23.1	12.1	14.6	2.5
1980	275,185	51.2	100.0	8.3	9.7	6.0	8.4	14.7	24.6	12.3	14.2	1.8
1981	244,984	50.8	100.0	8.6	10.2	6.2	8.4	14.5	24.3	13.0	13.1	1.7
1982	207,453	50.9	100.0	8.4	10.4	6.3	8.4	14.1	24.6	12.9	13.6	1.2
1983	217,422	50.2	100.0	9.5	11.7	6.6	8.4	13.6	23.4	12.2	13.3	1.3
1984	247,833	50.0	100.0	9.2	12.8	7.1	8.7	13.4	22.6	12.2	12.7	1.3
1985	274,400	50.1	100.0	8.7	13.3	7.0	9.9	14.6	23.1	12.4	10.6	0.3
1986	273,700	48.7	100.0	10.7	15.3	8.1	9.4	14.3	21.3	11.1	9.5	0.3
1987	265,900	49.0	100.0	9.4	16.0	8.6	9.3	13.9	20.8	10.9	11.0	0.2
1988	265,700	49.2	100.0	8.4	16.0	9.7	9.0	14.6	21.3	10.5	10.2	0.2
1989	268,600	49.0	100.0	8.7	16.0	9.5	10.2	14.2	20.6	9.7	10.8	0.3
1990	293,300	48.1	100.0	10.9	16.9	9.4	9.5	13.5	20.5	10.3	8.8	0.1
1991	322,700	47.9	100.0	9.5	17.7	10.6	11.0	14.1	18.4	9.4	9.1	0.2
1992	395,600	47.8	100.0	9.5	18.5	10.8	11.0	13.0	18.6	9.8	8.7	0.2
1993	391,800	47.7	100.0	9.2	18.9	10.1	11.7	14.7	18.8	8.6	7.8	0.2
1994	379,300	48.4	100.0	6.8	18.4	10.8	12.7	15.4	19.3	9.0	7.6	0.1
1995	368,400	48.9	100.0	7.2	16.3	10.7	11.5	15.7	20.4	8.9	9.1	0.2
1996	347,100	48.7	100.0	6.9	16.2	10.8	13.2	16.2	19.9	9.3	7.5	0.1
1997	311,100	49.3	100.0	6.3	14.6	10.8	13.5	16.1	21.6	8.8	8.2	0.1
1998	331,400	49.2	100.0	6.3	14.3	11.1	12.4	18.3	21.6	8.1	7.8	0.2
1999	338,900	49.6	100.0	6.2	13.1	11.4	12.4	18.3	21.7	8.8	8.0	0.3
2000	329,800	49.6	100.0	6.8	12.9	10.7	12.7	17.7	21.0	9.1	8.8	0.2
2001	364,500	49.4	100.0	7.5	13.2	9.9	12.2	17.4	22.6	9.2	7.9	0.1
2002	406,336	49.4	100.0	7.8	12.0	10.3	12.7	17.5	22.5	9.2	7.9	0.1
2003	421,598	49.7	100.0	7.0	11.8	10.2	12.8	17.6	22.8	9.6	7.9	0.3
2004	428,672	50.0	100.0	6.8	11.3	9.9	12.8	17.6	23.4	9.6	8.2	0.4
2005	444,312	50.2	100.0	6.6	10.8	9.8	13.0	17.8	23.5	8.8	8.9	0.7
2006	425,285	48.4	100.0	8.2	11.2	10.1	13.1	18.2	23.6	8.4	6.8	0.4
2007	428,836	49.1	100.0	8.2	10.7	9.7	12.8	18.3	23.7	8.9	7.2	0.5
2008	466,966	49.2	100.0	8.4	10.3	9.3	12.7	18.6	23.4	9.5	7.0	0.7
2009	521,424	49.2	100.0	8.5	10.3	8.9	12.5	19.1	23.6	9.3	7.0	0.7

(Continued)

6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C2—Number, average age, and percentage distribution, by sex and age, selected years 1957–2009—Continued

Year	Number	Average age	Percentage distribution, by age									
			Total, all ages	Under 30	30–39	40–44	45–49	50–54	55–59	60–61	62–64	65 ^a
<i>Women</i>												
1957	30,426	57.4	100.0	...	...	...	...	25.5	38.9	19.8	15.3	0.5
1958	24,379	57.2	100.0	...	...	...	...	28.6	37.2	17.8	15.2	1.2
1959	31,264	57.0	100.0	...	...	...	...	30.2	36.9	17.6	14.2	1.1
1960	39,339	52.5	100.0	0.7	8.1	8.0	13.3	21.9	24.6	12.4	10.1	0.8
1965	66,691	53.2	100.0	1.1	6.5	7.4	11.7	19.3	28.3	14.1	10.9	0.6
1970	92,312	52.8	100.0	4.2	6.3	6.1	11.0	17.5	27.2	13.0	12.9	1.7
1975	183,518	52.1	100.0	6.1	7.3	6.1	10.1	17.7	25.5	12.2	12.9	2.1
1980	121,374	51.1	100.0	7.4	9.7	6.4	9.3	16.3	25.5	11.7	12.2	1.5
1981	106,863	50.8	100.0	7.8	10.2	6.5	9.5	16.4	25.1	12.0	11.1	1.4
1982	89,678	50.5	100.0	8.0	10.9	6.8	9.5	15.6	24.9	11.7	11.4	1.1
1983	94,127	49.8	100.0	9.0	12.2	7.4	9.5	14.8	23.5	10.9	11.6	1.1
1984	114,165	49.7	100.0	8.3	13.2	7.9	9.7	14.9	22.8	10.9	11.7	1.2
1985	134,500	49.7	100.0	8.6	12.9	8.0	10.6	15.8	23.3	10.1	10.5	0.1
1986	135,700	48.8	100.0	9.0	15.5	10.4	10.5	14.8	21.3	9.6	8.6	0.2
1987	143,700	49.5	100.0	7.5	15.2	8.1	11.2	15.8	23.4	9.6	8.8	0.3
1988	147,000	49.3	100.0	8.5	14.0	8.8	10.9	16.1	23.5	10.5	7.4	0.3
1989	146,900	49.1	100.0	7.8	14.8	10.4	11.9	13.8	21.2	10.8	8.9	0.3
1990	168,500	48.4	100.0	8.5	16.3	9.8	13.1	14.2	22.3	8.9	6.5	0.4
1991	190,400	48.4	100.0	8.5	16.8	10.1	12.2	16.2	19.5	8.9	7.4	0.4
1992	241,300	47.7	100.0	8.6	17.7	12.0	12.4	15.6	17.6	8.4	7.5	0.2
1993	237,900	48.1	100.0	7.5	17.5	11.2	13.1	16.5	19.7	6.8	7.4	0.2
1994	234,000	48.2	100.0	7.4	16.9	11.1	12.9	17.0	20.8	7.3	6.4	0.2
1995	263,200	48.5	100.0	6.4	16.7	11.4	13.8	17.2	20.5	7.6	6.3	0.1
1996	256,900	49.1	100.0	5.3	15.1	11.3	14.0	19.0	21.2	8.3	5.8	0.1
1997	250,200	48.4	100.0	6.2	16.3	12.2	14.1	19.0	19.0	6.8	6.2	0.2
1998	271,900	48.9	100.0	5.4	14.9	12.2	14.5	19.1	20.4	7.6	5.7	0.2
1999	266,900	48.7	100.0	5.7	14.6	12.5	15.3	18.2	20.6	6.6	6.2	0.3
2000	282,400	49.2	100.0	5.8	13.7	12.3	13.5	18.7	21.6	8.1	6.1	0.2
2001	304,800	48.4	100.0	7.9	14.0	12.1	13.8	18.5	20.1	7.6	5.9	0.1
2002	343,667	48.7	100.0	7.3	13.4	11.6	14.3	18.4	21.0	7.7	6.3	0.1
2003	355,863	49.0	100.0	6.8	13.2	11.4	14.2	18.4	21.5	8.0	6.3	0.2
2004	367,103	49.7	100.0	6.5	12.6	11.1	14.1	18.5	21.9	8.1	6.7	0.4
2005	385,375	49.6	100.0	6.2	12.2	10.9	14.1	18.9	22.2	7.6	7.4	0.5
2006	373,390	48.1	100.0	7.6	12.9	11.4	14.6	19.2	21.8	7.1	5.2	0.3
2007	375,951	48.4	100.0	7.5	12.3	11.1	14.4	19.4	22.0	7.4	5.6	0.3
2008	410,260	48.4	100.0	7.6	12.2	10.7	14.2	19.9	21.7	7.8	5.4	0.5
2009	449,272	48.4	100.0	7.8	12.1	10.3	14.3	20.4	21.8	7.7	5.3	0.4

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1985–2001 are based on a 1 percent sample. All other years are 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

Beginning with 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

Age in year of award for 1957–1984. Age in month of award for 1985 and later. Beginning with 2006, age is based on date of entitlement and not date of award. Entitlement can be retroactive and thus precede the date of award.

... = not applicable.

a. Includes awards processed after attainment of age 65.

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6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C7—Number of applications, awards, ratio of awards to applications, and awards per 1,000 insured workers, 1965–2009

Year	Number (thousands)		Awards as a percentage of applications ^a	Awards per 1,000 insured workers ^b
	Applications	Awards ^a		
1965	529.3	253.5	47.9	4.7
1966	544.5	278.3	51.1	5.1
1967	573.2	301.4	52.6	5.4
1968	719.8	323.2	44.9	5.7
1969	725.2	344.7	47.5	4.9
1970	869.8	350.4	40.3	4.8
1971	923.9	415.9	45.0	5.5
1972	947.5	455.4	48.1	5.9
1973	1,067.5	491.6	46.1	6.2
1974	1,330.2	536.0	40.3	6.6
1975	1,285.3	592.0	46.1	7.0
1976	1,232.2	551.5	44.8	6.4
1977	1,235.2	568.9	46.1	6.5
1978	1,184.7	490.8	41.4	5.5
1979	1,187.8	440.5	37.1	4.7
1980	1,262.3	420.3	33.3	4.3
1981	1,161.2	381.0	32.8	3.8
1982	1,019.8	336.1	33.0	3.3
1983	1,019.3	428.5	42.0	4.1
1984	1,036.7	410.0	39.5	3.9
1985	1,066.2	416.1	39.0	3.9
1986	1,118.4	424.9	38.0	3.9
1987	1,108.9	420.3	37.9	3.8
1988	1,017.9	415.3	40.8	3.7
1989	984.9	430.7	43.7	3.7
1990	1,067.7	472.1	44.2	4.0
1991	1,208.7	540.8	44.7	4.5
1992	1,335.1	642.1	48.1	5.3
1993	1,425.8	637.4	44.7	5.2
1994	1,443.8	631.9	43.8	5.1
1995	1,338.1	645.6	48.3	5.2
1996	1,279.2	624.3	48.8	4.9
1997	1,180.2	587.7	49.8	4.6
1998	1,169.3	608.4	52.0	4.6
1999	1,200.1	620.6	51.7	4.7
2000	1,330.6	621.3	46.7	4.6
2001	1,498.6	690.5	46.1	5.0
2002	1,682.5	750.0	44.6	5.4
2003	1,895.5	777.5	41.0	5.5
2004	2,137.5	795.8	37.2	5.6
2005	2,122.1	829.7	39.1	5.8
2006	2,134.1	803.8	37.7	5.5
2007	2,190.2	818.5	37.4	5.6
2008	2,320.4	890.4	38.4	6.0
2009	2,816.2	984.5	35.0	6.6

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

a. Data for 1978–1993 are revised.

b. Figures are subject to revision.

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6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D1—Number of wives and husbands, by type of benefit, selected years 1950–2009

Year	Total	Wives with entitlement based on—		Husbands
		Care of children	Age	
<i>Wives and husbands of retired workers</i>				
1950	162,768	9,646	152,310	812
1955	288,915	21,692	263,816	3,407
1960	339,987	32,254	305,713	2,020
1965	321,015	44,087	275,717	1,211
1970	339,447	51,378	286,867	1,202
1975	350,558	60,184	289,600	774
1980	360,693	55,401	294,892	10,400
1981	338,540	50,993	277,641	9,906
1982	349,967	36,229	302,739	10,999
1983	356,274	35,309	308,922	12,043
1984	342,691	30,972	298,855	12,864
1985	356,558	30,454	312,849	13,255
1986	358,115	28,925	315,427	13,763
1987	333,333	26,099	294,499	12,735
1988	316,929	23,045	281,760	12,124
1989	310,498	21,285	278,655	10,558
1990	308,980	21,395	277,238	10,347
1991	307,000	21,154	276,236	9,610
1992	304,764	21,057	274,670	9,037
1993	290,728	19,945	262,240	8,543
1994	275,025	18,431	248,430	8,164
1995	258,740	17,214	233,731	7,795
1996	244,014	15,466	221,059	7,489
1997	268,012	14,040	246,229	7,743
1998	263,668	13,472	242,390	7,806
1999	275,568	13,521	253,559	8,488
2000	341,503	15,625	315,148	10,730
2001	314,547	13,743	289,757	11,047
2002	317,685	14,011	291,377	12,297
2003	305,831	12,832	280,883	12,116
2004	319,430	12,219	294,133	13,078
2005	329,225	11,630	303,976	13,619
2006	328,430	11,160	301,614	15,656
2007	316,782	10,471	291,985	14,326
2008	344,003	11,283	316,119	16,601
2009	375,123	12,530	343,296	19,297

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D1—Number of wives and husbands, by type of benefit, selected years 1950–2009—Continued

Year	Total	Wives with entitlement based on—		Husbands
		Care of children	Age	
<i>Wives and husbands of disabled workers</i>				
1958 ^a	12,920	7,869	5,035	16
1959 ^b	54,299	32,844	21,301	154
1960	54,187	38,326	15,756	105
1965	69,183	55,230	13,813	140
1970	96,304	74,913	21,227	164
1975	148,741	116,624	31,942	175
1980	108,500	74,922	32,616	962
1981	95,575	64,333	30,360	882
1982	77,835	45,463	31,540	832
1983	80,079	43,820	35,369	890
1984	81,834	46,433	34,470	931
1985	83,511	48,522	34,101	888
1986	82,435	47,711	33,797	927
1987	77,316	43,881	31,652	1,783
1988	73,790	41,627	29,634	2,529
1989	69,113	39,212	27,750	2,151
1990	69,667	40,458	27,023	2,186
1991	72,754	43,543	26,747	2,464
1992	78,083	47,841	27,502	2,740
1993	74,605	45,602	26,276	2,727
1994	69,549	42,824	24,240	2,485
1995	63,097	37,972	22,833	2,292
1996	57,528	33,638	21,775	2,115
1997	50,818	25,779	23,329	1,710
1998	47,550	23,190	22,693	1,667
1999	46,164	21,949	22,557	1,658
2000	43,941	19,801	22,399	1,741
2001	43,412	19,535	21,979	1,898
2002	45,600	20,621	22,863	2,116
2003	47,183	20,580	24,269	2,334
2004	48,016	19,423	26,070	2,523
2005	50,187	18,877	28,679	2,631
2006	49,521	16,837	30,270	2,414
2007	47,583	15,529	29,539	2,515
2008	50,756	15,899	32,033	2,824
2009	54,112	16,963	33,980	3,169

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Benefits not necessarily payable at time of award.

Beginning with 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

a. January–November.

b. Includes December 1958.

CONTACT: Jennie H. Park (410) 965-9358 or supplement@ssa.gov.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D3—Number and average monthly benefit for wives and husbands, by basis of entitlement, age, and sex, 2009

Basis of entitlement and age	Wives						Husbands	
	Total		Of retired workers		Of disabled workers			
	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)
All wives and husbands	406,769	410.50	355,826	426.70	50,943	297.20	22,466	313.20
By age								
By basis of entitlement								
Care of children	29,493	334.00	12,530	496.90	16,963	213.70	1,133	186.20
Under 35	6,559	189.70	851	415.30	5,708	156.10	237	124.20
35–39	4,272	243.30	903	427.50	3,369	194.00	211	148.50
40–44	4,639	309.70	1,508	471.70	3,131	231.70	207	180.50
45–49	4,776	375.30	2,274	500.80	2,502	261.20	210	185.20
50–54	3,976	442.10	2,534	525.00	1,442	296.40	131	232.40
55–59	2,714	499.20	2,149	541.00	565	340.30	80	303.10
60–61	1,228	550.70	1,094	576.90	134	336.60	31	361.80
62–64	1,329	413.10	1,217	421.10	112	325.60	26	307.80
Age	377,276	416.50	343,296	424.20	33,980	339.00	21,333	320.00
62–64	261,652	388.80	231,491	396.40	30,161	330.30	7,194	269.10
62	167,480	372.80	142,445	381.80	25,035	321.60	3,269	232.00
63	41,445	374.40	38,755	377.00	2,690	336.70	1,404	247.10
64	52,727	450.80	50,291	452.70	2,436	412.20	2,521	329.30
65–69	102,880	490.70	99,591	493.40	3,289	409.70	9,403	375.70
65	45,086	453.80	43,512	455.90	1,574	396.90	2,762	339.70
66	38,144	558.40	37,178	561.60	966	434.70	3,121	447.00
67	9,461	462.00	9,120	463.80	341	413.30	1,406	355.30
68	5,929	431.60	5,684	433.30	245	390.90	1,168	333.70
69	4,260	421.70	4,097	422.40	163	405.40	946	327.50
70–74	9,477	384.90	9,044	384.60	433	390.80	3,001	287.00
75 or older	3,267	391.10	3,170	390.60	97	404.90	1,735	285.90
By sex								
Wives								
Not divorced	358,642	412.20	311,904	429.80	46,738	295.10	...	...
Divorced	48,127	397.80	43,922	405.10	4,205	321.40	...	...
Husbands of—								
Retired workers	...	...	...	...	...	...	19,297	327.80
Disabled workers	...	...	...	...	...	...	3,169	224.20

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Effective 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

Effective 2006, age is based on date of entitlement and not date of award. Entitlement can be retroactive and thus precede the date of award.

... = not applicable.

a. Benefits awarded before the December cost-of-living increase are converted to the December rates before averages are computed.

CONTACT: Jennie H. Park (410) 965-9358 or supplement@ssa.gov.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2009

Year	All children	Children of—		
		Retired workers	Deceased workers	Disabled workers
		<i>Total</i>		
1957	313,163	81,842	231,321	...
1960	415,719	69,979	241,430	104,310
1965	783,202	134,187	451,399	197,616
1970	1,090,865	182,595	591,724	316,546
1975	1,331,913	225,579	591,118	515,216
1976	1,327,197	236,805	578,905	511,487
1977	1,365,513	259,447	587,589	518,477
1978	1,234,658	214,284	566,992	453,382
1979	1,191,521	247,800	544,549	399,172
1980	1,174,112	248,658	540,246	385,208
1981	1,086,547	211,406	535,487	339,654
1982	916,715	182,849	473,396	260,470
1983	752,839	144,945	380,992	226,895
1984	721,564	131,986	351,326	238,252
1985	713,632	128,076	332,531	253,025
1986	700,627	122,652	319,800	258,167
1987	685,299	117,984	310,573	256,742
1988	706,031	116,659	324,346	265,026
1989	675,362	106,491	307,484	261,387
1990	695,307	108,105	303,616	283,586
1991	726,908	107,261	301,459	318,188
1992	794,571	108,686	304,300	381,585
1993	816,454	106,566	311,290	398,598
1994	824,239	102,983	310,051	411,205
1995	808,578	101,239	306,044	401,295
1996	798,485	98,655	302,480	397,350
1997	757,346	97,594	297,204	362,548
1998	763,170	96,893	294,851	371,426
1999	773,166	99,826	295,196	378,144
2000	776,676	115,358	297,686	363,632
2001	796,174	110,680	302,445	383,049
2002	846,361	116,186	310,395	419,780
2003	852,354	111,992	305,409	434,953
2004	858,562	115,391	309,472	433,699
2005	907,547	123,494	314,786	469,267
2006	897,035	126,860	321,155	449,020
2007	902,296	126,678	322,326	453,292
2008	960,873	140,581	329,397	490,895
2009	1,007,671	156,412	319,127	532,132

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2009—Continued

Year	All children	Children of—		
		Retired workers	Deceased workers	Disabled workers
<i>Children under age 18</i>				
1940	59,382	8,249	51,133	...
1945	127,514	7,215	120,299	...
1950	122,641	25,495	97,146	...
1955	238,795	40,402	198,393	...
1960	391,366	57,239	231,611	102,516
1965	523,453	84,707	263,637	175,109
1970	678,940	99,353	337,960	241,627
1975	806,770	115,347	300,139	391,284
1980	573,828	111,610	227,139	235,079
1981	512,939	84,793	228,317	199,829
1982	457,445	81,502	222,738	153,205
1983	444,467	80,117	211,396	152,954
1984	449,242	74,328	202,163	172,721
1985	464,908	74,128	200,576	190,204
1986	465,115	70,915	196,008	198,192
1987	451,370	66,672	184,668	195,030
1988	452,519	63,586	192,278	196,655
1989	446,308	59,073	189,285	197,950
1990	468,439	60,588	189,792	218,059
1991	502,442	60,618	191,537	250,287
1992	559,725	61,034	192,689	306,002
1993	575,247	59,515	198,469	317,263
1994	586,342	57,677	201,598	327,067
1995	571,650	57,215	198,848	315,587
1996	561,687	56,126	194,333	311,228
1997	517,118	54,841	184,237	278,040
1998	516,100	54,218	182,118	279,764
1999	522,946	57,019	182,159	283,768
2000	525,390	68,440	184,762	272,188
2001	542,147	64,207	188,300	289,640
2002	578,906	66,992	192,226	319,688
2003	580,166	63,793	187,060	329,313
2004	578,844	65,490	188,435	324,919
2005	609,993	69,008	189,509	351,476
2006	585,334	69,819	189,654	325,861
2007	573,067	65,783	184,922	322,362
2008	605,931	73,528	183,754	348,649
2009	645,853	84,590	179,477	381,786

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2009—Continued

Year	All children	Children of—		
		Retired workers	Deceased workers	Disabled workers
<i>Disabled adult children</i>				
1957	29,507	17,249	12,258	...
1960	24,353	12,740	9,819	1,794
1965	21,398	10,017	8,668	2,713
1970	24,547	11,348	9,425	3,774
1975	32,707	14,636	11,182	6,889
1976	34,517	15,602	11,546	7,369
1977	36,210	--	--	7,885
1978	33,611	15,378	11,013	7,220
1979	33,419	15,967	10,999	6,453
1980	33,470	16,650	10,626	6,194
1981	30,545	15,365	9,745	5,435
1982	28,707	14,772	9,685	4,250
1983	33,639	17,309	11,223	5,107
1984	36,427	18,330	12,556	5,541
1985	39,083	19,661	12,709	6,713
1986	40,525	20,295	13,244	6,986
1987	39,665	20,761	12,117	6,787
1988	38,702	20,544	11,512	6,646
1989	37,001	19,668	10,975	6,358
1990	38,772	20,862	11,277	6,633
1991	41,086	21,850	11,684	7,552
1992	47,009	23,615	13,846	9,548
1993	47,246	23,173	13,819	10,254
1994	44,483	22,119	12,590	9,774
1995	43,275	21,566	11,930	9,779
1996	40,583	20,169	11,061	9,353
1997	38,701	19,611	10,616	8,474
1998	39,941	19,932	10,914	9,095
1999	41,748	20,467	11,430	9,851
2000	43,845	22,567	11,621	9,657
2001	43,042	21,307	11,872	9,863
2002	46,636	22,881	12,685	11,070
2003	47,235	22,024	12,920	12,291
2004	48,772	22,531	13,999	12,242
2005	53,807	25,154	14,982	13,671
2006	58,519	25,679	17,467	15,373
2007	67,517	28,359	20,368	18,790
2008	79,694	32,712	24,369	22,613
2009	79,769	35,734	22,821	21,214

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2009—Continued

Year	All children	Children of—		
		Retired workers	Deceased workers	Disabled workers
		<i>Students</i>		
1965	238,351	39,463	179,094	19,794
1970	387,378	71,894	244,339	71,145
1975	492,436	95,596	279,797	117,043
1976	544,739	108,197	295,058	141,484
1977	574,760	--	--	148,227
1978	544,396	105,719	291,434	147,243
1979	553,889	117,118	292,766	144,005
1980	566,814	120,398	302,481	143,935
1981	543,063	111,248	297,425	134,390
1982	430,563	86,575	240,973	103,015
1983	274,726	47,519	158,373	68,834
1984	235,895	39,328	136,577	59,990
1985	209,641	34,287	119,246	56,108
1986	194,987	31,442	110,556	52,989
1987	194,264	30,551	108,788	54,925
1988	214,810	32,529	120,556	61,725
1989	192,053	27,750	107,224	57,079
1990	188,096	26,655	102,547	58,894
1991	183,380	24,793	98,238	60,349
1992	187,837	24,037	97,765	66,035
1993	193,961	23,878	99,002	71,081
1994	193,414	23,187	95,863	74,364
1995	193,653	22,458	95,266	75,929
1996	196,215	22,360	97,086	76,769
1997	201,527	23,142	102,351	76,034
1998	207,129	22,743	101,819	82,567
1999	208,472	22,340	101,607	84,525
2000	207,441	24,351	101,303	81,787
2001	210,985	25,166	102,273	83,546
2002	220,819	26,313	105,484	89,022
2003	224,953	26,175	105,429	93,349
2004	230,946	27,370	107,038	96,538
2005	243,747	29,332	110,295	104,120
2006	253,182	31,362	114,034	107,786
2007	261,712	32,536	117,036	112,140
2008	275,248	34,341	121,274	119,633
2009	282,049	36,088	116,829	129,132

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Beginning with 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

. . . = not applicable; -- = not available.

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6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D5—Number and average monthly benefit for children, by type of benefit and age, 2009

Age	Total children		Children of—						
			Retired workers		Deceased workers		Disabled workers		
	Total number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)	
All children									
Total	1,007,671	474.70	156,412	542.50	319,127	745.70	532,132	292.30	
Children under age 18									
Subtotal	645,853	421.30	84,590	536.50	179,477	718.20	381,786	256.20	
Under 1	47,910	290.90	2,404	458.80	9,076	638.50	36,430	193.20	
1	21,681	345.00	1,271	484.00	6,502	641.50	13,908	193.70	
2	22,368	354.10	1,539	475.90	6,739	651.30	14,090	198.60	
3	23,957	362.30	1,844	470.60	7,209	658.80	14,904	205.60	
4	25,394	366.60	2,012	476.30	7,636	663.00	15,746	208.80	
5	26,976	376.70	2,391	479.80	8,053	678.30	16,532	214.80	
6	28,657	384.40	2,587	477.20	8,624	687.10	17,446	221.00	
7	31,008	388.10	2,979	478.50	9,213	689.10	18,816	226.40	
8	32,864	394.30	3,343	479.40	9,689	698.50	19,832	231.30	
9	35,454	407.40	3,861	499.60	10,351	712.30	21,242	242.00	
10	37,437	415.40	4,380	504.60	10,645	725.30	22,412	250.70	
11	39,705	423.20	4,972	508.00	11,163	723.60	23,570	263.00	
12	42,345	435.60	5,917	518.90	11,627	736.90	24,801	274.50	
13	45,169	447.00	6,676	524.70	12,125	745.10	26,368	290.30	
14	48,137	465.60	7,779	542.90	13,057	755.70	27,301	304.80	
15	50,125	489.10	9,099	560.80	13,535	774.40	27,491	324.90	
16	48,708	517.60	10,610	596.80	13,550	778.80	24,548	339.20	
17	37,958	554.60	10,926	622.60	10,683	800.60	16,349	348.50	
Disabled adult children									
Subtotal	79,769	487.90	35,734	476.90	22,821	656.30	21,214	325.20	
Under 20	25,950	469.80	5,191	477.80	10,002	661.80	10,757	287.40	
20–24	14,437	493.50	4,779	501.80	4,646	660.50	5,012	330.90	
25–29	11,094	513.20	5,947	504.50	2,580	660.90	2,567	384.90	
30–34	10,454	505.60	6,861	483.90	1,974	656.20	1,619	414.10	
35–39	9,952	492.40	7,427	469.80	1,583	660.30	942	388.80	
40 or older	7,882	472.60	5,529	426.00	2,036	611.40	317	394.20	
Students aged 18–19									
Subtotal	282,049	593.30	36,088	621.30	116,829	805.50	129,132	393.40	
18	281,621	593.40	35,977	621.40	116,704	805.60	128,940	393.50	
19	428	520.00	111	597.50	125	715.60	192	347.90	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Effective 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

Effective 2006, age is based on date of entitlement and not date of award. Entitlement can be retroactive and thus precede the date of award.

a. Benefits awarded before the December cost-of-living increase are converted to the December rates before averages are computed.

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6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D6—Number of mothers and fathers, by type of benefit, 1950–2009

Year	Total	Mothers	Fathers	Widowed			Surviving divorced mothers and fathers
				Subtotal	With at least 1 child under age 16 ^a	Entitled solely because of at least 1 disabled child ^b	
1950	41,101	41,101	...	41,089	41,089	...	12
1951	78,323	78,323	...	78,181	78,181	...	142
1952	64,875	64,875	...	64,776	64,776	...	99
1953	71,945	71,945	...	71,861	71,861	...	84
1954	70,775	70,775	...	70,699	70,699	...	76
1955	76,018	76,018	...	75,927	75,927	...	91
1956	67,475	67,475	...	67,410	67,410	...	65
1957	88,174	88,174	...	88,102	86,088	2,014	72
1958 ^c	81,467	81,467	...	81,392	80,130	1,262	75
1959 ^d	102,020	102,020	...	101,933	100,234	1,699	87
1960	92,607	92,607	...	92,507	90,939	1,568	100
1961	98,449	98,449	...	98,374	96,778	1,596	75
1962	99,925	99,925	...	99,835	98,099	1,736	90
1963	104,960	104,960	...	104,866	102,828	2,038	94
1964	106,249	106,249	...	106,137	103,778	2,359	112
1965	100,005	100,005	...	99,804	97,972	1,832	201
1966	107,135	107,135	...	106,677	105,270	1,407	458
1967	110,762	110,762	...	110,283	108,842	1,441	479
1968	113,765	113,765	...	113,323	111,869	1,454	442
1969	116,922	116,922	...	116,434	115,035	1,399	488
1970	112,377	112,377	...	111,887	110,459	1,428	490
1971	116,548	116,548	...	115,996	114,266	1,730	552
1972	117,699	117,699	...	117,034	113,822	3,212	665
1973	118,775	118,775	...	112,511	109,574	2,937	6,264
1974	109,221	109,221	...	102,584	99,705	2,879	6,637
1975	116,224	111,372	4,852	108,002	103,597	4,405	8,222
1976	113,520	107,339	6,181	105,158	99,781	5,377	8,362
1977	118,821	111,473	7,348	109,050	103,492	5,558	9,771
1978	110,015	103,391	6,624	100,247	96,834	3,413	9,768
1979	110,424	103,805	6,619	99,413	96,249	3,164	11,011
1980	107,809	99,922	7,887	96,005	92,768	3,237	11,804
1981	99,653	92,138	7,515	81,079	78,069	3,010	11,059
1982	86,786	80,198	6,588	70,019	67,301	2,718	10,179
1983	82,464	76,271	6,193	66,711	63,304	3,407	9,560
1984	73,794	68,164	5,630	59,256	54,962	4,294	8,908
1985	72,241	66,992	5,249	62,881	58,507	4,374	9,360
1986	69,340	64,147	5,193	60,200	55,639	4,561	9,140
1987	64,777	59,626	5,151	56,329	52,051	4,278	8,448
1988	62,676	57,859	4,817	54,833	50,655	4,178	7,843
1989	59,525	54,916	4,609	51,992	48,226	3,766	7,533
1990	58,060	53,346	4,714	50,879	47,673	3,206	7,181
1991	57,896	52,889	5,007	50,787	47,695	3,092	7,109
1992	56,402	51,273	5,129	49,341	46,302	3,039	7,061
1993	56,408	51,358	5,050	49,465	46,420	3,045	6,943
1994	54,732	49,825	4,907	48,217	45,346	2,871	6,515

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D6—Number of mothers and fathers, by type of benefit, 1950–2009—Continued

Year	Total	Mothers	Fathers	Widowed			Surviving divorced mothers and fathers
				Subtotal	With at least 1 child under age 16 ^a	Entitled solely because of at least 1 disabled child ^b	
1995	51,645	46,874	4,771	45,368	42,817	2,551	6,277
1996	49,150	44,732	4,418	43,538	41,192	2,346	5,612
1997	43,504	39,805	3,699	38,565	36,396	2,169	4,939
1998	42,395	38,533	3,862	37,739	35,577	2,162	4,656
1999	41,756	37,926	3,830	37,271	35,092	2,179	4,485
2000	40,491	36,521	3,970	36,197	34,241	1,956	4,294
2001	41,323	37,106	4,217	36,728	34,753	1,975	4,595
2002	40,829	36,534	4,295	36,186	34,264	1,922	4,643
2003	39,206	34,712	4,494	34,797	32,979	1,818	4,409
2004	40,030	35,499	4,531	35,876	34,176	1,700	4,154
2005	38,248	34,036	4,212	34,256	32,872	1,384	3,992
2006	35,981	31,995	3,986	32,216	30,954	1,262	3,765
2007	33,597	29,869	3,728	29,954	28,691	1,263	3,643
2008	32,717	28,831	3,886	29,215	28,003	1,212	3,502
2009	32,878	28,612	4,266	29,262	27,992	1,270	3,616

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: . . . = not applicable.

- a. Prior to August 1981, benefits were payable to mothers and fathers caring for a child under age 18. For mothers and fathers caring for a child who was at least age 14 and who were entitled in August 1981, benefits were continued until the child attained age 18 or September 1983, whichever came earlier.
- b. Excludes mothers and fathers who had both disabled and nondisabled entitled children in their care.
- c. January–November.
- d. Includes December 1958.

CONTACT: Jennie H. Park (410) 965-9358 or supplement@ssa.gov.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D7—Number and average monthly benefit for widow(er)s, by age and sex, 2009

Age, sex, and type of benefit	Nondisabled				Disabled widow(er)s		Widowed mothers and fathers	
	Widows		Widowers		Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)
	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)				
All widow(er)s	478,914	934.80	37,063	677.00	31,518	666.30	32,878	817.80
By age								
Under 25	...	...	...	...	...	...	977	622.10
25–29	...	...	...	...	...	...	2,459	685.80
30–34	...	...	...	...	...	...	4,014	700.30
35–39	...	...	...	...	...	...	5,921	760.50
40–44	...	...	...	...	...	...	6,874	836.50
45–49	...	...	...	...	...	...	6,637	897.90
50–54	...	...	...	...	15,531	661.20	3,757	941.80
55–59	...	...	...	...	15,762	669.70	1,567	931.50
60–64	158,712	1,086.90	17,577	872.80	219	784.50	575	865.60
60	67,412	1,083.70	6,465	835.60	96	782.60	153	895.30
61	27,399	1,132.50	5,342	872.70	45	842.60	158	854.80
62	25,339	1,078.30	2,635	930.80	42	786.30	118	839.50
63	17,166	1,041.70	1,375	881.60	16	830.10	76	865.90
64	21,396	1,084.90	1,760	914.70	20	623.30	70	868.40
65–69	103,343	922.70	6,854	740.30	6	511.00	97	707.30
65	51,578	1,023.40	3,508	902.90	6	511.00	97	707.30
66	16,710	946.80	1,243	754.80	...	...	...	...
67	11,856	780.30	755	492.90	...	...	...	...
68	11,575	754.30	672	444.30	...	...	...	...
69	11,624	753.90	676	440.20	...	...	...	...
70–74	60,167	752.80	3,459	382.30	...	...	...	...
70	11,906	746.70	687	379.20	...	...	...	...
71	12,019	740.30	648	407.90	...	...	...	...
72	11,794	746.70	684	386.70	...	...	...	...
73	12,128	756.90	697	363.80	...	...	...	...
74	12,320	773.00	743	376.30	...	...	...	...
75–79	61,924	812.10	3,248	368.40	...	...	...	...
75	11,934	781.20	662	363.00	...	...	...	...
76	12,366	790.60	673	380.50	...	...	...	...
77	12,542	816.40	611	363.10	...	...	...	...
78	12,720	831.40	645	358.40	...	...	...	...
79	12,362	839.10	657	376.20	...	...	...	...
80 or older	94,768	889.10	5,925	363.80	...	...	...	...
By sex								
Men	...	...	37,063	677.00	2,344	494.20	4,266	684.80
Women	478,914	934.80	...	...	29,174	680.10	28,612	837.60
Widow or mother	413,941	930.00	...	...	24,933	677.10	25,314	838.00
Surviving divorced wife or mother	64,973	965.90	...	...	4,241	698.00	3,298	834.50

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Effective 2006, age is based on date of entitlement and not date of award. Entitlement can be retroactive and thus precede the date of award.

... = not applicable.

a. Benefits awarded before the December cost-of-living increase are converted to the December rates before averages are computed.

CONTACT: Jennie H. Park (410) 965-9358 or supplement@ssa.gov.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D8—Number of widow(er)s, by type of benefit, 1950–2009

Year	Total	Entitled because of age		Entitled because of disability	
		Widows	Widowers	Widows	Widowers
1950	66,735	66,672	63	...	...
1951	89,591	89,324	267	...	...
1952	92,302	91,992	310	...	...
1953	112,866	112,467	399	...	...
1954	128,026	127,626	400	...	...
1955	140,624	140,273	351	...	...
1956	253,524	253,191	333	...	...
1957	244,633	244,172	461	...	...
1958 ^a	199,320	198,948	372	...	...
1959 ^b	252,683	252,100	583	...	...
1960	239,267	238,813	454	...	...
1961	251,275	250,606	669	...	...
1962	267,051	266,465	586	...	...
1963	278,709	278,138	571	...	...
1964	283,263	282,689	574	...	...
1965	359,431	358,875	556	...	...
1966	403,595	403,035	560	...	...
1967	355,589	355,032	557	...	...
1968	375,391	352,280	604	22,438	69
1969	375,753	353,928	625	21,127	73
1970	363,216	347,031	576	15,546	63
1971	381,262	363,689	551	16,960	62
1972	402,809	382,452	544	19,739	74
1973	372,167	351,793	651	19,660	63
1974	363,693	343,317	550	19,793	33
1975	377,246	353,249	476	23,476	45
1976	385,373	362,229	489	22,603	52
1977	416,735	383,057	10,416	22,981	281
1978	403,679	375,750	9,022	18,553	354
1979	445,555	418,883	9,272	17,136	264
1980	452,156	424,690	11,412	15,789	265
1981	480,772	453,307	13,311	13,868	286
1982	492,451	465,070	14,941	12,222	218
1983	501,688	470,764	16,512	14,144	268
1984	499,677	464,979	17,533	16,847	318
1985	501,673	467,197	17,390	16,759	327
1986	491,052	454,903	17,731	18,033	385
1987	475,035	440,803	17,836	16,062	334
1988	457,574	424,107	18,139	14,979	349
1989	449,139	416,154	17,817	14,830	338
1990	451,862	417,925	18,513	15,058	366
1991	468,788	420,190	19,008	28,951	639
1992	472,078	419,413	19,430	32,477	758
1993	466,198	414,941	19,422	31,036	799
1994	459,340	410,323	19,114	29,075	828
1995	444,899	396,725	18,577	28,762	835
1996	438,081	390,962	18,508	27,783	828
1997	440,076	393,014	18,516	27,691	855
1998	443,669	395,231	19,039	28,494	905
1999	469,806	419,205	20,951	28,654	996

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D8—Number of widow(er)s, by type of benefit, 1950–2009—Continued

Year	Total	Entitled because of age		Entitled because of disability	
		Widows	Widowers	Widows	Widowers
2000	505,021	453,334	23,645	26,997	1,045
2001	495,848	443,267	24,309	27,179	1,093
2002	522,537	465,627	27,306	28,211	1,393
2003	508,306	451,583	28,209	27,130	1,384
2004	513,839	456,732	29,033	26,621	1,453
2005	516,949	457,549	29,579	28,127	1,694
2006	512,320	453,754	29,884	27,067	1,615
2007	569,862	509,524	31,528	27,066	1,744
2008	589,940	524,757	34,578	28,500	2,105
2009	547,495	478,914	37,063	29,174	2,344

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Beginning with 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

... = not applicable.

- a. January–November.
- b. Includes December 1958.

CONTACT: Jennie H. Park (410) 965-9358 or supplement@ssa.gov.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D9—Number and average amount of lump-sum death payment awards, 1940–2009

Year	Number of—		Average lump sum per worker (dollars)
	Deceased workers	Lump-sum payments	
1940	61,080	75,095	145.79
1941	90,941	117,303	144.58
1942	103,322	134,991	144.77
1943	122,185	163,011	145.66
1944	151,869	205,117	145.68
1945	178,813	247,012	146.05
1946	179,588	250,706	151.74
1947	181,992	218,787	162.16
1948	200,090	213,096	161.50
1949	202,154	212,614	164.02
1950	200,411	209,960	147.81
1951	414,470	431,229	138.24
1952	437,896	456,531	178.20
1953	511,986	532,846	174.16
1954	516,158	536,341	207.86
1955	566,830	589,612	202.72
1956	546,984	572,291	200.80
1957	689,282	718,672	201.63
1958 ^a	656,825	683,964	202.52
1959 ^b	822,413	855,032	212.67
1960	778,660	809,194	211.55
1961	813,464	843,308	210.46
1962	865,217	892,261	212.02
1963	968,651	1,015,536	212.61
1964	1,011,414	1,073,044	213.94
1965	989,848	1,046,874	226.01
1966	1,060,335	1,138,317	224.00
1967	1,133,787	1,217,980	222.51
1968	1,158,666	1,216,910	236.30
1969	1,253,467	1,295,897	232.60
1970	1,220,248	1,257,687	243.90
1971	1,251,831	1,283,924	244.20
1972	1,290,133	1,320,637	247.90
1973	1,299,223	1,325,833	253.10
1974	1,285,221	1,307,890	254.64
1975	1,334,914	1,344,095	252.47
1976	1,321,516	1,328,008	251.60
1977	1,227,390	1,240,304	254.17
1978	1,437,275	1,451,140	254.65
1979	1,500,944	1,515,614	254.68
1980	1,552,617	1,566,330	254.70
1981	1,305,261	1,321,565	254.72
1982	797,096	808,041	255.00
1983	805,524	807,537	255.00
1984	825,494	831,761	255.00
1985	823,053	825,395	255.00
1986	809,487	811,946	255.00
1987	810,066	812,814	255.00
1988	839,802	842,037	255.00
1989	829,682	831,825	255.00

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D9—Number and average amount of lump-sum death payment awards, 1940–2009—Continued

Year	Number of—		Average lump sum per worker (dollars)
	Deceased workers	Lump-sum payments	
1990	830,799	832,900	255.00
1991	847,838	850,100	255.00
1992	855,073	857,614	255.00
1993	860,861	863,492	255.00
1994	852,289	855,278	255.00
1995	835,360	838,015	255.00
1996	832,304	835,277	255.00
1997	825,176	828,072	255.00
1998	833,770	836,468	255.00
1999	873,890	876,878	255.00
2000	845,135	850,411	255.00
2001	843,983	849,102	255.00
2002	837,338	842,060	255.00
2003	817,591	821,613	255.00
2004	821,491	826,408	255.00
2005	827,492	830,912	255.00
2006	817,859	821,581	255.00
2007	801,546	806,447	255.00
2008	814,112	816,878	255.00
2009	775,580	807,601	255.00

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

- a. January–November.
- b. Includes December 1958.

CONTACT: Jennie H. Park (410) 965-9358 or supplement@ssa.gov.

6.E OASDI: Benefits Withheld

Table 6.E1—Number and percentage distribution of retired workers with benefits withheld, with and without reduction for early retirement, by sex and monthly benefit, December 2009

Sex and monthly benefit (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	203,112	100.0	47,049	100.0	156,063	100.0
Less than 350.00	46,959	23.1	12,996	27.6	33,963	21.8
350.00–399.90	3,918	1.9	693	1.5	3,225	2.1
400.00–449.90	6,301	3.1	3,702	7.9	2,599	1.7
450.00–499.90	4,266	2.1	1,441	3.1	2,825	1.8
500.00–549.90	5,559	2.7	1,331	2.8	4,228	2.7
550.00–599.90	6,598	3.2	1,775	3.8	4,823	3.1
600.00–649.90	7,212	3.6	1,974	4.2	5,238	3.4
650.00–699.90	7,089	3.5	1,811	3.8	5,278	3.4
700.00–749.90	7,421	3.7	1,789	3.8	5,632	3.6
750.00–799.90	7,209	3.5	1,619	3.4	5,590	3.6
800.00–849.90	6,998	3.4	1,501	3.2	5,497	3.5
850.00–899.90	6,317	3.1	1,348	2.9	4,969	3.2
900.00–949.90	6,218	3.1	1,363	2.9	4,855	3.1
950.00–999.90	5,670	2.8	1,138	2.4	4,532	2.9
1,000.00–1,049.90	5,563	2.7	1,172	2.5	4,391	2.8
1,050.00–1,099.90	5,339	2.6	1,063	2.3	4,276	2.7
1,100.00–1,149.90	4,962	2.4	919	2.0	4,043	2.6
1,150.00–1,199.90	4,667	2.3	851	1.8	3,816	2.4
1,200.00–1,249.90	4,363	2.1	737	1.6	3,626	2.3
1,250.00–1,299.90	4,260	2.1	710	1.5	3,550	2.3
1,300.00–1,349.90	3,780	1.9	602	1.3	3,178	2.0
1,350.00–1,399.90	3,641	1.8	543	1.2	3,098	2.0
1,400.00–1,449.90	4,387	2.2	497	1.1	3,890	2.5
1,450.00–1,499.90	4,318	2.1	469	1.0	3,849	2.5
1,500.00 or more	30,097	14.8	5,005	10.6	25,092	16.1
Men	117,199	100.0	30,034	100.0	87,165	100.0
Less than 350.00	20,755	17.7	5,667	18.9	15,088	17.3
350.00–399.90	2,297	2.0	430	1.4	1,867	2.1
400.00–449.90	4,232	3.6	2,707	9.0	1,525	1.7
450.00–499.90	2,678	2.3	1,062	3.5	1,616	1.9
500.00–549.90	3,306	2.8	1,006	3.3	2,300	2.6
550.00–599.90	3,754	3.2	1,269	4.2	2,485	2.9
600.00–649.90	3,852	3.3	1,365	4.5	2,487	2.9
650.00–699.90	3,621	3.1	1,307	4.4	2,314	2.7
700.00–749.90	3,514	3.0	1,240	4.1	2,274	2.6
750.00–799.90	3,288	2.8	1,092	3.6	2,196	2.5
800.00–849.90	3,218	2.7	1,026	3.4	2,192	2.5
850.00–899.90	2,990	2.6	927	3.1	2,063	2.4
900.00–949.90	3,210	2.7	961	3.2	2,249	2.6
950.00–999.90	2,981	2.5	777	2.6	2,204	2.5
1,000.00–1,049.90	3,018	2.6	795	2.6	2,223	2.6
1,050.00–1,099.90	3,016	2.6	735	2.4	2,281	2.6
1,100.00–1,149.90	2,926	2.5	631	2.1	2,295	2.6
1,150.00–1,199.90	2,860	2.4	610	2.0	2,250	2.6
1,200.00–1,249.90	2,725	2.3	495	1.6	2,230	2.6
1,250.00–1,299.90	2,769	2.4	492	1.6	2,277	2.6
1,300.00–1,349.90	2,493	2.1	416	1.4	2,077	2.4
1,350.00–1,399.90	2,537	2.2	388	1.3	2,149	2.5
1,400.00–1,449.90	3,133	2.7	363	1.2	2,770	3.2
1,450.00–1,499.90	3,183	2.7	321	1.1	2,862	3.3
1,500.00 or more	24,843	21.2	3,952	13.2	20,891	24.0

(Continued)

Table 6.E1—Number and percentage distribution of retired workers with benefits withheld, with and without reduction for early retirement, by sex and monthly benefit, December 2009—Continued

Sex and monthly benefit (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	85,913	100.0	17,015	100.0	68,898	100.0
Less than 350.00	26,204	30.5	7,329	43.1	18,875	27.4
350.00–399.90	1,621	1.9	263	1.5	1,358	2.0
400.00–449.90	2,069	2.4	995	5.8	1,074	1.6
450.00–499.90	1,588	1.8	379	2.2	1,209	1.8
500.00–549.90	2,253	2.6	325	1.9	1,928	2.8
550.00–599.90	2,844	3.3	506	3.0	2,338	3.4
600.00–649.90	3,360	3.9	609	3.6	2,751	4.0
650.00–699.90	3,468	4.0	504	3.0	2,964	4.3
700.00–749.90	3,907	4.5	549	3.2	3,358	4.9
750.00–799.90	3,921	4.6	527	3.1	3,394	4.9
800.00–849.90	3,780	4.4	475	2.8	3,305	4.8
850.00–899.90	3,327	3.9	421	2.5	2,906	4.2
900.00–949.90	3,008	3.5	402	2.4	2,606	3.8
950.00–999.90	2,689	3.1	361	2.1	2,328	3.4
1,000.00–1,049.90	2,545	3.0	377	2.2	2,168	3.1
1,050.00–1,099.90	2,323	2.7	328	1.9	1,995	2.9
1,100.00–1,149.90	2,036	2.4	288	1.7	1,748	2.5
1,150.00–1,199.90	1,807	2.1	241	1.4	1,566	2.3
1,200.00–1,249.90	1,638	1.9	242	1.4	1,396	2.0
1,250.00–1,299.90	1,491	1.7	218	1.3	1,273	1.8
1,300.00–1,349.90	1,287	1.5	186	1.1	1,101	1.6
1,350.00–1,399.90	1,104	1.3	155	0.9	949	1.4
1,400.00–1,449.90	1,254	1.5	134	0.8	1,120	1.6
1,450.00–1,499.90	1,135	1.3	148	0.9	987	1.4
1,500.00 or more	5,254	6.1	1,053	6.2	4,201	6.1

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

CONTACT: Boris Shargorodsky (410) 965-2832 or supplement@ssa.gov.

6.E OASDI: Benefits Withheld

Table 6.E4—Number of beneficiaries with benefits withheld, by reason for withholding payment and type of benefit, December 2009

Reason payment withheld	Total, all beneficiaries	Retired workers			Disabled workers	Wives and husbands				Children	Widowed mothers and fathers	Widow-(er)s	Parents
		Subtotal	Men	Women		Subtotal	Wives		Husbands				
							Without children ^a	With children ^b					
Total	2,240,985	203,112	117,199	85,913	140,932	354,192	236,551	42,914	74,727	637,371	51,498	853,250	630
Earnings of—													
Retired workers	78,351	73,700	40,761	32,939	...	2,795	2,463	194	138	1,856	...	...	...
Other beneficiaries	68,122	...	...	...	...	25,882	1,239	22,558	2,085	105	28,706	13,429	...
Entitled child not in care of beneficiary	24,859	...	...	...	...	11,061	...	10,377	684	...	13,798	...	...
Payee not determined	10,519	775	353	422	1,929	58	55	1	2	7,358	2	397	...
Recoupment of overpayment for reasons other than earnings	37,459	10,566	5,371	5,195	7,531	2,115	1,257	791	67	12,189	1,637	3,419	2
Address unknown	82,377	27,334	16,083	11,251	14,140	2,459	1,704	468	287	26,656	319	11,415	54
Determination of continuing disability pending	7,108	...	...	...	4,681	84	2	79	3	2,322	4	17	...
Workers' compensation offset	5,843	...	...	...	2,241	317	73	229	15	3,285	...	...	...
Government pension offset	387,693	...	...	...	...	247,753	181,729	69	65,955	...	99	139,841	...
Technical entitlement	1,214,882	...	...	...	...	30,905	23,037	5,117	2,751	524,664	1,901	657,301	111
Other reasons	323,772	90,737	54,631	36,106	110,410	30,763	24,992	3,031	2,740	58,936	5,032	27,431	463

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: ... = not applicable.

a. Aged 62 or older.

b. Under age 65 with entitled children in their care.

CONTACT: Boris Shargorodsky (410) 965-2832 or supplement@ssa.gov.

Table 6.E5—Number of wives, husbands, and children with benefits withheld, by reason for withholding payment and type of benefit, December 2009

Reason payment withheld	Wives and husbands of—		Children under age 18 of—			Disabled adult children of—			Students aged 18–19 of—		
	Retired workers	Disabled workers	Retired workers	Deceased workers	Disabled workers	Retired workers	Deceased workers	Disabled workers	Retired workers	Deceased workers	Disabled workers
Total	307,882	46,310	26,818	46,813	303,166	110,247	101,165	40,486	1,174	2,300	5,202
Earnings of—											
Retired workers	2,795	...	1,473	...	...	301	...	...	82	...	...
Other beneficiaries	5,858	20,024	25	21	30	8	11	...	4	1	5
Entitled child not in care of beneficiary	1,639	9,422	...	...	...	...	...	...	...	...	...
Payee not determined	57	1	388	2,622	2,906	208	1,057	127	4	27	19
Recoupment of overpayment for reasons other than earnings	1,323	792	520	2,757	7,639	232	527	139	21	173	181
Address unknown	1,990	469	1,359	6,116	13,978	782	3,235	699	53	248	186
Determination of continuing disability pending	...	84	...	...	1,699	102	354	155	...	...	12
Workers' compensation offset	...	317	...	...	3,092	...	...	109	...	...	84
Government pension offset	244,146	3,607	...	...	...	...	...	...	...	...	...
Technical entitlement	22,000	8,905	19,520	25,536	248,749	105,298	84,497	34,279	935	1,557	4,293
Other reasons	28,074	2,689	3,533	9,761	25,073	3,316	11,484	4,978	75	294	422

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: ... = not applicable.

CONTACT: Boris Shargorodsky (410) 965-2832 or supplement@ssa.gov.

6.F OASDI: Benefits Terminated

Table 6.F1—Number of benefits terminated, by type, 1940–2009

Year	Total, all benefits ^a	Retired workers	Disabled workers	Wives and husbands	Children				Widowed mothers and fathers	Widow(er)s	Parents
					Total	Under age 18	Disabled adult children	Students			
Total	157,624,581	57,307,375	17,886,933	18,939,110	43,746,652	27,707,495	967,478	15,071,679	4,783,132	14,852,793	108,586
1940–1944	246,534	84,737	...	40,811	73,394	73,394	...	...	40,868	5,680	1,044
1945–1949	896,041	304,902	...	154,261	250,835	250,835	...	...	145,998	36,144	3,901
1950	266,615	98,280	...	51,200	69,062	69,062	...	...	33,313	13,642	1,118
1951	354,282	141,665	...	73,706	82,516	82,516	...	...	37,016	17,999	1,380
1952	383,780	160,284	...	85,349	75,352	75,352	...	...	40,085	20,978	1,732
1953	455,652	193,688	...	99,409	89,292	89,292	...	...	44,331	27,006	1,926
1954	501,694	212,894	...	111,788	99,375	99,375	...	...	45,870	29,871	1,896
1955	579,229	247,998	...	125,880	117,443	117,443	...	...	49,330	36,488	2,090
1956	624,981	269,006	...	134,700	128,391	128,391	...	...	51,874	38,849	2,161
1957	789,331	334,710	16,131	178,464	146,828	146,540	288	...	54,715	56,022	2,461
1958	817,512	322,279	52,949	173,608	156,944	156,348	596	...	52,088	57,422	2,222
1959	1,163,018	458,175	81,982	255,169	211,711	209,948	1,763	...	67,346	85,401	3,234
1960	1,170,612	440,555	89,090	249,792	235,965	233,512	2,453	...	67,555	84,396	3,259
1961	1,327,950	471,552	115,546	276,437	290,895	287,599	3,296	...	77,778	92,322	3,420
1962	1,410,718	507,807	128,299	282,569	311,045	307,200	3,845	...	78,261	99,332	3,405
1963	1,672,045	591,951	137,850	330,576	397,764	392,606	5,158	...	92,246	117,743	3,915
1964	1,739,693	616,124	138,576	333,969	424,680	418,834	5,846	...	96,116	126,328	3,900
1965	1,868,804	646,734	156,648	345,229	481,215	448,344	6,628	26,243	98,058	137,031	3,889
1966	2,178,105	696,038	168,630	351,877	704,131	457,688	7,329	239,114	92,054	158,302	3,749
1967	2,545,076	748,184	208,899	373,803	820,610	503,110	9,178	308,322	102,004	172,411	3,789
1968	2,654,191	789,586	222,197	386,245	837,390	514,363	10,620	312,407	100,344	188,844	4,004
1969	2,860,287	827,151	251,269	399,689	946,481	564,725	11,922	369,834	107,119	205,188	3,525
1970	2,841,523	817,129	260,444	388,574	956,566	582,918	11,795	361,853	102,578	208,843	3,313
1971	2,944,134	846,103	266,471	394,422	1,011,381	607,138	11,621	392,622	104,577	223,988	3,162
1972	2,949,327	839,018	261,739	384,297	1,037,251	605,569	13,924	417,758	108,995	232,375	2,950
1973	3,132,957	873,593	304,792	396,828	1,137,641	637,851	12,445	487,345	103,056	234,039	2,955
1974	3,296,247	921,897	320,958	416,891	1,205,329	699,400	15,288	490,641	116,061	243,139	2,886
1975	3,313,151	931,953	329,532	421,973	1,209,574	695,082	15,195	499,297	110,493	249,274	2,574
1976	3,405,273	941,162	351,504	424,417	1,262,306	711,425	16,104	534,777	114,823	256,020	2,412
1977	3,551,125	955,114	401,334	430,431	1,331,923	740,822	17,060	574,041	114,605	265,721	2,285
1978	3,589,849	977,703	413,571	428,498	1,342,365	736,536	17,496	588,333	112,491	271,102	2,106
1979	3,568,400	953,520	422,503	426,014	1,346,176	726,910	18,598	600,668	111,604	272,422	1,831
1980	3,538,615	1,009,542	408,051	420,313	1,259,831	636,825	14,561	608,445	118,300	289,326	1,705
1981	3,596,613	1,006,756	434,187	419,331	1,305,554	664,436	15,482	625,636	111,025	291,081	1,649
1982	3,869,989	1,032,327	483,847	437,104	1,485,066	677,326	16,435	791,305	109,210	298,435	1,521
1983	3,788,835	1,068,963	453,621	492,524	1,223,789	584,312	19,706	619,771	214,361	309,168	1,448
1984	3,230,134	1,102,737	371,913	373,796	954,150	498,199	19,277	436,674	88,342	319,858	1,283
1985	3,109,569	1,150,236	339,984	367,257	820,641	446,106	17,022	357,513	84,165	331,090	1,228
1986	2,996,494	1,152,844	341,276	362,966	703,293	474,999	17,013	211,281	90,071	329,855	1,110
1987	2,967,965	1,163,655	347,948	354,240	681,275	457,523	17,056	206,696	80,131	328,008	1,041
1988	3,087,126	1,227,357	356,143	354,250	723,385	484,001	19,478	219,906	73,473	341,432	922
1989	2,977,413	1,202,430	351,402	339,550	678,094	454,048	19,726	204,320	66,527	332,040	856
1990	2,958,646	1,222,810	348,194	337,006	646,343	415,616	20,014	210,713	64,260	334,293	769
1991	2,943,272	1,237,517	351,303	332,892	619,977	401,092	17,723	201,162	61,383	335,740	646
1992	2,969,109	1,252,171	361,796	329,102	616,771	397,723	17,857	201,191	65,852	339,827	617
1993	3,075,227	1,313,867	372,317	336,335	632,585	408,497	18,842	205,246	62,436	354,833	578
1994	3,124,009	1,329,241	384,590	331,416	647,848	421,730	20,034	206,084	72,662	356,097	529
1995	3,161,744	1,334,027	399,475	327,233	678,821	451,375	22,639	204,807	61,813	358,691	493
1996	3,187,291	1,352,339	396,980	321,703	690,618	459,254	23,776	207,588	61,618	362,751	444
1997	3,413,296	1,370,596	464,984	319,172	777,803	537,259	26,210	214,334	60,342	419,105	376
1998	3,307,618	1,405,342	409,489	313,423	741,412	495,678	26,755	218,979	54,551	382,619	346
1999	3,366,363	1,436,865	433,950	312,867	748,950	490,634	29,444	228,872	51,341	381,791	361

(Continued)

Table 6.F1—Number of benefits terminated, by type, 1940–2009—Continued

Year	Total, all benefits ^a	Retired workers	Disabled workers	Wives and husbands	Children				Widowed mothers and fathers	Widow(er)s	Parents
					Total	Under age 18	Disabled adult children	Students			
2000	3,404,466	1,447,269	460,351	310,703	753,430	502,351	33,300	217,779	50,925	381,341	282
2001	3,440,679	1,460,763	459,073	304,413	775,873	515,300	32,988	227,585	49,838	390,315	289
2002	3,494,924	1,465,869	478,098	306,796	807,955	534,181	34,722	239,052	49,919	385,945	265
2003	3,411,500	1,447,461	447,485	292,156	796,560	526,475	33,030	237,055	47,418	380,155	226
2004	3,480,809	1,453,625	458,359	292,183	849,643	555,137	32,802	261,704	48,610	378,153	208
2005	3,522,025	1,479,956	485,715	285,609	845,835	566,052	35,018	244,765	46,275	378,403	209
2006	3,607,381	1,473,218	506,663	292,969	912,478	616,362	44,575	251,541	47,326	374,512	178
2007	3,483,878	1,475,216	510,645	251,573	841,266	553,094	32,031	256,141	41,264	363,725	189
2008	3,622,908	1,521,555	550,593	252,485	871,484	568,468	35,093	267,923	39,200	387,406	185
2009	3,621,331	1,489,329	617,587	240,867	864,091	543,314	36,421	284,356	36,842	372,476	139

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: . . . = not applicable.

a. From 1966–2006, total includes special age-72 beneficiaries.

CONTACT: Jennie H. Park (410) 965-9358 or supplement@ssa.gov.

6.F OASDI: Benefits Terminated

Table 6.F2—Number, by reason for termination and type of benefit, 2009

Reason for termination	All benefits	Retired workers	Disabled workers	Wives and husbands	Children	Widowed mothers and fathers	Widow(er)s and parents
Total	3,621,331	1,489,329	617,587	240,867	864,091	36,842	372,615
Death of beneficiary	2,022,941	1,398,994	226,794	72,535	23,227	731	300,660
Death of worker	145,010	...	...	118,078	26,932	...	...
Marriage, remarriage, or divorce of beneficiary	13,797	...	...	2,364	5,381	5,927	125
Attainment of age—							
16 by child	46,531	...	...	19,033	...	27,498	...
18 by child	472,203	...	...	...	472,203	...	...
19 by student	58,358	...	...	...	58,358	...	...
FRA by disabled worker	353,813	...	335,961	8,881	8,971	...	...
FRA by disabled widow(er)	--	...	...	...	...	...	--
Entitlement to an equal or larger Social Security benefit	134,967	67,885	2,456	6,998	3,023	1,909	52,696
Does not meet medical standards ^a							
Disabled worker or widow(er)	81,373	...	47,427	1,100	32,636	...	210
Disabled adult child	3,307	...	...	...	3,307	...	...
Student no longer attending school	220,961	...	...	...	220,961	...	...
Other	68,070	22,450	4,949	11,878	9,092	777	18,924

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: ... = not applicable; -- = not available; FRA = full retirement age.

a. Excludes disabled beneficiaries whose monthly benefits have been suspended because of their ability to engage in substantial gainful activity. These persons continue to be eligible for Medicare for a 3-year period.

CONTACT: Jennie H. Park (410) 965-9358 or supplement@ssa.gov.

Table 6.F3—Number of wives, husbands, and children, by reason for termination and type of benefit, 2009

Reason for termination	Wives and husbands of—		Children under age 18 of—			Disabled adult children of—			Students aged 18–19 of—		
	Retired workers	Disabled workers	Retired workers	Deceased workers	Disabled workers	Retired workers	Deceased workers	Disabled workers	Retired workers	Deceased workers	Disabled workers
Total	207,212	33,654	59,476	197,401	286,437	6,124	20,381	9,916	37,242	131,240	115,874
Death of beneficiary	70,830	1,705	142	992	778	4,086	16,314	765	13	85	52
Death of worker	114,009	4,069	...	...	23,158	...	...	2,325	...	...	1,449
Marriage, remarriage, or divorce of beneficiary	873	1,491	306	430	1,265	609	1,543	910	30	128	160
Attainment of age—											
16 by child	6,944	12,089	...	...	...	...	...	...	...	...	...
18 by child	...	...	56,887	195,358	219,958	...	...	...	...	...	...
19 by student	...	...	...	...	...	...	...	...	7,150	29,296	21,912
FRA by disabled worker	...	8,881	...	...	5,807	...	...	2,833	...	...	331
Entitlement to an equal or larger Social Security benefit	5,483	1,515	1,468	118	412	464	264	148	133	3	13
Does not meet medical standards ^a											
Disabled worker	...	1,100	...	...	30,804	...	...	1,533	...	...	299
Disabled adult child	...	...	...	...	...	728	2,181	398	...	...	...
Student no longer attending school	...	...	...	...	...	...	...	...	29,515	101,123	90,323
Other	9,073	2,804	673	503	4,255	237	79	1,004	401	605	1,335

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: ... = not applicable; FRA = full retirement age.

a. Excludes disabled beneficiaries whose monthly benefits have been suspended because of their ability to engage in substantial gainful activity. These persons continue to be eligible for Medicare for a 3-year period.

CONTACT: Jennie H. Park (410) 965-9358 or supplement@ssa.gov.



Supplemental Security Income

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Table 7.A1—Number of recipients of federally administered payments, total payments, and average monthly payment, by source of payment, eligibility category, and age, December 2009

Source of payment	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older ^a
Number of recipients							
Total	7,676,686	1,185,959	69,302	6,421,425	1,199,788	4,451,288	2,025,610
Federal payment only	5,337,340	598,193	40,769	4,698,378	958,456	3,252,098	1,126,786
Federal payment and state supplementation	2,085,539	502,433	24,324	1,558,782	239,746	1,071,361	774,432
State supplementation only	253,807	85,333	4,209	164,265	1,586	127,829	124,392
Total with—							
Federal payment	7,422,879	1,100,626	65,093	6,257,160	1,198,202	4,323,459	1,901,218
State supplementation	2,339,346	587,766	28,533	1,723,047	241,332	1,199,190	898,824
Total payments^b (thousands of dollars)							
Total	4,120,127	475,505	36,702	3,607,920	749,310	2,548,839	821,978
Federal payments	3,812,757	395,498	31,146	3,386,113	736,024	2,378,352	698,381
State supplementation	307,370	80,008	5,556	221,807	13,286	170,488	123,597
Average monthly payment^c (dollars)							
Total	498.75	399.14	520.30	516.93	593.07	516.49	403.95
Federal payments	476.33	357.86	470.63	497.26	583.55	495.26	365.84
State supplementation	124.96	134.96	189.20	120.48	51.28	131.31	136.30

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

- a. Includes approximately 14,900 blind and 824,700 disabled persons aged 65 or older.
b. Includes retroactive payments.
c. Excludes retroactive payments.

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

Table 7.A2—Number of individuals and couples receiving federally administered payments, total payments, and average monthly payment, by source of payment and eligibility category, December 2009

Source of payment	Aged		Blind		Disabled		Blind and disabled under age 18
	Individual	Couple	Individual	Couple	Individual	Couple	
Number of recipients							
Total	919,527	133,820	59,483	2,535	4,940,236	142,471	1,199,788
Federal payment only	492,072	53,186	35,151	1,069	3,572,277	85,369	958,456
Federal payment and state supplementation	366,507	68,892	20,507	1,246	1,217,450	50,836	239,746
State supplementation only	60,948	11,742	3,825	220	150,509	6,266	1,586
Total with—							
Federal payment	858,579	122,078	55,658	2,315	4,789,727	136,205	1,198,202
State supplementation	427,455	80,634	24,332	1,466	1,367,959	57,102	241,332
Total payments^a (thousands of dollars)							
Total	370,473	106,973	31,166	2,380	2,746,467	113,359	749,310
Federal payments	314,295	82,982	26,472	1,722	2,554,898	96,364	736,024
State supplementation	56,178	23,991	4,694	658	191,569	16,995	13,286
Average monthly payment^b (dollars)							
Total	401.41	792.45	514.69	906.05	506.07	764.78	593.07
Federal payments	364.78	675.01	467.60	722.75	484.54	679.93	583.55
State supplementation	130.28	294.74	187.70	427.86	130.75	288.61	51.28

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

- a. Includes retroactive payments.
b. Excludes retroactive payments.

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

7.A SSI: Summary

Table 7.A3—Number of recipients of federally administered payments, by eligibility category, January 1974 and December 1975–2009, selected years

Month and year	Total ^a	Federal SSI	Federally administered state supplementation	State supplementation only
<i>All recipients</i>				
January 1974	3,215,632	2,955,959	1,480,309	259,673
December				
1975	4,314,275	3,893,419	1,684,018	420,856
1980	4,142,017	3,682,411	1,684,765	459,606
1985	4,138,021	3,799,092	1,660,847	338,929
1990	4,817,127	4,412,131	2,058,273	404,996
1995	6,514,134	6,194,493	2,517,805	319,641
2000	6,601,686	6,319,907	2,480,637	281,779
2001	6,688,489	6,410,138	2,520,005	278,351
2002	6,787,857	6,505,227	2,461,652	282,630
2003	6,902,364	6,614,465	2,467,116	287,899
2004	6,987,845	6,694,577	2,497,589	293,268
2005	7,113,879	6,818,944	2,242,112	294,935
2006	7,235,583	6,938,690	2,268,579	296,893
2007	7,359,525	7,061,234	2,302,130	298,291
2008	7,520,501	7,219,012	2,343,599	301,489
2009	7,676,686	7,422,879	2,339,346	253,807
<i>Aged</i>				
January 1974	1,865,109	1,690,496	770,318	174,613
December				
1975	2,307,105	2,024,765	843,917	282,340
1980	1,807,776	1,533,366	702,763	274,410
1985	1,504,469	1,322,292	583,913	182,177
1990	1,454,041	1,256,623	649,530	197,418
1995	1,446,122	1,314,720	663,390	131,402
2000	1,289,339	1,186,309	622,668	103,030
2001	1,264,463	1,164,825	620,952	99,638
2002	1,251,528	1,151,652	611,395	99,876
2003	1,232,778	1,132,947	602,807	99,831
2004	1,211,167	1,110,757	601,078	100,410
2005	1,214,296	1,112,779	584,787	101,517
2006	1,211,656	1,108,925	590,575	102,731
2007	1,204,512	1,101,440	595,555	103,072
2008	1,203,256	1,100,188	600,909	103,068
2009	1,185,959	1,100,626	587,766	85,333
<i>Blind</i>				
January 1974	72,390	55,680	37,326	16,710
December				
1975	74,489	68,375	31,376	6,114
1980	78,401	68,945	36,214	9,456
1985	82,220	73,817	38,291	8,403
1990	83,686	74,781	40,334	8,905
1995	83,545	77,064	38,695	6,481
2000	78,511	72,931	35,940	5,580
2001	78,255	72,811	35,708	5,444
2002	77,658	72,189	34,596	5,469
2003	77,082	71,621	34,142	5,461
2004	75,924	70,469	33,765	5,455
2005	75,039	69,637	31,346	5,402
2006	73,418	68,165	30,657	5,253
2007	71,727	66,611	30,048	5,116
2008	70,325	65,330	29,535	4,995
2009	69,302	65,093	28,533	4,209

(Continued)

Table 7.A3—Number of recipients of federally administered payments, by eligibility category, January 1974 and December 1975–2009, selected years—Continued

Month and year	Total ^a	Federal SSI	Federally administered state supplementation	State supplementation only
		<i>Disabled</i>		
January 1974	1,278,122	1,209,783	672,575	68,350
December				
1975	1,932,681	1,800,279	808,725	132,402
1980	2,255,840	2,080,100	945,788	175,740
1985	2,551,332	2,402,983	1,038,643	148,349
1990	3,279,400	3,080,727	1,368,409	198,673
1995	4,984,467	4,802,709	1,815,720	181,758
2000	5,233,836	5,060,667	1,822,029	173,169
2001	5,345,771	5,172,502	1,863,345	173,269
2002	5,458,671	5,281,386	1,815,661	177,285
2003	5,592,504	5,409,897	1,830,167	182,607
2004	5,700,754	5,513,351	1,862,746	187,403
2005	5,824,544	5,636,528	1,625,979	188,016
2006	5,950,509	5,761,600	1,647,347	188,909
2007	6,083,286	5,893,183	1,676,527	190,103
2008	6,246,920	6,053,494	1,713,155	193,426
2009	6,421,425	6,257,160	1,723,047	164,265

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

a. Total equals the sum of "Federal SSI" and "State supplementation only."

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

7.A SSI: Summary

**Table 7.A4—Total federally administered payments, by eligibility category, selected years 1974–2009
(in thousands of dollars)**

Year	Total	Federal SSI	Federally administered state supplementation
<i>All recipients</i>			
1974	5,096,813	3,833,161	1,263,652
1975	5,716,072	4,313,538	1,402,534
1980	7,714,640	5,866,354	1,848,286
1985	10,749,938	8,777,341	1,972,597
1990	16,132,959	12,893,805	3,239,154
1995	27,037,280	23,919,430	3,117,850
2000	30,671,699	27,290,248	3,381,451
2001	32,165,856	28,705,503	3,460,353
2002	33,718,999	29,898,765	3,820,234
2003	34,693,278	30,688,029	4,005,249
2004	36,065,358	31,886,509	4,178,849
2005	37,235,843	33,058,056	4,177,787
2006	38,888,961	34,736,088	4,152,873
2007	41,204,645	36,884,066	4,320,579
2008	43,040,481	38,655,780	4,384,701
2009	46,592,308	42,628,709	3,963,606
<i>Aged</i>			
1974	2,414,034	1,782,742	631,292
1975	2,516,515	1,842,980	673,535
1980	2,617,023	1,860,194	756,829
1985	2,896,671	2,202,557	694,114
1990	3,559,388	2,521,382	1,038,006
1995	4,239,222	3,374,772	864,450
2000	4,540,045	3,597,516	942,530
2001	4,664,076	3,708,527	955,549
2002	4,802,792	3,751,491	1,051,301
2003	4,856,875	3,758,070	1,098,805
2004	4,894,070	3,773,901	1,133,324
2005	4,964,627	3,836,625	1,128,002
2006	5,115,911	3,953,106	1,162,804
2007	5,301,277	4,113,424	1,187,853
2008	5,378,921	4,180,786	1,198,135
2009	5,569,078	4,499,045	1,070,033
<i>Blind</i>			
1974	125,791	91,308	34,483
1975	127,240	92,427	34,813
1980	185,827	131,506	54,321
1985	259,840	195,183	64,657
1990	328,949	238,415	90,534
1995	367,441	298,238	69,203
2000	385,927	312,238	73,688
2001	398,624	323,895	74,729
2002	416,454	335,405	81,049
2003	409,293	325,878	83,415
2004	412,414	327,446	85,364
2005	414,147	330,591	83,556
2006	409,287	326,230	83,057
2007	418,835	336,789	82,046
2008	416,017	335,179	80,838
2009	426,533	354,817	71,716

(Continued)

Table 7.A4—Total federally administered payments, by eligibility category, selected years 1974–2009
(in thousands of dollars)—*Continued*

Year	Total	Federal SSI	Federally administered state supplementation
		<i>Disabled</i>	
1974	2,556,988	1,959,112	597,876
1975	3,072,317	2,378,131	694,186
1980	4,911,792	3,874,655	1,037,137
1985	7,593,427	6,379,601	1,213,826
1990	12,244,622	10,134,007	2,110,615
1995	22,430,612	20,246,415	2,184,197
2000	25,745,710	23,380,477	2,365,233
2001	27,125,707	24,695,630	2,430,077
2002	28,499,771	25,811,887	2,687,884
2003	29,429,428	26,606,400	2,823,028
2004	30,745,406	27,785,246	2,960,160
2005	31,857,069	28,890,840	2,966,229
2006	33,363,762	30,456,751	2,907,011
2007	35,484,533	32,433,853	3,050,680
2008	37,245,543	34,139,815	3,105,728
2009	40,596,703	37,774,847	2,821,857

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

CONTACT: Stella M. Coleman (410) 965-0157 or supplement@ssa.gov.

7.A SSI: Summary

Table 7.A5—Average monthly federally administered payment, by eligibility category, December 1975–2009, selected years (in dollars)

Year	Total	Federal SSI	Federally administered state supplementation
<i>All recipients</i>			
1975	106.33	90.59	61.72
1980	161.92	138.14	95.17
1985	218.09	193.77	99.39
1990	276.45	241.52	127.83
1995	335.45	312.83	98.66
2000	378.82	351.48	112.50
2001	393.96	366.31	113.65
2002	407.42	376.76	127.53
2003	417.16	383.59	138.38
2004	428.29	395.36	138.07
2005	439.09	406.50	156.30
2006	454.75	423.05	156.24
2007	468.36	437.05	156.56
2008	477.79	447.00	156.23
2009	498.75	476.33	124.96
<i>Aged</i>			
1975	86.72	73.77	57.38
1980	126.66	105.69	95.60
1985	164.01	141.41	103.58
1990	208.26	170.74	136.31
1995	250.27	220.15	109.62
2000	299.69	258.12	128.46
2001	314.22	271.13	130.89
2002	330.04	280.86	146.17
2003	342.28	287.10	160.02
2004	350.53	295.13	160.44
2005	360.25	303.29	170.39
2006	373.05	316.48	170.64
2007	384.15	327.06	171.69
2008	393.46	336.03	172.29
2009	399.14	357.86	134.96
<i>Blind</i>			
1975	137.58	112.69	78.57
1980	192.51	163.36	111.41
1985	260.25	224.31	122.15
1990	319.03	267.34	167.29
1995	355.24	317.06	138.31
2000	413.22	360.51	171.01
2001	428.04	374.72	173.98
2002	444.54	384.79	194.31
2003	454.85	389.20	210.51
2004	463.44	398.15	210.69
2005	474.62	407.87	229.41
2006	488.42	423.15	228.97
2007	500.22	435.15	229.27
2008	507.66	442.42	229.60
2009	520.30	470.63	189.20

(Continued)

Table 7.A5—Average monthly federally administered payment, by eligibility category, December 1975–2009, selected years (in dollars)—Continued

Year	Total	Federal SSI	Federally administered state supplementation
		<i>Disabled</i>	
1975	128.49	108.55	65.68
1980	188.70	160.78	94.38
1985	246.50	219.61	96.63
1990	302.78	266.84	123.36
1995	358.18	336.39	94.26
2000	397.92	373.41	105.86
2001	412.46	387.80	106.72
2002	424.75	397.71	119.94
2003	433.16	403.76	129.89
2004	444.40	415.59	129.51
2005	455.13	426.95	149.80
2006	471.00	443.61	149.71
2007	484.67	457.67	149.87
2008	493.70	467.24	149.33
2009	516.93	497.26	120.48

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: Excludes retroactive payments.

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

7.A SSI: Summary

Table 7.A8—Number of federally administered awards, by eligibility category and age, 1974–2009

Year	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older
All awards	29,982,268	7,901,732	315,356	21,765,180	4,082,048	17,840,394	8,059,826
State conversions ^a	3,155,995	1,765,946	76,560	1,313,489	2,748	1,299,343	1,853,904
Federal applications							
1974	1,336,164	771,459	8,072	556,633	66,699	493,511	775,954
1975	929,369	350,918	8,656	569,795	63,060	509,271	357,038
1976	667,994	217,852	7,197	442,945	46,114	400,314	221,566
1977	642,712	211,716	7,919	423,077	50,883	377,454	214,375
1978	563,117	192,927	7,696	362,494	46,520	321,413	195,184
1979	517,446	176,739	7,784	332,923	44,911	293,910	178,625
1980	523,758	184,399	8,819	330,540	45,781	292,080	185,897
1981	409,992	121,655	8,017	280,320	39,106	248,105	122,781
1982	343,928	104,207	6,733	232,988	35,410	203,335	105,183
1983	453,789	151,406	7,985	294,398	42,154	259,042	152,593
1984	585,832	215,898	8,390	361,544	45,766	322,858	217,208
1985	526,418	153,962	8,176	364,280	46,362	324,933	155,123
1986	603,989	161,781	7,850	434,358	50,632	390,499	162,858
1987	589,053	166,775	7,468	414,810	48,292	372,914	167,847
1988	578,748	167,051	7,027	404,670	47,798	362,903	168,047
1989	630,486	187,594	7,026	435,866	50,985	390,703	188,798
1990	718,917	191,809	7,458	519,650	77,923	447,849	193,145
1991	821,396	188,014	7,592	625,790	125,874	506,177	189,345
1992	1,054,441	190,190	7,925	856,326	221,362	641,750	191,329
1993	1,052,415	185,546	7,106	859,763	236,564	629,246	186,605
1994	943,889	158,603	6,379	778,907	203,688	580,253	159,948
1995	888,633	143,099	5,480	740,054	175,784	568,072	144,777
1996	797,137	125,660	5,293	666,184	144,404	525,350	127,383
1997	676,444	94,764	5,078	576,602	117,090	463,444	95,910
1998	743,121	111,325	6,330	625,466	136,383	490,638	116,100
1999	758,076	120,403	5,906	631,767	140,520	494,609	122,947
2000	750,163	117,567	5,879	626,717	144,136	485,798	120,229
2001	772,775	108,877	5,946	657,952	156,844	504,366	111,565
2002	820,992	113,286	5,753	701,953	170,048	535,507	115,437
2003	827,029	106,484	5,317	715,228	179,566	539,127	108,336
2004	852,052	105,605	5,213	741,234	183,152	561,487	107,413
2005	852,222	111,940	4,881	735,401	177,688	560,960	113,574
2006	838,448	110,264	4,151	724,033	170,453	556,140	111,855
2007	836,642	102,581	3,492	730,569	169,375	563,094	104,173
2008	919,146	106,513	3,987	808,646	181,228	629,697	108,221
2009	999,540	106,917	4,815	887,808	196,745	694,242	108,553

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: Represents period in which first payment was made, not date of entitlement to payments.

a. Persons who were converted in 1973 from the state Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled programs to the SSI program.

CONTACT: Clark Pickett (410) 965-9016 or supplement@ssa.gov.

Table 7.A9—Number of recipients of federally administered payments, by eligibility category and age, December 1974–2009

Year	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older
1974	3,996,064	2,285,909	74,616	1,635,539	70,900	1,503,155	2,422,009
1975	4,314,275	2,307,105	74,489	1,932,681	107,026	1,699,394	2,507,855
1976	4,235,939	2,147,697	76,366	2,011,876	125,412	1,713,594	2,396,933
1977	4,237,692	2,050,921	77,362	2,109,409	147,355	1,736,879	2,353,458
1978	4,216,925	1,967,900	76,895	2,171,890	165,899	1,747,126	2,303,900
1979	4,149,575	1,871,716	77,250	2,200,609	177,306	1,726,553	2,245,716
1980	4,142,017	1,807,776	78,401	2,255,840	190,394	1,730,847	2,220,776
1981	4,018,875	1,678,090	78,570	2,262,215	194,890	1,702,895	2,121,090
1982	3,857,590	1,548,741	77,356	2,231,493	191,570	1,655,279	2,010,741
1983	3,901,497	1,515,400	78,960	2,307,137	198,323	1,699,774	2,003,400
1984	4,029,333	1,530,287	80,524	2,418,522	211,587	1,780,459	2,037,287
1985	4,138,021	1,504,469	82,220	2,551,332	227,384	1,879,168	2,031,469
1986	4,269,184	1,473,428	83,115	2,712,641	241,198	2,010,458	2,017,528
1987	4,384,999	1,455,387	83,421	2,846,191	250,902	2,118,710	2,015,387
1988	4,463,869	1,433,420	82,864	2,947,585	255,135	2,202,714	2,006,020
1989	4,593,059	1,439,043	82,765	3,071,251	264,890	2,301,926	2,026,243
1990	4,817,127	1,454,041	83,686	3,279,400	308,589	2,449,897	2,058,641
1991	5,118,470	1,464,684	84,549	3,569,237	397,162	2,641,524	2,079,784
1992	5,566,189	1,471,022	85,400	4,009,767	556,470	2,910,016	2,099,703
1993	5,984,330	1,474,852	85,456	4,424,022	722,678	3,148,413	2,113,239
1994	6,295,786	1,465,905	84,911	4,744,970	841,474	3,335,255	2,119,057
1995	6,514,134	1,446,122	83,545	4,984,467	917,048	3,482,256	2,114,830
1996	6,613,718	1,412,632	82,137	5,118,949	955,174	3,568,393	2,090,151
1997	6,494,985	1,362,350	80,778	5,051,857	879,828	3,561,625	2,053,532
1998	6,566,069	1,331,782	80,243	5,154,044	887,066	3,646,020	2,032,983
1999	6,556,634	1,308,062	79,291	5,169,281	847,063	3,690,970	2,018,601
2000	6,601,686	1,289,339	78,511	5,233,836	846,784	3,744,022	2,010,880
2001	6,688,489	1,264,463	78,255	5,345,771	881,836	3,811,494	1,995,159
2002	6,787,857	1,251,528	77,658	5,458,671	914,821	3,877,752	1,995,284
2003	6,902,364	1,232,778	77,082	5,592,504	959,379	3,953,248	1,989,737
2004	6,987,845	1,211,167	75,924	5,700,754	993,127	4,017,108	1,977,610
2005	7,113,879	1,214,296	75,039	5,824,544	1,036,498	4,082,870	1,994,511
2006	7,235,583	1,211,656	73,418	5,950,509	1,078,977	4,152,130	2,004,476
2007	7,359,525	1,204,512	71,727	6,083,286	1,121,017	4,221,920	2,016,588
2008	7,520,501	1,203,256	70,325	6,246,920	1,153,844	4,333,096	2,033,561
2009	7,676,686	1,185,959	69,302	6,421,425	1,199,788	4,451,288	2,025,610

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

7.B SSI: State Data

Table 7.B1—Number of recipients of federally administered payments, December 2009, and total payments for calendar year 2009, by state or other area and eligibility category

State or area	Number				Total payments (thousands of dollars) ^a			
	Total	Aged	Blind ^b	Disabled ^c	Total	Aged	Blind	Disabled
All areas ^d	7,676,686	1,185,959	69,302	6,421,425	46,592,308	5,569,078	426,533	40,596,703
Alabama	169,320	13,373	848	155,099	960,005	33,705	4,198	922,102
Alaska	12,006	1,977	97	9,932	67,440	7,286	519	59,634
Arizona	106,130	14,024	866	91,240	612,170	55,927	4,725	551,518
Arkansas	102,927	7,321	709	94,897	572,704	16,594	3,448	552,662
California	1,250,030	358,891	19,706	871,433	9,082,274	2,251,892	155,631	6,674,752
Colorado	61,951	9,048	491	52,412	349,825	37,596	2,602	309,627
Connecticut	56,270	6,696	432	49,142	325,218	29,236	2,384	293,599
Delaware	15,299	1,284	93	13,922	86,510	4,538	507	81,466
District of Columbia	23,575	1,907	126	21,542	143,189	7,054	699	135,437
Florida	463,573	106,216	2,695	354,662	2,595,668	459,761	13,994	2,121,912
Georgia	220,238	24,939	1,913	193,386	1,264,015	77,327	10,040	1,176,648
Hawaii	24,266	6,151	176	17,939	151,379	30,526	1,111	119,743
Idaho	26,048	1,862	197	23,989	145,631	5,628	1,022	138,980
Illinois	269,392	30,588	2,340	236,464	1,621,736	138,064	13,271	1,470,400
Indiana	112,791	5,599	853	106,339	673,252	17,910	4,445	650,896
Iowa	46,609	3,313	708	42,588	256,272	9,758	3,552	242,962
Kansas	44,045	3,125	343	40,577	260,049	10,827	1,836	247,387
Kentucky	189,482	11,486	1,261	176,735	1,076,749	30,308	6,651	1,039,790
Louisiana	169,690	14,710	1,466	153,514	947,234	40,377	7,589	899,269
Maine	34,559	2,048	215	32,296	188,521	5,231	1,128	182,162
Maryland	102,930	14,986	572	87,372	622,891	65,985	3,090	553,817
Massachusetts	186,609	46,354	3,599	136,656	1,152,092	233,729	23,253	895,110
Michigan	242,983	16,404	1,583	224,996	1,479,092	65,537	8,591	1,404,964
Minnesota	83,246	10,360	703	72,183	488,129	47,613	3,979	436,538
Mississippi	124,116	11,585	881	111,650	681,440	27,433	4,216	649,791
Missouri	128,132	8,194	911	119,027	738,140	26,257	4,798	707,085
Montana	16,694	1,043	122	15,529	91,829	2,742	618	88,469
Nebraska	24,616	1,971	232	22,413	136,140	6,290	1,246	128,604
Nevada	38,592	9,653	647	28,292	218,295	40,116	4,136	174,041
New Hampshire	16,628	869	161	15,598	93,240	3,157	831	89,252
New Jersey	163,066	34,201	869	127,996	957,427	160,262	4,623	792,541
New Mexico	59,110	8,304	455	50,351	326,987	27,579	2,473	296,935
New York	667,893	132,643	2,865	532,385	4,335,563	670,587	17,269	3,647,708
North Carolina	213,329	21,501	1,690	190,138	1,187,361	58,077	8,612	1,120,672
North Dakota	8,139	814	70	7,255	40,902	2,476	323	38,104
Ohio	273,881	14,882	1,728	257,271	1,694,864	56,281	9,183	1,629,400
Oklahoma	90,745	6,810	709	83,226	515,321	19,814	3,775	491,731
Oregon	70,404	8,389	625	61,390	405,574	33,180	3,483	368,911
Pennsylvania	346,951	26,266	1,988	318,697	2,142,123	103,873	10,952	2,027,299
Rhode Island	31,582	3,559	165	27,858	188,980	14,749	883	173,350
South Carolina	109,339	10,029	1,264	98,046	617,298	26,907	6,424	583,967
South Dakota	13,542	1,525	99	11,918	70,565	4,378	545	65,643
Tennessee	169,325	14,083	1,454	153,788	967,111	37,398	7,999	921,714
Texas	589,929	106,947	6,653	476,329	3,126,279	363,034	35,761	2,727,484
Utah	26,604	2,455	224	23,925	150,696	10,497	1,194	139,004
Vermont	14,690	1,024	69	13,597	82,239	2,883	387	78,969
Virginia	144,278	19,421	1,153	123,704	789,610	75,454	6,031	708,125
Washington	130,707	15,929	874	113,904	817,634	78,171	4,945	734,518
West Virginia	79,847	3,301	523	76,023	461,631	8,535	2,774	450,322
Wisconsin	103,503	7,431	830	95,242	594,237	25,105	4,552	564,581
Wyoming	6,168	343	39	5,786	33,051	872	181	31,998
Outlying area								
Northern Mariana Islands	906	125	10	771	5,726	562	54	5,109

SOURCE: Social Security Administration, Office of Budget, Finance and Management; and Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

- a. Totals do not necessarily equal the sum of rounded components.
- b. Includes approximately 14,900 blind persons aged 65 or older.
- c. Includes approximately 824,700 disabled persons aged 65 or older.
- d. Includes data not distributed by state.

CONTACT: Art Kahn (410) 965-0186, Stella M. Coleman (410) 965-0157, or supplement@ssa.gov.

Table 7.B3—Number of recipients of federally administered payments and average monthly payment, by state or other area, December 2009

State or area	Federal SSI		State supplementation	
	Number	Average monthly payment (dollars)	Number	Average monthly payment (dollars)
All areas ^a	7,422,879	476.33	2,339,346	124.96
Alabama	169,320	459.51	...	...
Alaska	12,006	464.42	...	...
Arizona	106,130	488.65	...	...
Arkansas	102,927	459.86	...	...
California	1,074,455	479.72	1,249,001	167.51
Colorado	61,950	462.06	...	...
Connecticut	56,270	480.73	...	...
Delaware	15,177	478.24	684	125.52
District of Columbia	23,453	511.16	1,444	249.52
Florida	463,572	473.74	...	...
Georgia	220,237	460.05	...	...
Hawaii	23,176	484.55	2,638	509.27
Idaho	26,048	466.73	...	...
Illinois	269,392	504.06	...	...
Indiana	112,791	483.17	...	...
Iowa	46,149	448.97	2,009	221.23
Kansas	44,045	465.93	...	...
Kentucky	189,482	474.39	...	...
Louisiana	169,689	475.85	...	...
Maine	34,559	445.64	...	...
Maryland	102,930	493.72	...	...
Massachusetts	171,137	477.46	186,343	79.66
Michigan	240,237	502.66	14,930	120.96
Minnesota	83,246	485.45	...	...
Mississippi	124,115	453.21	...	...
Missouri	128,132	467.34	...	...
Montana	16,625	454.50	1,025	81.06
Nebraska	24,616	448.17	...	...
Nevada	37,924	476.78	10,253	49.25
New Hampshire	16,628	461.33	...	...
New Jersey	156,328	463.45	162,487	45.97
New Mexico	59,110	461.08	...	...
New York	623,621	492.35	649,665	77.67
North Carolina	213,329	446.45	...	...
North Dakota	8,139	418.03	...	...
Ohio	273,881	497.95	...	...
Oklahoma	90,745	471.34	...	...
Oregon	70,404	479.65	...	...
Pennsylvania	343,136	502.62	9,710	358.54
Rhode Island	29,988	478.88	31,542	45.91
South Carolina	109,339	451.99	...	...
South Dakota	13,542	436.02	...	...
Tennessee	169,324	458.85	...	...
Texas	589,929	451.50	...	...
Utah	26,601	471.75	2,359	2.77

(Continued)

7.B SSI: State Data

Table 7.B3—Number of recipients of federally administered payments and average monthly payment, by state or other area, December 2009—Continued

State or area	Federal SSI		State supplementation	
	Number	Average monthly payment (dollars)	Number	Average monthly payment (dollars)
Vermont	13,635	445.37	14,656	53.86
Virginia	144,278	461.29	...	...
Washington	130,707	505.18	...	...
West Virginia	79,847	482.04	...	...
Wisconsin	103,503	476.44	...	...
Wyoming	6,168	447.31	...	...
Outlying area				
Northern Mariana Islands	906	559.16	...	...

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: ... = not applicable.

a. Includes recipients and payments not assigned to a specific state or other area.

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

Table 7.B7—Total federally administered payments, by state or other area, 2009 (in thousands of dollars)

State or area	Total	Federal SSI	Federally administered state supplementation
All areas	46,592,308	42,628,706	3,963,602
Alabama	960,005	960,005	...
Alaska	67,440	67,440	...
Arizona	612,170	612,170	...
Arkansas	572,704	572,704	...
California	9,082,274	6,125,159	2,957,115
Colorado	349,825	349,825	...
Connecticut	325,218	325,218	...
Delaware	86,510	85,517	993
District of Columbia	143,189	139,028	4,161
Florida	2,595,668	2,595,668	...
Georgia	1,264,015	1,264,015	...
Hawaii	151,379	135,414	15,965
Idaho	145,631	145,631	...
Illinois	1,621,736	1,621,736	...
Indiana	673,252	673,252	...
Iowa	256,272	251,102	5,170
Kansas	260,049	260,049	...
Kentucky	1,076,749	1,076,749	...
Louisiana	947,234	947,234	...
Maine	188,521	188,521	...
Maryland	622,891	622,891	...
Massachusetts	1,152,092	972,683	179,409
Michigan	1,479,092	1,457,653	21,439
Minnesota	488,129	488,129	...
Mississippi	681,440	681,440	...
Missouri	738,140	738,140	...
Montana	91,829	90,841	988
Nebraska	136,140	136,140	...
Nevada	218,295	212,271	6,024
New Hampshire	93,240	93,240	...
New Jersey	957,427	867,099	90,328
New Mexico	326,987	326,987	...
New York	4,335,563	3,722,605	612,958
North Carolina	1,187,361	1,187,361	...
North Dakota	40,902	40,902	...
Ohio	1,694,864	1,694,864	...
Oklahoma	515,321	515,321	...
Oregon	405,574	405,574	...
Pennsylvania	2,142,123	2,100,476	41,647
Rhode Island	188,980	171,296	17,684
South Carolina	617,298	617,298	...
South Dakota	70,565	70,565	...
Tennessee	967,111	967,111	...
Texas	3,126,279	3,126,279	...
Utah	150,696	150,616	80
Vermont	82,239	72,598	9,641
Virginia	789,610	789,610	...
Washington	817,634	817,634	...
West Virginia	461,631	461,631	...
Wisconsin	594,237	594,237	...
Wyoming	33,051	33,051	...
Outlying area			
Northern Mariana Islands	5,726	5,726	...

SOURCE: Social Security Administration, Office of Budget, Finance and Management; and Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: ... = not applicable.

CONTACT: Stella M. Coleman (410) 965-0157 or supplement@ssa.gov.

7.B SSI: State Data

Table 7.B8—Number of blind and disabled recipients of federally administered payments under age 18, by state or other area, December 2009

State or area	Total	Blind	Disabled
All areas	1,199,788	5,931	1,193,857
Alabama	29,956	33	29,923
Alaska	1,264	a	a
Arizona	19,943	91	19,852
Arkansas	25,203	66	25,137
California	109,409	1,260	108,149
Colorado	8,120	38	8,082
Connecticut	7,603	23	7,580
Delaware	3,567	5	3,562
District of Columbia	4,485	5	4,480
Florida	88,993	153	88,840
Georgia	39,211	223	38,988
Hawaii	1,697	22	1,675
Idaho	5,085	18	5,067
Illinois	45,232	202	45,030
Indiana	24,832	71	24,761
Iowa	7,903	75	7,828
Kansas	8,335	23	8,312
Kentucky	30,326	97	30,229
Louisiana	34,238	81	34,157
Maine	3,867	25	3,842
Maryland	16,435	31	16,404
Massachusetts	21,880	385	21,495
Michigan	40,840	120	40,720
Minnesota	12,620	61	12,559
Mississippi	23,867	54	23,813
Missouri	21,796	76	21,720
Montana	2,436	15	2,421
Nebraska	4,010	25	3,985
Nevada	7,232	87	7,145
New Hampshire	2,274	24	2,250
New Jersey	24,351	44	24,307
New Mexico	8,917	34	8,883
New York	80,169	156	80,013
North Carolina	41,328	147	41,181
North Dakota	1,084	a	a
Ohio	47,459	141	47,318
Oklahoma	17,094	67	17,027
Oregon	9,403	61	9,342
Pennsylvania	67,969	122	67,847
Rhode Island	4,361	6	4,355
South Carolina	20,100	139	19,961
South Dakota	2,328	7	2,321
Tennessee	24,782	138	24,644
Texas	120,467	1,217	119,250
Utah	5,093	25	5,068
Vermont	1,805	9	1,796
Virginia	23,542	64	23,478
Washington	16,719	71	16,648
West Virginia	9,277	42	9,235
Wisconsin	19,681	44	19,637
Wyoming	903	a	a
Outlying area			
Northern Mariana Islands	297	a	a

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

a. Suppressed to avoid disclosing information about particular individuals.

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

Table 7.B9—Number of federally administered awards, by state or other area, eligibility category, and age, 2009

State or area	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older
All areas	999,540	106,917	4,815	887,808	196,745	694,242	108,553
Alabama	23,214	845	53	22,316	4,346	17,995	873
Alaska	1,875	^a	^a	1,686	304	1,381	190
Arizona	14,195	1,489	107	12,599	3,253	9,433	1,509
Arkansas	16,791	494	56	16,241	4,881	11,407	503
California	118,060	32,641	880	84,539	17,936	67,171	32,953
Colorado	9,230	1,019	38	8,173	1,486	6,714	1,030
Connecticut	6,816	685	21	6,110	1,277	4,848	691
Delaware	2,528	159	5	2,364	556	1,810	162
District of Columbia	3,588	212	13	3,363	722	2,651	215
Florida	68,727	11,255	276	57,196	15,262	42,099	11,366
Georgia	33,912	2,319	170	31,423	5,817	25,682	2,413
Hawaii	3,373	624	10	2,739	338	2,410	625
Idaho	4,288	232	14	4,042	1,041	3,013	234
Illinois	31,372	2,797	225	28,350	6,361	22,169	2,842
Indiana	19,047	687	76	18,284	4,020	14,322	705
Iowa	6,754	340	51	6,363	1,424	4,985	345
Kansas	8,447	360	25	8,062	1,582	6,495	370
Kentucky	21,848	972	83	20,793	4,253	16,599	996
Louisiana	20,933	977	95	19,861	4,894	15,042	997
Maine	3,993	165	11	3,817	683	3,142	168
Maryland	14,973	1,238	53	13,682	2,763	10,936	1,274
Massachusetts	22,234	2,651	161	19,422	3,854	15,713	2,667
Michigan	38,393	1,846	131	36,416	7,042	29,430	1,921
Minnesota	11,672	944	30	10,698	2,245	8,476	951
Mississippi	15,906	743	58	15,105	3,521	11,621	764
Missouri	20,030	755	80	19,195	3,485	15,770	775
Montana	2,771	135	10	2,626	482	2,150	139
Nebraska	4,204	252	21	3,931	806	3,142	256
Nevada	6,601	968	46	5,587	1,386	4,240	975
New Hampshire	3,276	100	15	3,161	403	2,771	102
New Jersey	21,451	3,452	62	17,937	4,164	13,794	3,493
New Mexico	7,493	753	32	6,708	1,553	5,176	764
New York	68,332	10,730	191	57,411	13,299	44,153	10,880
North Carolina	31,861	1,957	157	29,747	5,995	23,830	2,036
North Dakota	1,122	^a	^a	1,029	204	826	92
Ohio	38,154	1,411	150	36,593	7,294	29,400	1,460
Oklahoma	13,409	686	39	12,684	2,959	9,749	701
Oregon	11,023	1,030	37	9,956	1,777	8,199	1,047
Pennsylvania	41,770	2,578	119	39,073	10,664	28,480	2,626
Rhode Island	3,378	334	9	3,035	717	2,321	340
South Carolina	16,731	745	112	15,874	2,963	12,983	785
South Dakota	1,875	167	12	1,696	415	1,290	170
Tennessee	25,403	1,319	90	23,994	3,881	20,173	1,349
Texas	88,825	8,728	683	79,414	21,441	58,510	8,874
Utah	4,457	284	9	4,164	987	3,182	288
Vermont	1,887	119	0	1,768	293	1,474	120
Virginia	19,030	1,790	122	17,118	3,433	13,784	1,813
Washington	19,650	1,698	78	17,874	3,155	14,771	1,724
West Virginia	7,407	235	30	7,142	1,308	5,855	244
Wisconsin	15,930	655	62	15,213	3,589	11,670	671
Wyoming	1,155	^a	^a	1,123	176	948	31
Outlying area							
Northern Mariana Islands	143	^a	^a	108	52	57	34
Unknown	3	0	0	3	3	0	0

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

a. Suppressed to avoid disclosing information about particular individuals.

CONTACT: Clark Pickett (410) 965-9016 or supplement@ssa.gov.

7.C SSI: Benefit Distributions

Table 7.C1—Number and percentage distribution of adult individuals and persons under age 18 receiving federal SSI payments, by monthly payment and eligibility category, December 2009

Monthly payment (dollars)	All recipients	Adults			Blind and disabled, under age 18
		Aged	Blind	Disabled	
Total					
Number	6,902,166	858,579	55,658	4,789,727	1,198,202
Percent	100.0	100.0	100.0	100.0	100.0
Less than 50	6.9	11.0	8.0	7.3	1.9
50–99	4.6	8.6	5.0	4.8	0.8
100–149	4.4	8.4	4.8	4.5	1.0
150–199	3.7	7.4	3.8	3.7	1.2
200–249	3.3	5.8	3.6	3.3	1.3
250–299	3.2	4.5	4.1	3.4	1.6
300–349	2.7	3.9	2.8	2.7	1.8
350–399	2.5	3.4	2.6	2.4	2.1
400–449	7.9	12.0	9.0	7.4	7.1
450–499	2.0	2.2	1.9	1.7	3.2
500–549	1.8	1.6	1.8	1.3	3.9
550–599	1.9	1.1	1.3	1.2	5.3
600–649	1.8	0.8	1.1	1.2	5.2
650–673	0.9	0.3	0.5	0.6	2.4
674 ^a	52.4	29.2	49.6	54.4	61.2

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

a. Individuals living in their own household with no countable income were eligible for a federal SSI payment of \$674 in calendar year 2009.

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

Table 7.C2—Number and percentage distribution of couples receiving federal SSI payments, by monthly payment and eligibility category, December 2009

Monthly payment (dollars)	All recipients	Aged	Blind	Disabled
Total				
Number	260,598	122,078	2,315	136,205
Percent	100.0	100.0	100.0	100.0
Less than 50	3.2	3.4	2.9	3.1
50–99	3.7	3.9	2.5	3.6
100–149	3.9	4.0	3.0	3.8
150–199	4.0	4.1	3.5	3.9
200–249	3.8	3.8	3.8	3.8
250–299	3.7	3.6	2.7	3.8
300–349	3.5	3.0	2.7	4.0
350–399	3.4	2.8	3.1	4.0
400–449	3.0	2.6	3.4	3.4
450–499	2.8	2.5	2.8	3.1
500–549	2.3	2.3	2.2	2.4
550–599	2.1	2.1	2.2	2.2
600–649	2.1	2.0	2.0	2.2
650–699	6.4	10.1	4.2	3.1
700–749	1.6	1.5	1.9	1.8
750–799	1.4	1.2	2.0	1.6
800–849	1.1	1.0	1.7	1.2
850–899	0.9	0.9	1.0	0.8
900–949	0.7	0.9	0.8	0.6
950–999	0.8	1.0	0.5	0.6
1,000–1,010	0.1	0.2	0.0	0.1
1,011 ^a	45.2	43.2	51.0	46.9

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

a. Couples living in their own household with no countable income were eligible for a federal SSI payment of \$1,011 in calendar year 2009.

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

Table 7.D1—Persons receiving federally administered payments and other income and their average monthly income, by type of income, eligibility category, and age, December 2009

Type of income	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older ^a
Number	7,676,686	1,185,959	69,302	6,421,425	1,199,788	4,451,288	2,025,610
Number							
With unearned income							
Social Security benefits	2,621,649	666,201	25,525	1,929,923	87,207	1,399,368	1,135,074
Other	828,127	196,307	6,441	625,379	236,559	328,226	263,342
With earned income	264,180	17,172	3,587	243,421	2,431	234,485	27,264
Percentage							
With unearned income							
Social Security benefits	34.2	56.2	36.8	30.1	7.3	31.4	56.0
Other	10.8	16.6	9.3	9.7	19.7	7.4	13.0
With earned income	3.4	1.4	5.2	3.8	0.2	5.3	1.3
Average income (dollars)							
With unearned income							
Social Security benefits	490.80	479.19	504.76	494.66	215.91	515.39	481.79
Other	158.17	132.23	141.26	166.57	201.72	150.82	128.11
With earned income	294.67	395.67	460.02	285.05	315.68	293.62	301.78

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: See section History of Provisions: SSI for discussion of income.

a. Includes approximately 14,900 blind and 824,700 disabled persons aged 65 or older.

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

7.D SSI: Other Income Sources

Table 7.D2—Percentage of persons receiving both federally administered payments and Social Security benefits, and average monthly amount of benefits, by state or other area, eligibility category, and age, December 2009

State or area	Percentage with Social Security benefits							Average monthly Social Security benefit (dollars)						
	Total	Category			Age			Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older		Aged	Blind	Disabled	Under 18	18–64	65 or older
All areas	34.2	56.2	36.8	30.1	7.3	31.4	56.0	490.80	479.19	504.76	494.66	215.91	515.39	481.79
Alabama	37.7	85.6	43.9	33.5	9.3	34.5	76.7	482.86	498.37	465.05	479.55	220.18	499.58	487.41
Alaska	34.1	64.0	44.3	28.0	7.5	27.5	61.3	475.78	478.46	448.07	474.97	227.19	494.15	467.97
Arizona	31.8	59.1	35.0	27.5	6.7	28.9	58.4	456.53	428.66	448.54	465.90	215.14	493.99	433.99
Arkansas	37.0	88.2	43.3	33.0	9.2	36.8	80.8	480.30	509.41	465.49	474.41	202.77	499.79	495.88
California	37.9	49.9	37.3	32.9	5.0	33.7	49.2	539.43	491.14	580.09	568.73	251.63	591.57	505.83
Colorado	35.1	52.3	36.7	32.1	5.1	33.5	55.6	484.91	472.71	465.80	488.57	227.95	501.93	471.36
Connecticut	31.4	46.0	33.8	29.3	7.3	30.0	48.6	464.60	442.34	462.71	469.42	204.76	487.39	449.74
Delaware	31.1	59.4	38.7	28.4	6.9	32.2	61.1	487.79	485.20	481.57	488.36	216.37	513.07	483.26
District of Columbia	23.9	64.7	34.1	20.2	5.7	19.7	58.3	482.94	466.81	495.25	487.43	258.47	514.59	468.33
Florida	32.8	49.0	38.1	27.9	7.0	30.8	50.6	460.84	443.88	460.67	469.87	222.22	497.88	447.93
Georgia	35.1	70.5	35.9	30.6	6.3	31.1	68.4	490.55	494.40	466.09	489.68	229.47	508.37	488.35
Hawaii	33.1	49.8	31.3	27.4	6.7	25.6	50.7	517.58	484.66	598.31	537.30	254.67	561.39	488.32
Idaho	35.3	74.8	39.1	32.2	8.6	35.3	72.3	481.10	501.72	454.59	477.57	198.54	498.46	487.51
Illinois	26.1	44.0	28.5	23.7	6.6	24.9	44.2	459.20	436.56	438.68	464.90	209.34	480.90	453.60
Indiana	31.5	69.4	37.0	29.5	7.8	33.4	66.9	479.44	487.32	461.45	478.64	202.69	498.91	485.49
Iowa	38.2	73.4	40.8	35.5	7.6	38.9	70.3	491.02	506.54	478.00	488.74	207.41	502.24	498.27
Kansas	35.0	63.4	32.4	32.9	8.1	36.3	63.5	488.22	488.32	475.30	488.31	208.12	507.07	486.66
Kentucky	34.6	81.4	37.0	31.6	9.8	30.9	72.5	469.81	493.45	454.58	465.97	199.59	489.20	471.72
Louisiana	33.0	81.3	39.4	28.3	7.3	28.7	73.1	466.18	482.43	463.45	461.74	225.15	481.82	472.04
Maine	42.7	83.8	42.8	40.1	15.9	39.4	78.6	483.15	509.03	502.77	479.58	189.44	496.09	495.25
Maryland	27.7	43.5	35.8	25.0	6.3	25.8	46.7	473.79	454.22	471.11	479.71	234.41	496.66	464.18
Massachusetts	36.2	52.4	41.7	30.6	11.4	34.1	51.9	523.64	524.20	546.81	522.47	199.85	542.95	525.79
Michigan	31.7	53.2	37.4	30.1	8.3	32.0	55.4	485.25	486.46	463.62	485.28	203.56	501.48	490.11
Minnesota	31.3	43.3	29.7	29.6	7.8	32.9	43.0	475.21	478.73	459.23	474.62	192.85	491.35	475.56
Mississippi	38.5	89.3	47.1	33.2	8.5	33.8	78.9	478.44	497.60	471.34	473.15	233.10	494.46	483.05
Missouri	35.6	70.9	41.8	33.1	8.9	35.1	68.2	476.96	491.75	457.94	474.96	204.29	492.20	481.97
Montana	38.1	80.6	36.1	35.2	7.2	36.6	74.4	498.84	506.21	503.61	497.66	240.56	510.27	497.70
Nebraska	38.3	69.8	36.2	35.5	7.2	39.0	67.2	491.72	500.06	438.17	490.84	225.73	503.04	492.76
Nevada	31.6	57.5	33.4	22.7	5.6	28.3	56.7	496.71	499.60	536.60	492.83	228.19	513.27	498.64
New Hampshire	36.6	60.4	34.2	35.3	16.6	36.0	64.1	473.61	454.91	464.21	475.48	195.48	495.09	481.26
New Jersey	31.8	43.1	41.5	28.7	6.4	30.2	46.0	486.09	457.88	493.04	497.38	230.48	519.52	467.29
New Mexico	37.8	73.6	34.7	31.9	7.2	31.3	68.5	458.00	444.05	444.79	463.45	221.52	485.70	444.90
New York	33.3	51.0	39.4	28.9	6.3	29.5	48.3	515.53	484.74	527.45	529.02	216.09	554.32	493.21
North Carolina	38.1	80.3	39.2	33.3	7.7	34.9	75.2	483.63	501.25	460.05	479.04	228.87	499.01	487.59
North Dakota	42.5	74.2	47.1	38.9	6.5	40.9	71.5	478.19	484.44	442.35	477.24	185.78	489.21	474.83
Ohio	29.1	57.9	34.5	27.4	7.0	29.1	56.7	468.28	471.26	449.58	468.07	204.31	482.68	472.34
Oklahoma	33.8	78.3	35.3	30.1	8.2	31.4	72.9	469.96	485.71	454.59	466.74	217.32	486.30	475.16
Oregon	33.8	56.0	35.0	30.8	6.5	32.0	57.4	485.85	471.90	462.51	489.65	238.83	502.10	475.34
Pennsylvania	28.8	59.9	36.9	26.2	8.4	27.5	56.1	477.14	504.80	473.28	471.94	199.36	493.09	495.57
Rhode Island	36.9	63.5	42.4	33.5	8.9	34.5	61.3	511.09	530.86	535.37	506.09	195.20	525.24	515.94
South Carolina	37.1	84.1	40.2	32.2	6.9	32.9	75.9	480.85	487.77	495.06	478.76	224.32	497.62	480.33
South Dakota	38.4	62.1	30.3	35.4	6.0	38.2	63.8	476.47	509.47	468.11	469.03	215.03	486.82	478.39
Tennessee	37.1	81.5	35.8	33.1	8.0	32.9	73.5	482.17	497.52	449.35	479.03	226.11	496.17	482.03
Texas	35.5	67.6	31.1	28.3	6.2	29.7	67.1	455.51	444.35	452.32	461.58	211.72	488.76	444.98
Utah	30.0	48.0	29.9	28.2	5.9	31.7	51.3	474.25	444.09	455.78	479.78	308.57	493.92	450.09
Vermont	45.3	82.2	55.1	42.5	12.5	43.0	78.6	533.21	537.18	470.35	533.04	182.62	552.98	528.41
Virginia	34.8	55.0	37.6	31.6	8.4	32.7	58.1	472.95	474.01	455.53	472.85	214.85	490.97	473.07
Washington	27.8	35.3	32.2	26.7	6.7	28.1	38.5	482.14	451.62	457.99	488.08	209.75	505.05	461.78
West Virginia	32.0	82.2	35.4	29.8	10.0	28.2	68.6	471.16	500.95	466.81	467.62	199.12	481.61	481.30
Wisconsin	34.7	66.0	38.6	32.3	7.5	36.1	62.9	484.34	489.65	472.31	483.61	194.93	500.30	488.42
Wyoming	38.2	83.4	41.0	35.5	7.4	37.1	78.2	491.90	508.14	485.31	489.67	198.37	503.95	493.59
Outlying area														
Northern Mariana Islands	21.0	57.6	20.0	15.0	4.0	19.0	57.8	336.35	325.79	538.00	339.62	266.17	367.67	317.20

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

Table 7.E2—Percentage distribution of federally administered awards, by sex, age, and eligibility category, 2009

Sex and age	Total	Adults			Blind and disabled children ^a
		Aged	Blind	Disabled	
All persons					
Number	999,540	106,917	3,955	684,341	204,327
Percent	100.0	100.0	100.0	100.0	100.0
<i>Percentage distribution by sex</i>					
Male	53.2	40.0	56.2	51.8	64.8
Female	46.8	60.0	43.8	48.2	35.2
<i>Percentage distribution by age</i>					
Under 5	8.4	...	...	...	41.3
5-9	5.6	...	...	...	27.5
10-14	3.8	...	...	...	18.7
15-17	1.8	...	...	...	8.8
18-21	5.5	...	13.3	6.9	3.7
22-29	6.4	...	8.7	9.2	...
30-39	9.5	...	12.3	13.7	...
40-49	17.1	...	20.8	24.8	...
50-59	25.0	...	32.6	36.3	...
60-64	6.1	...	10.6	8.8	...
65-69	6.2	56.9	0.5	0.2	...
70-74	2.2	20.1	0.4	^b	...
75-79	1.3	11.7	0.4	^b	...
80 or older	1.2	11.2	0.4	^b	...
Male					
Number	532,016	42,797	2,221	354,574	132,424
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	9.7	...	...	...	39.1
5-9	7.6	...	...	...	30.4
10-14	4.8	...	...	...	19.3
15-17	2.0	...	...	...	7.9
18-21	6.1	...	13.2	7.8	3.3
22-29	6.4	...	8.5	9.6	...
30-39	8.7	...	13.1	13.0	...
40-49	16.1	...	22.8	24.0	...
50-59	24.7	...	31.7	36.8	...
60-64	5.8	...	10.0	8.6	...
65-69	4.8	58.2	0.2	0.2	...
70-74	1.7	21.5	0.3	^b	...
75-79	0.9	11.6	0.2	^b	...
80 or older	0.7	8.6	0.2	^b	...

(Continued)

7.E SSI: Recipient Characteristics

Table 7.E2—Percentage distribution of federally administered awards, by sex, age, and eligibility category, 2009—Continued

Sex and age	Total	Adults			Blind and disabled children ^a
		Aged	Blind	Disabled	
		<i>Female</i>			
Number	467,524	64,120	1,734	329,767	71,903
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	7.0	...	...	...	45.4
5–9	3.4	...	...	...	22.1
10–14	2.7	...	...	...	17.7
15–17	1.6	...	...	...	10.4
18–21	4.9	...	13.5	5.9	4.4
22–29	6.2	...	9.1	8.8	...
30–39	10.3	...	11.4	14.5	...
40–49	18.2	...	18.2	25.7	...
50–59	25.4	...	33.7	35.8	...
60–64	6.4	...	11.5	9.0	...
65–69	7.9	56.0	0.9	0.3	...
70–74	2.6	19.2	0.5	b	...
75–79	1.6	11.8	0.6	b	...
80 or older	1.8	13.0	0.7	b	...

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Includes students aged 18–21.

b. Less than 0.05 percent.

CONTACT: Clark Pickett (410) 965-9016 or supplement@ssa.gov.

Table 7.E3—Number and percentage distribution of recipients of federally administered payments, by sex, age, and eligibility category, December 2009

Sex and age	All recipients	Adults			Blind and disabled, under age 18
		Aged	Blind	Disabled	
All persons					
Number	7,676,686	1,185,959	63,371	5,227,568	1,199,788
Percent	100.0	100.0	100.0	100.0	100.0
<i>Percentage distribution by sex</i>					
Male	44.8	33.0	45.5	42.6	66.0
Female	55.2	67.0	54.5	57.4	34.0
<i>Percentage distribution by age</i>					
Under 5	2.5	...	...	...	16.1
5-9	4.6	...	...	...	29.1
10-14	5.2	...	...	...	33.6
15-17	3.3	...	...	...	21.3
18-21	4.5	...	5.6	6.6	...
22-29	7.6	...	13.2	10.9	...
30-39	8.6	...	13.1	12.4	...
40-49	13.1	...	16.2	19.0	...
50-59	17.1	...	19.9	24.9	...
60-64	7.1	...	8.6	10.3	...
65-69	6.9	15.1	6.7	6.7	...
70-74	6.4	21.5	5.5	4.4	...
75-79	5.3	22.7	4.5	2.6	...
80 or older	7.7	40.8	7.0	2.0	...
Male					
Number	3,436,951	391,594	28,840	2,224,911	791,606
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	3.2	...	...	...	14.0
5-9	6.9	...	...	...	29.9
10-14	8.0	...	...	...	34.8
15-17	4.9	...	...	...	21.3
18-21	6.1	...	6.8	9.3	...
22-29	9.1	...	15.1	13.9	...
30-39	8.9	...	14.9	13.6	...
40-49	12.4	...	18.1	18.9	...
50-59	15.8	...	20.0	24.1	...
60-64	5.9	...	7.9	9.0	...
65-69	5.5	17.3	5.7	5.3	...
70-74	4.9	24.3	4.4	3.2	...
75-79	3.9	23.9	3.2	1.7	...
80 or older	4.6	34.5	3.9	0.9	...
Female					
Number	4,239,735	794,365	34,531	3,002,657	408,182
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	1.9	...	...	...	20.0
5-9	2.7	...	...	...	27.7
10-14	3.0	...	...	...	31.1
15-17	2.0	...	...	...	21.2
18-21	3.3	...	4.6	4.5	...
22-29	6.3	...	11.5	8.7	...
30-39	8.2	...	11.5	11.5	...
40-49	13.7	...	14.7	19.2	...
50-59	18.2	...	19.8	25.5	...
60-64	8.1	...	9.1	11.4	...
65-69	8.1	13.9	7.5	7.7	...
70-74	7.6	20.2	6.4	5.3	...
75-79	6.5	22.0	5.5	3.3	...
80 or older	10.3	43.8	9.5	2.9	...

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

7.E SSI: Recipient Characteristics

Table 7.E4—Number and percentage distribution of persons with representative payees receiving federally administered payments, by eligibility category and age, December 2009

Category and age	Number			Percentage distribution		
	Total	With representative payee	Without representative payee	Total	With representative payee	Without representative payee
Total	7,676,686	2,894,184	4,782,502	100.0	37.7	62.3
Category						
Aged	1,185,959	44,612	1,141,347	100.0	3.8	96.2
Blind ^a	69,302	19,440	49,862	100.0	28.1	71.9
Disabled ^b	6,421,425	2,830,132	3,591,293	100.0	44.1	55.9
Age						
Under 18	1,199,788	1,198,721	1,067	100.0	99.9	0.1
18–64	4,451,288	1,530,379	2,920,909	100.0	34.4	65.6
65 or older	2,025,610	165,084	1,860,526	100.0	8.1	91.9

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

- a. Includes approximately 14,900 persons aged 65 or older.
b. Includes approximately 824,700 persons aged 65 or older.

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

Table 7.E5—Number and percentage distribution of persons receiving federally administered payments, by living arrangement, eligibility category, and age, December 2009

Living arrangement ^a	Number	Category			Age		
		Aged	Blind ^b	Disabled ^c	Under 18	18–64	65 or older
Total							
Number	7,676,686	1,185,959	69,302	6,421,425	1,199,788	4,451,288	2,025,610
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Own household	93.3	89.7	91.9	93.9	94.8	93.5	91.8
Another's household	4.9	8.7	5.9	4.2	3.9	4.8	5.8
Institutional care covered by Medicaid	1.7	1.5	2.2	1.8	1.3	1.6	2.3
Unknown	0.1	0.1	0	0.1	0	0.1	0

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

- a. As defined for determination of federal SSI payment standards.
b. Includes approximately 14,900 persons aged 65 or older.
c. Includes approximately 824,700 persons aged 65 or older.

CONTACT: Art Kahn (410) 965-0186 or supplement@ssa.gov.

Table 7.E6—Number of noncitizens receiving federally administered payments as a percentage of SSI recipients, by eligibility category, December 1982–2009, selected years

Year	All noncitizens		Aged		Blind and disabled	
	Number	Percentage of total SSI	Number	Percentage of total SSI	Number	Percentage of total SSI
1982	127,900	3.3	91,900	5.9	36,000	1.6
1985	210,800	5.1	146,500	9.7	64,300	2.4
1990	435,600	9.0	282,400	19.4	153,200	4.6
1991	519,660	10.2	329,690	22.5	189,970	5.2
1992	601,430	10.8	372,930	25.4	228,500	5.6
1993	683,150	11.4	416,420	28.2	266,730	5.9
1994	738,140	11.7	440,000	30.0	298,140	6.2
1995	785,410	12.1	459,220	31.8	326,190	6.3
1996	724,990	11.0	417,360	29.5	307,630	5.9
1997	650,830	10.0	367,200	27.0	283,630	5.5
1998	669,630	10.2	364,980	27.4	304,650	5.8
1999	684,930	10.4	368,330	28.2	316,600	6.0
2000	692,590	10.5	364,470	28.3	328,120	6.2
2001	695,650	10.4	364,550	28.9	331,100	6.1
2002	703,515	10.4	364,827	29.1	338,688	6.1
2003	696,772	10.1	356,298	28.9	340,474	6.0
2004	676,979	9.7	342,220	28.3	334,759	5.8
2005	680,397	9.6	344,166	28.3	336,231	5.7
2006	674,250	9.3	339,073	28.0	335,177	5.6
2007	663,210	9.0	330,665	27.5	332,545	5.4
2008	655,988	8.7	324,271	26.9	331,717	5.3
2009	644,966	8.4	316,216	26.7	328,750	5.1

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: Sherry Barber (410) 965-9851 or supplement@ssa.gov.



Health Care Programs

Medicare

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Medicaid

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Table 8.A1—Hospital Insurance, calendar years 1966–2009 (in millions of dollars)

Year	Receipts								Expenditures				Trust fund assets at end of year
	Total	Payroll taxes	Income from taxation of benefits	Transfers from Railroad Retirement account	Reimbursements from general revenues for—		Premiums from voluntary enrollees	Interest on investments and other income ^{a,b}	Total	Benefit payments ^{b,c}	Administrative expenses		
					Uninsured persons	Military wage credits					Amount ^d	Percentage of benefit payments	
1966	1,943	1,858	...	16	26	11	...	32	999	891	108	12.1	944
1967	3,559	3,152	...	44	301	11	...	51	3,430	3,353	77	2.3	1,073
1968	5,287	4,116	...	54	1,022	22	...	74	4,277	4,179	99	2.4	2,083
1969	5,279	4,473	...	64	617	11	...	113	4,857	4,739	118	2.5	2,505
1970	5,979	4,881	...	66	863	11	...	158	5,281	5,124	157	3.1	3,202
1971	5,732	4,921	...	66	503	48	...	193	5,900	5,751	150	2.6	3,034
1972	6,403	5,731	...	63	381	48	...	180	6,503	6,318	185	2.9	2,935
1973	10,821	9,944	...	99	451	48	2	278	7,289	7,057	232	3.3	6,467
1974	12,024	10,844	...	132	471	48	5	523	9,372	9,099	272	3.0	9,119
1975	12,980	11,502	...	138	621	48	7	664	11,581	11,315	266	2.4	10,517
1976	13,766	12,727	...	143	^e 803	141	9	746	13,679	13,340	339	2.5	10,605
1977	15,856	14,114	...	^f 214	^e 803	^g 143	12	784	16,019	15,737	283	1.8	10,442
1978	19,213	17,324	...	^f 214	688	141	13	834	18,178	17,682	496	2.8	11,477
1979	22,825	20,768	...	191	734	141	16	975	21,073	20,623	450	2.2	13,228
1980	26,097	23,848	...	244	697	141	18	1,149	25,577	25,064	512	2.0	13,749
1981	35,725	32,959	...	276	659	207	22	1,603	30,726	30,342	384	1.3	18,748
1982	37,998	34,586	...	351	808	207	24	2,022	36,144	35,631	513	1.4	^h 8,164
1983	44,570	37,259	...	358	878	ⁱ 3,456	27	2,593	39,877	39,337	540	1.4	12,858
1984	46,720	42,288	...	351	752	250	33	3,046	43,887	43,257	629	1.5	15,691
1985	51,397	47,576	...	371	766	^j -719	41	3,362	48,414	47,580	834	1.8	^h 20,499
1986	59,267	54,583	...	364	566	91	43	3,619	50,422	49,758	664	1.3	^h 39,957
1987	64,064	58,648	...	368	447	94	38	4,469	50,289	49,496	793	1.6	53,732
1988	69,239	62,449	...	364	475	80	41	5,830	53,331	52,517	815	1.6	69,640
1989	76,721	68,369	...	379	515	86	55	7,317	60,803	60,011	792	1.3	85,558
1990	80,372	72,013	...	367	413	^k -993	122	8,451	66,997	66,239	758	1.1	98,933
1991	88,839	77,851	...	352	605	89	432	9,510	72,570	71,549	1,021	1.4	115,202
1992	93,836	81,745	...	374	621	86	522	10,487	85,015	83,895	1,121	1.3	124,022
1993	98,187	84,133	...	400	367	81	675	^l 12,531	94,391	93,487	904	1.0	127,818
1994	109,570	95,280	1,639	413	506	80	907	10,745	104,545	103,282	1,263	1.2	132,844
1995	115,027	98,421	3,913	396	462	61	954	10,820	117,604	116,368	1,236	1.1	130,267
1996	124,603	110,585	4,069	401	419	^m -2,293	1,199	10,222	129,929	128,632	1,297	1.0	124,942
1997	130,154	114,670	3,558	419	481	70	1,319	9,637	139,452	137,762	1,690	1.2	115,643
1998	140,547	124,317	5,067	419	34	67	1,316	9,327	135,771	ⁿ 133,990	1,782	1.3	120,419
1999	151,597	132,306	6,552	430	652	71	1,447	10,139	130,632	ⁿ 128,766	1,866	1.4	141,385

(Continued)

8.A Medicare: Trust Funds

Table 8.A1—Hospital Insurance, calendar years 1966–2009 (in millions of dollars)—Continued

Year	Receipts								Expenditures				Trust fund assets at end of year
	Total	Payroll taxes	Income from taxation of benefits	Transfers from Railroad Retirement account	Reimbursements from general revenues for—		Premiums from voluntary enrollees	Interest on investments and other income ^{a,b}	Total	Benefit payments ^{b,c}	Administrative expenses		
					Uninsured persons	Military wage credits					Amount ^d	Percentage of benefit payments	
2000	167,185	144,351	8,787	465	470	2	1,382	11,729	131,095	ⁿ 128,458	2,636	2.1	177,475
2001	174,630	151,994	7,533	470	453	^o -1,175	1,370	13,986	143,379	ⁿ 141,183	2,195	1.6	208,726
2002	178,631	152,708	8,316	425	442	0	1,626	15,114	152,526	ⁿ 149,944	2,582	1.7	234,831
2003	175,812	149,242	8,318	426	393	0	1,604	15,828	154,616	ⁿ 152,084	2,533	1.7	256,026
2004	183,890	156,484	8,577	419	365	173	1,915	15,956	170,587	167,554	3,033	1.8	269,329
2005	199,374	171,384	8,765	445	286	0	2,416	16,078	182,933	^p 180,013	2,920	1.6	285,770
2006	211,515	181,274	10,319	471	408	0	2,645	16,398	191,933	^p 188,989	2,944	1.6	305,352
2007	223,717	191,855	10,593	483	468	0	2,841	17,477	203,058	^p 200,151	2,907	1.5	326,011
2008	230,815	198,693	11,733	526	506	0	2,938	^q 16,419	235,556	^r 232,299	3,257	1.5	321,270
2009	225,428	190,890	12,376	524	614	^s 968	2,908	17,148	242,478	239,260	3,218	1.3	304,220

SOURCE: 2010 Annual Report of the Boards of Trustees of the Federal Hospital Insurance and Federal Supplementary Medical Insurance Trust Funds, Table III.B4, and analogous tables from earlier annual reports. Because the table published in the 2010 Annual Report displays dollars rounded to the tenths of billions for selected years only, an analogous unpublished table displaying dollars rounded to the millions for all years was also used.

NOTES: Totals do not necessarily equal the sum of rounded components.

. . . = not applicable; HI = Hospital Insurance; SMI = Supplementary Medical Insurance.

- a. Other income includes recoveries of amounts reimbursed from the trust fund that are not obligations of the trust fund, receipts from the fraud and abuse control program (beginning in 1997), and other small amounts of miscellaneous income.
- b. Values after 2005 include additional premiums for Medicare Advantage (MA) plans that are deducted from beneficiaries' Social Security checks. These additional premiums are beneficiary obligations and occur when a beneficiary chooses an MA plan whose monthly plan payment exceeds the benchmark amount. Beneficiaries subject to such premiums may choose to either reimburse the plans directly or have the premiums deducted from their Social Security checks. The premiums deducted from the Social Security checks are transferred to the HI and SMI trust funds and then transferred from the trust funds to the plans.
- c. Includes costs of Peer Review Organizations from 1983 to 2001 (beginning with the implementation of the Prospective Payment System on October 1, 1983) and costs of Quality Improvement Organizations beginning in 2002.
- d. Includes costs of experiments and demonstration projects. Beginning in 1997, includes fraud and abuse control expenses, as provided for by Public Law (P.L.) 104-191.
- e. No transfer was made in 1976 because of the change in transfer dates from December to March. The 1977 transfer was for benefits and administrative expenses during the 15-month period beginning July 1976 and ending September 1977.
- f. No transfer was made in 1977 because of the change in transfer dates from August to June. The 1978 transfer was for contributions during the 15-month period beginning July 1976 and ending September 1977.
- g. Includes \$2 million in reimbursement from general revenues for costs arising from the granting of deemed wage credits to persons of Japanese ancestry who were interned during World War II.
- h. For 1982, assets exclude \$12,437 million loaned to the OASI trust fund under the interfund borrowing provisions of the law. Repayments of \$1,824 million and \$10,613 million were made in 1985 and 1986, respectively.
- i. The lump-sum general revenue transfer, as provided for by section 151 of P.L. 98-21.
- j. Includes the lump-sum general revenue adjustment of -\$805 million, as provided for by section 151 of P.L. 98-21.
- k. Includes the lump-sum general revenue adjustment of -\$1,100 million, as provided for by section 151 of P.L. 98-21.
- l. Includes \$1,805 million transfer from the SMI catastrophic coverage reserve fund, as provided for by P.L. 102-394.
- m. Includes the lump-sum general revenue adjustment of -\$2,366 million, as provided for by section 151 of P.L. 98-21.
- n. Includes monies transferred to the SMI trust fund for home health agency costs, as provided for by P.L. 105-33.
- o. Includes the lump-sum general revenue adjustment of -\$1,177 million, as provided for by section 151 of P.L. 98-21.
- p. Certain HI hospice costs were misallocated to, and paid from, the Part B account of the SMI trust fund. See also footnote r.
- q. Includes an adjustment of -\$853 million for interest inadvertently earned as a result of HI hospice costs that were misallocated to, and paid from, the Part B account of the SMI trust fund from May 2005 to September 2007.
- r. Benefit payments were \$223,815 million. Amount shown includes a transfer of \$8,484 million to the general fund of the Treasury for HI hospice costs that were misallocated to, and paid from, the Part B account of the SMI trust fund from May 2005 to September 2007. (The general fund, in turn, transferred \$8,484 million to the Part B account.)
- s. Includes the lump-sum general revenue adjustment of \$968 million, as provided for by section 151 of P.L. 98-21.

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Table 8.A2—Supplementary Medical Insurance, calendar years 1966–2009 (in millions of dollars)

Year	Receipts						Expenditures						Trust fund assets at end of year ^a
	Total	Premiums from participants ^b				Government contributions ^c	Transfers from states ^d	Interest and other income ^{e,f}	Total	Benefit payments ^{f,g,h}	Administrative expenses		
		Subtotal	Part B		Part D ^b						Amount	Percentage of benefit payments	
			Aged	Disabled									
1966	324	322	322	...	...	0	...	2	203	128	75	58.6	122
1967	1,597	640	640	...	...	933	...	24	1,307	1,197	110	9.2	412
1968	1,711	832	832	...	...	858	...	21	1,702	1,518	184	12.1	421
1969	1,839	914	914	...	...	907	...	18	2,061	1,865	196	10.5	199
1970	2,201	1,096	1,096	...	...	1,093	...	12	2,212	1,975	237	12.0	188
1971	2,639	1,302	1,302	...	...	1,313	...	24	2,377	2,117	260	12.3	450
1972	2,808	1,382	1,382	...	...	1,389	...	37	2,614	2,325	289	12.4	643
1973	3,312	1,550	1,491	59	...	1,705	...	57	2,844	2,526	318	12.6	1,111
1974	4,124	1,804	1,664	140	...	2,225	...	95	3,728	3,318	410	12.4	1,506
1975	4,673	1,918	1,759	158	...	2,648	...	107	4,735	4,273	462	10.8	1,444
1976	5,977	2,060	1,878	183	...	3,810	...	107	5,622	5,080	542	10.7	1,799
1977	7,805	2,247	2,030	217	...	5,386	...	172	6,505	6,038	467	7.7	3,099
1978	9,056	2,470	2,221	248	...	6,287	...	299	7,755	7,252	503	6.9	4,400
1979	9,768	2,719	2,451	267	...	6,645	...	404	9,265	8,708	557	6.4	4,902
1980	10,874	3,011	2,707	304	...	7,455	...	408	11,245	10,635	610	5.7	4,530
1981	15,374	ⁱ 3,722	ⁱ 3,356	ⁱ 366	...	ⁱ 11,291	...	361	14,028	13,113	915	7.0	5,877
1982	16,580	ⁱ 3,697	ⁱ 3,341	ⁱ 356	...	ⁱ 12,284	...	599	16,227	15,455	772	5.0	6,230
1983	19,824	4,236	3,845	391	...	14,861	...	727	18,984	18,106	878	4.8	7,070
1984	23,180	5,167	4,721	445	...	17,054	...	959	20,552	19,661	891	4.5	9,698
1985	25,106	5,613	5,105	508	...	18,250	...	1,243	23,880	22,947	933	4.1	10,924
1986	24,665	5,722	5,218	504	...	17,802	...	1,141	27,299	26,239	1,060	4.0	8,291
1987	31,844	^j 7,409	^j 6,747	^j 661	...	^j 23,560	...	876	31,740	30,820	921	3.0	8,394
1988	35,825	^j 8,761	^j 7,983	^j 778	...	^j 26,203	...	861	35,229	33,970	1,260	3.7	8,990
1989	^k 44,349	^{k,l} 12,263	9,793	993	...	30,852	...	^k 1,234	^k 39,783	38,294	^k 1,489	3.9	^k 13,556
1990	45,913	11,320	10,311	1,008	...	33,035	...	1,558	43,987	42,468	1,519	3.6	15,482
1991	51,224	11,934	10,846	1,088	...	37,602	...	1,688	48,877	47,336	1,541	3.3	17,828
1992	57,237	^m 14,077	^m 12,814	^m 1,263	...	^m 41,359	...	1,801	50,830	49,260	1,570	3.2	24,235
1993	57,679	^m 14,193	^m 12,731	^m 1,462	...	^m 41,465	...	2,021	57,783	ⁿ 55,784	2,000	3.6	24,131
1994	55,608	17,386	15,569	1,817	...	36,203	...	2,018	60,317	58,618	1,699	2.9	19,422
1995	60,306	19,717	17,651	2,066	...	39,007	...	1,582	66,599	64,972	1,627	2.5	13,130
1996	85,609	18,763	16,654	2,109	...	65,035	...	1,811	70,408	68,598	1,810	2.6	28,332
1997	81,924	19,289	17,079	2,210	...	60,171	...	2,464	74,124	72,757	1,368	1.9	36,131
1998	87,711	^o 20,933	^o 18,594	^o 2,338	...	^o 64,068	...	2,711	77,630	^p 76,125	1,505	2.0	46,212
1999	80,902	^o 18,967	^o 16,604	^o 2,362	...	^o 59,095	...	2,841	82,327	^p 80,724	1,603	2.0	44,787
2000	89,903	20,555	17,892	2,664	...	65,898	...	3,450	90,663	^p 88,893	1,770	2.0	44,027
2001	98,629	22,764	19,905	2,859	...	72,793	...	3,071	101,386	^p 99,663	1,723	1.7	41,270
2002	106,196	25,066	21,610	3,456	...	78,338	...	2,792	113,165	^p 110,969	2,196	2.0	34,301
2003	115,796	27,402	23,546	3,856	...	86,402	...	1,992	126,144	^p 123,825	2,318	1.9	23,953
2004	133,787	31,435	26,737	4,699	...	100,858	...	1,495	138,311	135,418	2,893	2.1	19,430

(Continued)

8.A Medicare: Trust Funds

Table 8.A2—Supplementary Medical Insurance, calendar years 1966–2009 (in millions of dollars)—Continued

Year	Receipts						Expenditures				Trust fund assets at end of year ^a		
	Total	Premiums from participants ^b			Government contributions ^c	Transfers from states ^d	Interest and other income ^{e,f}	Total	Administrative expenses				
		Subtotal	Part B						Part D ^b	Benefit payments ^{f,g,h}		Percentage of benefit payments	
			Aged	Disabled									
2005	158,089	37,535	31,722	5,813	...	119,189	...	1,365	153,511 ^q	150,326	3,185	2.1	24,008
2006	225,525	^r 46,337	36,346	6,507	^r 3,484	171,910	5,474	1,804	216,414	^{q,f} 213,045	3,369	1.6	33,119
2007	238,373	^s 50,808	39,676	7,096	^s 4,036	178,404	6,907	2,254	228,629	^{q,s} 225,228	3,401	1.5	42,863
2008	249,986	^t 55,222	42,335	7,897	^t 4,990	184,055	7,105	^u 3,604	232,556	^{t,v} 229,287	3,269	1.4	60,293
2009	282,808	^{w,x} 62,324	^w 47,433	^w 8,606	^{w,x} 6,284	209,818	7,572	3,096	266,498	263,038	3,460	1.3	76,603

SOURCES: 2010 Annual Report of the Boards of Trustees of the Federal Hospital Insurance and Federal Supplementary Medical Insurance Trust Funds, Table III.C1, analogous tables from earlier annual reports, and unpublished Treasury reports. Because the table published in the 2010 Annual Report displays dollars rounded to the tenths of billions for selected years only, an analogous unpublished table displaying dollars rounded to the millions for all years was also used.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable; SMI = Supplementary Medical Insurance; HI = Hospital Insurance.

- a. The financial status of SMI depends on both the assets and the liabilities of the trust fund.
- b. For Part D, premiums include both amounts withheld from Social Security benefit checks (and certain other Federal benefit payments) and amounts paid directly to Part D plans; the premiums paid directly to Part D plans are not displayed on Treasury statements and are estimated.
- c. For Part B, includes matching payments from the general fund, plus certain interest-adjustment items. For Part D, includes all federal government transfers, including amounts for the general subsidy, reinsurance, employer drug subsidy, low-income subsidy, administrative expenses, risk sharing, and state expenses for making low-income eligibility determinations. Includes amounts for the transitional assistance benefits in 2004–2007.
- d. With the availability of Part D drug coverage and low-income subsidies beginning in 2006, Medicaid is no longer the primary payer for full-benefit dual eligibles. States are subject to a contribution requirement and must pay the Part D account in the SMI trust fund a portion of their estimated forgone drug costs for this population. Starting in 2006, states must pay 90 percent of the estimated costs, with this percentage phasing down over a 10-year period, to 75 percent in 2015 and later.
- e. Other income includes recoveries of amounts reimbursed from the trust fund that are not obligations of the trust fund and other small amounts of miscellaneous income.
- f. Values after 2005 include additional premiums for Medicare Advantage (MA) plans that are deducted from beneficiaries' Social Security checks. These additional premiums are beneficiary obligations and occur when a beneficiary chooses an MA plan whose monthly plan payment exceeds the benchmark amount. Beneficiaries subject to such premiums may choose either to reimburse the plans directly or have the premiums deducted from their Social Security checks. The premiums deducted from the Social Security checks are transferred to the HI and SMI trust funds and then transferred from the trust funds to the plans.
- g. Includes costs of Peer Review Organizations from 1983 to 2001 and costs of Quality Improvement Organizations beginning in 2002.
- h. For Part D, includes payments to plans, subsidies to employer-sponsored retiree prescription drug plans, payments to states for making low-income eligibility determinations, Part D drug premiums collected from beneficiaries and transferred to Medicare Advantage plans and private drug plans, and premium amounts paid directly by enrollees to plans. (The last item is on an estimated basis; see footnote b.) Includes amounts for the transitional assistance benefits in 2004–2007.
- i. Section 708 of Title VII of the Social Security Act modifies the provisions for the delivery of Social Security benefit checks when the regularly designated delivery day falls on a Saturday, Sunday, or legal public holiday. Delivery of benefit checks normally due January 3, 1982 occurred on December 31, 1981. Consequently, the SMI premiums withheld from the checks (\$264 million) and the associated general revenue contributions (\$883 million) were added to the SMI trust fund on December 31, 1981. These amounts are excluded from the premium income and general revenue income for calendar year 1982.
- j. Delivery of benefit checks normally due January 3, 1988 occurred on December 31, 1987. Consequently, the SMI premiums withheld from the checks (\$692 million) and the associated general revenue contributions (\$2,178 million) were added to the SMI trust fund on December 31, 1987. These amounts are excluded from the premium income and general revenue income for calendar year 1988 (see footnote i).
- k. Includes the impact of the Medicare Catastrophic Coverage Act of 1988 as provided for by Public Law (P.L.) 100-360.
- l. Includes \$1,477 million in catastrophic coverage premiums not distributed between aged and disabled enrollees. These premiums were transferred from the HI Catastrophic Coverage Reserve Fund, which was created by the Medicare Catastrophic Coverage Act of 1988. The Medicare Catastrophic Coverage Repeal Act of 1989 mandated that this fund be discontinued and the balance transferred to the SMI trust fund.
- m. Delivery of benefit checks normally due January 3, 1993 occurred on December 31, 1992. Consequently, the SMI premiums withheld from the checks (\$1,089 million) and the associated general revenue contributions (\$3,175 million) were added to the SMI trust fund on December 31, 1992. These amounts are excluded from the premium income and general revenue income for calendar year 1993 (see footnote i).
- n. Includes the impact of the transfer to the Hospital Insurance (HI) trust fund of the SMI catastrophic coverage reserve fund on March 31, 1993, as specified in P.L. 102-394. Actual benefit payments for 1993 were \$53,979 million, and the amount transferred was \$1,805 million.
- o. Delivery of benefit checks normally due January 3, 1999 occurred on December 31, 1998. Consequently, the SMI premiums withheld from the checks (\$1,512 million) and the associated general revenue contributions (\$4,711 million) were added to the SMI trust fund on December 31, 1998. These amounts are excluded from the premium income and general revenue income for calendar year 1999 (see footnote i).
- p. Benefit payments less monies transferred from the HI trust fund for home health agency costs, as provided for by P.L. 105-33.
- q. Certain HI hospice costs were misallocated to, and paid from, the Part B account of the SMI trust fund. See also footnote v.
- r. Includes an estimated \$2,299 million for premiums paid directly to Part D plans. See also footnotes b and h.
- s. Includes an estimated \$2,369 million for premiums paid directly to Part D plans. See also footnotes b and h. Estimates for 2007 are revised.
- t. Includes an estimated \$3,117 million for premiums paid directly to Part D plans. See also footnotes b and h. Estimates for 2008 are revised.
- u. Includes an adjustment of \$812 million for interest inadvertently not earned as a result of HI hospice costs that were misallocated to, and paid from, the Part B account of the SMI trust fund from May 2005 to September 2007.
- v. Benefit payments were \$237,770 million. Amount shown includes -\$8,484 million, which represents a transfer from the general fund of the Treasury to the Part B account of the SMI trust fund for HI hospice costs that were misallocated to, and paid from, the Part B account from May 2005 to September 2007. (The HI trust fund, in turn, transferred \$8,484 million to the general fund.)
- w. Delivery of benefit checks normally due January 3, 2010 occurred on December 31, 2009. Consequently, the SMI premiums withheld from the checks (\$3,790 million, consisting of \$3,594 million for Part B and \$196 million for Part D) and the associated general revenue contributions (\$10,175 million, all attributable to Part B) were added to the SMI trust fund on December 31, 2009. These amounts are excluded from the premium income and general revenue income for calendar year 2010 (see footnote i).
- x. Includes an estimated \$3,805 million for premiums paid directly to Part D plans. See also footnotes b and h.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B0—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Total persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1990–2008

Type of coverage and service	1990	1995	2000	2005	2007	2008
<i>Persons enrolled (fee-for-service and managed care) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	34,203	37,535	39,632	42,500	44,263	45,412
Hospital Insurance	33,719	37,135	39,211	42,129	43,910	45,067
Supplementary Medical Insurance	32,629	35,685	37,369	39,730	41,109	42,020
<i>Persons enrolled (fee-for-service only) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	--	--	32,740	36,685	35,490	35,320
Hospital Insurance	--	--	32,329	36,318	35,141	34,982
Supplementary Medical Insurance	--	--	30,478	33,916	32,338	31,929
<i>Persons served (thousands) ^a</i>						
Hospital Insurance and/or Supplementary Medical Insurance	27,099	30,423	29,583	33,506	32,406	32,059
Hospital Insurance	7,036	8,036	7,325	8,307	7,952	7,843
Inpatient hospital	6,543	6,964	6,917	7,710	7,254	7,097
Skilled nursing services	638	1,233	1,468	1,847	1,828	1,841
Home health services ^b	1,936	3,427	1,444	1,752	1,705	1,705
Hospice services	--	--	541	871	995	1,048
Supplementary Medical Insurance	26,951	30,249	29,313	33,201	32,040	31,663
Physicians' and other medical services	26,350	26,539	28,763	32,709	31,481	31,114
Outpatient services	15,511	19,709	21,029	24,423	23,587	23,323
Home health services ^b	38	41	1,190	1,370	1,553	1,614
<i>Persons served per 1,000 enrollees</i>						
Hospital Insurance and/or Supplementary Medical Insurance	792	811	904	913	913	908
Hospital Insurance	209	216	227	229	226	224
Inpatient hospital	194	188	214	212	206	203
Skilled nursing services	19	33	45	51	52	53
Home health services ^b	57	92	45	48	49	49
Hospice services	--	--	17	24	28	30
Supplementary Medical Insurance	826	848	962	979	991	992
Physicians' and other medical services	808	744	944	964	974	974
Outpatient services	475	552	690	720	729	730
Home health services ^b	1	1	39	40	48	51
<i>Amount reimbursed (millions of dollars)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	101,419	158,980	174,261	274,143	288,504	301,136
Hospital Insurance	62,347	101,835	101,663	149,392	155,785	162,370
Inpatient hospital	56,716	78,944	85,197	116,647	116,922	120,251
Skilled nursing services	1,971	7,799	10,621	18,964	22,261	24,360
Home health services ^b	3,660	15,092	2,918	5,916	6,275	6,629
Hospice services	--	--	2,927	7,864	10,327	11,130
Supplementary Medical Insurance	39,072	57,145	72,599	124,752	132,719	138,766
Physicians' and other medical services	30,222	41,617	51,474	83,838	85,694	88,155
Outpatient services	8,773	15,328	16,787	33,931	37,560	40,140
Home health services ^b	78	200	4,338	6,982	9,465	10,472
<i>Amount reimbursed per person served (dollars)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	3,743	5,226	5,891	8,182	8,903	9,393
Hospital Insurance	8,862	12,672	13,878	17,984	19,592	20,704
Inpatient hospital	8,668	11,336	12,318	15,130	16,118	16,945
Skilled nursing services	3,092	6,325	7,235	10,267	12,176	13,231
Home health services ^b	1,890	4,403	2,021	3,377	3,680	3,889
Hospice services	--	--	5,409	9,027	10,378	10,620
Supplementary Medical Insurance	1,450	1,889	2,477	3,757	4,142	4,383
Physicians' and other medical services	1,147	1,409	1,709	2,563	2,722	2,833
Outpatient services	566	778	798	1,389	1,592	1,721
Home health services ^b	2,031	4,837	3,644	5,098	6,095	6,487

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B0—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Total persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1990–2008—Continued

Type of coverage and service	1990	1995	2000	2005	2007	2008
	<i>Amount reimbursed per enrollee (dollars)</i>					
Hospital Insurance and/or Supplementary Medical Insurance	2,965	4,236	5,323	7,473	8,129	8,526
Hospital Insurance	1,849	2,742	3,145	4,113	4,433	4,642
Inpatient hospital	1,682	2,126	2,635	3,212	3,327	3,438
Skilled nursing services	58	210	329	522	633	696
Home health services ^b	109	406	90	163	179	189
Hospice services	--	--	91	217	294	318
Supplementary Medical Insurance	1,197	1,601	2,382	3,678	4,104	4,346
Physicians' and other medical services	926	1,166	1,689	2,472	2,650	2,761
Outpatient services	269	430	551	1,000	1,162	1,257
Home health services ^b	2	6	142	206	293	328

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Measurement of the use of services represents those persons receiving a reimbursed service under the original (or fee-for-service) Medicare plan. Amount reimbursed represents payments recorded on fee-for-service claims only and excludes nonbilling reimbursements, such as end-of-year cost settlements and premiums paid to managed care plans. For all years, total enrollment as of July 1 in the original (or fee-for-service) Medicare program as well as those enrolled in alternative prepaid plans, such as Medicare managed care, are shown. Beginning in 2000, data for the original fee-for-service enrollment population are shown separately, as they provide a more accurate population for denominators for computing persons served per 1,000 enrollees and average fee-for-service reimbursement per enrollee.

Characterizations of persons enrolled and persons served may differ slightly from those in other tables in this section because of differences in sources and methodology.

-- = not available.

- a. Does not reflect beneficiaries who received covered services, but for whom no program payments were reported. Totals by type of service do not equal the sum of components because one beneficiary may have used several types of services.
- b. The Balanced Budget Act of 1997, enacted on August 5, 1997, specified that, effective January 1998, coverage for the majority of home health services not associated with a hospital or skilled nursing facility will be transferred from the Hospital Insurance (HI) program to the Supplementary Medical Insurance (SMI) program. The HI program will cover the first 100 home health agency visits following a hospital or skilled nursing facility stay of at least 3 days. From July 1981 to December 1997, home health agency services were almost exclusively provided by the HI program. For more information, refer to the 1998 HI and SMI trust fund reports.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B1—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Aged persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1990–2008

Type of coverage and service	1990	1995	2000	2005	2007	2008
<i>Persons enrolled (fee-for-service and managed care) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	30,948	33,142	34,261	35,777	36,966	37,896
Hospital Insurance	30,464	32,742	33,841	35,407	36,613	37,552
Supplementary Medical Insurance	29,685	31,742	32,602	33,780	34,656	35,364
<i>Persons enrolled (fee-for-service only) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	--	--	27,833	30,399	29,172	28,961
Hospital Insurance	--	--	27,422	30,033	28,824	28,624
Supplementary Medical Insurance	--	--	26,174	28,402	26,864	26,430
<i>Persons served (thousands) ^a</i>						
Hospital Insurance and/or Supplementary Medical Insurance	24,809	27,379	25,486	28,071	26,874	26,500
Hospital Insurance	6,367	7,147	6,361	7,016	6,664	6,559
Inpatient hospital	5,906	6,148	5,975	6,455	6,009	5,858
Skilled nursing services	615	1,186	1,390	1,692	1,692	1,703
Home health services ^b	1,818	3,185	1,325	1,574	1,518	1,514
Hospice services	--	--	514	825	941	995
Supplementary Medical Insurance	24,687	27,234	25,256	27,816	26,569	26,161
Physicians' and other medical services	24,193	26,621	24,846	27,468	26,177	25,779
Outpatient services	14,055	17,597	18,159	20,436	19,523	19,197
Home health services ^b	38	42	1,081	1,214	1,365	1,409
<i>Persons served per 1,000 enrollees</i>						
Hospital Insurance and/or Supplementary Medical Insurance	802	826	916	923	921	915
Hospital Insurance	209	218	232	234	231	229
Inpatient hospital	194	188	218	215	208	205
Skilled nursing services	21	36	51	57	59	59
Home health services ^b	60	97	48	52	53	53
Hospice services	--	--	19	27	33	35
Supplementary Medical Insurance	832	858	965	979	989	990
Physicians' and other medical services	815	839	949	967	974	975
Outpatient services	474	554	694	720	727	726
Home health services ^b	1	1	41	43	51	53
<i>Amount reimbursed (millions of dollars)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	88,778	138,948	148,488	227,594	237,806	247,118
Hospital Insurance	54,244	89,631	87,549	125,993	130,478	135,473
Inpatient hospital	48,952	68,213	72,041	95,557	94,442	96,462
Skilled nursing services	1,886	7,504	10,066	17,666	20,628	22,519
Home health services ^b	3,406	13,914	2,679	5,333	5,621	5,927
Hospice services	--	--	2,763	7,436	9,786	10,565
Supplementary Medical Insurance	34,533	49,317	60,939	101,601	107,329	111,646
Physicians' and other medical services	27,379	37,069	44,506	70,111	71,349	72,967
Outpatient services	7,077	12,045	12,588	25,385	27,779	29,659
Home health services ^b	78	203	3,845	6,106	8,201	9,020
<i>Amount reimbursed per person served (dollars)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	3,578	5,075	5,826	8,108	8,849	9,326
Hospital Insurance	8,520	12,542	13,763	17,958	19,580	20,656
Inpatient hospital	8,289	11,096	12,057	14,804	15,716	16,468
Skilled nursing services	3,068	6,325	7,242	10,277	12,190	13,223
Home health services ^b	1,874	4,368	2,022	3,388	3,702	3,914
Hospice services	--	--	5,375	9,015	10,398	10,623
Supplementary Medical Insurance	1,399	1,811	2,413	3,653	4,040	4,268
Physicians' and other medical services	1,132	1,392	1,791	2,552	2,726	2,831
Outpatient services	503	684	693	1,242	1,423	1,545
Home health services ^b	2,033	4,862	3,557	5,030	6,009	6,401

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B1—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Aged persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1990–2008—Continued

Type of coverage and service	1990	1995	2000	2005	2007	2008
	<i>Amount reimbursed per enrollee (dollars)</i>					
Hospital Insurance and/or Supplementary Medical Insurance	2,869	4,193	5,335	7,487	8,152	8,533
Hospital Insurance	1,781	2,738	3,193	4,195	4,527	4,733
Inpatient hospital	1,607	2,083	2,627	3,182	3,277	3,370
Skilled nursing services	62	229	367	588	716	787
Home health services ^b	112	425	98	178	195	207
Hospice services	--	--	101	248	340	369
Supplementary Medical Insurance	1,163	1,554	2,328	3,577	3,995	4,224
Physicians' and other medical services	922	1,168	1,700	2,469	2,656	2,761
Outpatient services	238	379	481	894	1,034	1,122
Home health services ^b	3	6	147	215	305	341

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Measurement of the use of services represents those persons receiving a reimbursed service under the original (or fee-for-service) Medicare plan. Amount reimbursed represents payments recorded on fee-for-service claims only and excludes nonbilling reimbursements, such as end-of-year cost settlements and premiums paid to managed care plans. For all years, total enrollment as of July 1 in the original (or fee-for-service) Medicare program as well as those enrolled in alternative prepaid plans, such as Medicare managed care, are shown. Beginning in 2000, data for the original fee-for-service enrollment population are shown separately, as they provide a more accurate population for denominators for computing persons served per 1,000 enrollees and average fee-for-service reimbursement per enrollee.

Characterizations of persons enrolled and persons served may differ slightly from those in other tables in this section because of differences in sources and methodology.

-- = not available.

- a. Does not reflect beneficiaries who received covered services, but for whom no program payments were reported. Totals by type of service do not equal the sum of components because one beneficiary may have used several types of services.
- b. The Balanced Budget Act of 1997, enacted on August 5, 1997, specified that, effective January 1998, coverage for the majority of home health services not associated with a hospital or skilled nursing facility will be transferred from the Hospital Insurance (HI) program to the Supplementary Medical Insurance (SMI) program. The HI program will cover the first 100 home health agency visits following a hospital or skilled nursing facility stay of at least 3 days. From July 1981 to December 1997, home health agency services were almost exclusively provided by the HI program. For more information, refer to the 1998 HI and SMI trust fund reports.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B2—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Disabled persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1990–2008

Type of coverage and service	1990	1995	2000	2005	2007	2008
<i>Persons enrolled (fee-for-service and managed care) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	3,255	4,393	5,371	6,723	7,297	7,516
Hospital Insurance	3,255	4,393	5,370	6,722	7,297	7,515
Supplementary Medical Insurance	2,943	3,942	4,768	5,951	6,453	6,655
<i>Persons enrolled (fee-for-service only) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	--	--	4,907	6,286	6,318	6,359
Hospital Insurance	--	--	4,907	6,285	6,317	6,358
Supplementary Medical Insurance	--	--	4,304	5,514	5,474	5,498
<i>Persons served (thousands) ^a</i>						
Hospital Insurance and/or Supplementary Medical Insurance	2,390	3,333	4,096	5,436	5,531	5,560
Hospital Insurance	680	933	964	1,291	1,288	1,284
Inpatient hospital	644	844	942	1,255	1,245	1,239
Skilled nursing services	23	54	78	128	136	138
Home health services ^b	122	272	119	178	187	191
Hospice services	--	--	27	46	54	54
Supplementary Medical Insurance	2,365	3,299	4,057	5,384	5,471	5,502
Physicians' and other medical services	2,249	3,184	3,917	5,241	5,305	5,335
Outpatient services	1,496	2,281	2,870	3,987	4,064	4,126
Home health services ^b	^c	^c	110	156	188	205
<i>Persons served per 1,000 enrollees</i>						
Hospital Insurance and/or Supplementary Medical Insurance	734	759	835	865	875	874
Hospital Insurance	209	212	196	205	204	202
Inpatient hospital	198	192	192	200	197	195
Skilled nursing services	7	12	16	20	22	22
Home health services ^b	38	62	24	28	30	30
Hospice services	--	--	6	7	9	8
Supplementary Medical Insurance	804	837	943	976	999	1,001
Physicians' and other medical services	764	808	910	950	969	970
Outpatient services	508	579	667	723	742	750
Home health services ^b	^c	^c	26	28	34	37
<i>Amount reimbursed (millions of dollars)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	11,239	21,024	25,773	46,550	50,697	54,018
Hospital Insurance	6,694	12,752	14,114	23,399	25,307	26,897
Inpatient hospital	6,346	11,079	13,156	21,091	22,479	23,788
Skilled nursing services	85	374	555	1,297	1,633	1,841
Home health services ^b	264	1,300	239	583	653	703
Hospice services	--	--	164	428	541	566
Supplementary Medical Insurance	4,545	8,272	11,660	23,151	25,390	27,121
Physicians' and other medical services	2,831	4,888	6,968	13,727	14,345	15,187
Outpatient services	1,714	3,384	4,198	8,547	9,782	10,481
Home health services ^b	^c	^c	493	877	1,264	1,452
<i>Amount reimbursed per person served (dollars)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	4,703	6,308	6,292	8,563	9,166	9,717
Hospital Insurance	9,847	13,666	14,641	18,124	19,651	20,950
Inpatient hospital	9,849	13,126	13,966	16,808	18,058	19,201
Skilled nursing services	3,702	6,959	7,115	10,127	11,999	13,328
Home health services ^b	2,156	4,777	2,008	3,280	3,495	3,686
Hospice services	--	--	6,074	9,223	10,036	10,561
Supplementary Medical Insurance	1,922	2,507	2,874	4,229	4,641	4,929
Physicians' and other medical services	1,259	1,535	1,779	2,619	2,704	2,847
Outpatient services	1,146	1,483	1,463	2,144	2,407	2,540
Home health services ^b	^c	^c	4,482	5,631	6,720	7,084

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B2—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Disabled persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1990–2008—Continued

Type of coverage and service	1990	1995	2000	2005	2007	2008
	<i>Amount reimbursed per enrollee (dollars)</i>					
Hospital Insurance and/or Supplementary Medical Insurance	3,453	4,786	5,252	7,405	8,024	8,495
Hospital Insurance	2,057	2,903	2,876	3,723	4,006	4,230
Inpatient hospital	1,950	2,522	2,681	3,356	3,558	3,741
Skilled nursing services	26	85	113	206	259	290
Home health services ^b	81	296	49	93	103	111
Hospice services	--	--	33	68	86	89
Supplementary Medical Insurance	1,544	2,098	2,709	4,199	4,638	4,933
Physicians' and other medical services	962	1,240	1,619	2,489	2,621	2,762
Outpatient services	582	858	975	1,550	1,787	1,906
Home health services ^b	^c	^c	115	159	231	264

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Measurement of the use of services represents those persons receiving a reimbursed service under the original (or fee-for-service) Medicare plan. Amount reimbursed represents payments recorded on fee-for-service claims only and excludes nonbilling reimbursements, such as end-of-year cost settlements and premiums paid to managed care plans. For all years, total enrollment as of July 1 in the original (or fee-for-service) Medicare program as well as those enrolled in alternative prepaid plans, such as Medicare managed care, are shown. Beginning in 2000, data for the original fee-for-service enrollment population are shown separately, as they provide a more accurate population for denominators for computing persons served per 1,000 enrollees and average fee-for-service reimbursement per enrollee.

Characterizations of persons enrolled and persons served may differ slightly from those in other tables in this section because of differences in sources and methodology.

-- = not available.

- a. Does not reflect beneficiaries who received covered services, but for whom no program payments were reported. Totals by type of service do not equal the sum of components because one beneficiary may have used several types of services.
- b. The Balanced Budget Act of 1997, enacted on August 5, 1997, specified that, effective January 1998, coverage for the majority of home health services not associated with a hospital or skilled nursing facility will be transferred from the Hospital Insurance (HI) program to the Supplementary Medical Insurance (SMI) program. The HI program will cover the first 100 home health agency visits following a hospital or skilled nursing facility stay of at least 3 days. From July 1981 to December 1997, home health agency services were almost exclusively provided by the HI program. For more information, refer to the 1998 HI and SMI trust fund reports.
- c. Sample population too small to yield valid calculated results.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3a—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of fee-for-service and managed care enrollees aged 65 or older, by census division and state or other area, July 1, 1990–2009, selected years (in thousands)

Census division and state or area	1990			2000			2008			2009		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Total												
All areas	30,939	30,255	684	34,247	27,840	6,407	37,896	28,961	8,935	38,765	28,925	9,840
United States ^a	30,341	29,657	684	33,540	27,137	6,403	37,053	28,405	8,648	37,899	28,365	9,534
New England	1,733	1,719	15	1,836	1,449	387	1,925	1,586	339	1,961	1,577	384
Connecticut	436	434	2	457	356	101	474	401	73	482	394	88
Maine	165	165	^b	180	178	2	200	187	13	205	179	26
Massachusetts	795	786	9	828	601	227	845	663	182	860	667	193
New Hampshire	126	126	^b	147	145	2	174	164	10	178	164	14
Rhode Island	145	141	3	148	94	54	146	88	58	147	88	59
Vermont	67	67	^b	76	76	^b	86	83	3	89	84	4
Middle Atlantic	5,082	4,945	137	5,263	4,078	1,186	5,421	3,879	1,542	5,489	3,819	1,670
New Jersey	1,006	977	29	1,067	905	162	1,112	991	122	1,129	986	144
New York	2,279	2,199	80	2,334	1,871	463	2,429	1,724	705	2,462	1,696	766
Pennsylvania	1,798	1,769	29	1,863	1,302	561	1,880	1,164	716	1,898	1,137	761
East North Central	5,223	5,153	70	5,541	4,948	593	5,907	4,709	1,198	6,001	4,645	1,356
Illinois	1,401	1,377	24	1,435	1,263	172	1,514	1,369	145	1,539	1,380	160
Indiana	685	673	12	735	703	32	800	691	109	814	681	133
Michigan	1,101	1,100	1	1,201	1,128	73	1,298	978	320	1,321	945	376
Ohio	1,387	1,364	22	1,478	1,206	272	1,550	1,122	427	1,568	1,108	460
Wisconsin	649	639	10	693	649	43	746	549	197	759	531	227
West North Central	2,423	2,350	74	2,518	2,252	266	2,669	2,130	539	2,712	2,114	598
Iowa	422	412	10	426	410	16	438	384	55	442	382	61
Kansas	337	333	5	347	319	28	356	322	35	362	320	42
Minnesota	544	500	44	582	496	86	645	401	244	659	387	272
Missouri	706	692	14	736	612	124	786	627	159	800	623	177
Nebraska	221	220	1	227	217	10	234	207	27	238	209	29
North Dakota	91	91	1	93	92	1	93	86	7	94	86	8
South Dakota	102	102	^b	106	106	1	115	103	12	117	108	9
South Atlantic	5,534	5,473	61	6,430	5,510	920	7,394	6,002	1,392	7,598	6,035	1,563
Delaware	80	80	^b	98	93	5	118	113	5	121	115	6
District of Columbia	71	68	2	65	59	6	63	56	7	64	57	7
Florida	2,174	2,158	15	2,507	1,815	692	2,778	2,012	766	2,844	2,004	840
Georgia	636	635	^b	752	702	50	922	799	123	956	805	151
Maryland	496	492	4	571	504	67	640	593	47	657	605	52
North Carolina	786	785	2	941	897	44	1,122	932	191	1,157	941	216
South Carolina	383	383	^b	464	463	2	574	499	75	595	506	88
Virginia	645	636	9	762	730	32	895	788	107	922	795	127
West Virginia	264	236	28	270	247	23	281	210	71	283	208	75
East South Central	1,886	1,868	18	2,061	1,930	131	2,313	1,915	398	2,362	1,902	461
Alabama	508	503	4	558	507	51	616	499	116	628	488	139
Kentucky	459	448	11	491	460	31	546	466	79	556	465	90
Mississippi	313	313	^b	330	325	5	359	329	31	366	330	36
Tennessee	607	604	3	682	638	44	792	621	171	813	618	195
West South Central	2,879	2,875	4	3,276	2,754	522	3,722	3,085	638	3,827	3,105	722
Arkansas	343	342	1	359	342	17	391	345	46	399	345	54
Louisiana	460	460	^b	497	404	93	518	402	116	529	396	133
Oklahoma	412	411	1	438	388	50	471	405	67	481	407	74
Texas	1,665	1,662	2	1,982	1,620	362	2,341	1,933	408	2,418	1,957	462
Mountain	1,489	1,452	38	1,914	1,400	514	2,362	1,642	720	2,447	1,660	786
Arizona	456	436	19	596	371	225	735	471	264	762	483	279
Colorado	324	312	11	403	253	151	495	327	169	515	333	182
Idaho	121	121	1	145	129	16	180	133	47	186	131	55
Montana	106	105	^b	119	118	^b	137	115	21	140	115	26
Nevada	128	127	1	212	139	73	281	191	90	293	198	95
New Mexico	160	158	2	200	159	41	241	181	60	249	182	67
Utah	147	145	2	183	176	7	227	161	65	235	156	78
Wyoming	47	47	^b	57	56	2	65	62	4	67	63	4

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3a—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of fee-for-service and managed care enrollees aged 65 or older, by census division and state or other area, July 1, 1990–2009, selected years (in thousands)—Continued

Census division and state or area	1990			2000			2008			2009		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Pacific	4,081	3,813	267	4,692	2,808	1,884	5,335	3,452	1,883	5,497	3,503	1,994
Alaska	22	22	b	35	35	b	49	48	b	51	50	1
California	2,989	2,750	239	3,430	1,947	1,483	3,855	2,434	1,420	3,964	2,479	1,485
Hawaii	118	114	4	151	98	53	173	104	69	178	103	75
Oregon	390	371	19	433	260	173	498	287	211	513	288	225
Washington	562	556	6	643	468	175	760	579	181	790	583	208
Unknown	10	10	b	9	8	1	4	4	b	4	3	b
Outlying areas												
Puerto Rico	337	337	b	401	400	1	478	195	283	492	188	303
U.S. Virgin Islands	6	6	b	9	9	b	13	13	b	14	13	b
Other	b	b	b	9	9	b	13	13	b	14	13	b
Foreign countries	255	254	b	288	285	3	339	336	3	348	345	3

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Characterization of persons enrolled may differ slightly from that in other tables on enrollment, and in prior editions of this table, because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

- a. Includes enrollees with unknown residence.
- b. Fewer than 500 enrollees.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3b—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of fee-for-service and managed care disabled enrollees, by census division and state or other area, July 1, 1990–2009, selected years (in thousands)

Census division and state or area	1990			2000			2008			2009		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Total												
All areas	3,260	3,238	22	5,373	4,913	460	7,516	6,359	1,157	7,755	6,435	1,321
United States ^a	3,154	3,132	22	5,219	4,759	459	7,336	6,271	1,065	7,573	6,350	1,223
New England	156	156	b	284	265	19	390	368	22	401	376	25
Connecticut	33	33	b	57	53	4	75	69	6	76	69	7
Maine	18	18	b	36	36	b	53	52	1	54	52	2
Massachusetts	72	72	b	131	120	11	174	166	7	179	171	8
New Hampshire	11	11	b	23	23	b	38	37	1	39	38	2
Rhode Island	14	14	b	24	20	4	32	26	6	33	27	6
Vermont	7	7	b	13	13	b	19	18	b	19	19	b
Middle Atlantic	474	470	4	729	655	73	974	783	190	1,004	792	212
New Jersey	86	85	1	133	124	9	170	158	12	175	159	16
New York	230	228	2	366	334	31	462	385	77	475	386	90
Pennsylvania	158	157	1	230	197	33	341	241	101	354	248	106
East North Central	562	560	2	823	773	50	1,126	1,013	113	1,167	1,034	134
Illinois	132	132	1	195	180	15	260	241	19	267	246	21
Indiana	77	76	1	117	114	3	165	150	14	171	153	19
Michigan	132	132	b	200	193	7	282	256	26	293	261	32
Ohio	156	155	1	221	199	23	291	254	37	302	259	43
Wisconsin	64	64	b	90	88	2	128	112	16	133	115	19
West North Central	212	210	2	339	324	14	480	436	45	495	443	52
Iowa	34	34	b	50	49	1	68	63	5	69	64	6
Kansas	26	26	b	43	42	2	62	58	4	64	59	5
Minnesota	44	44	b	72	70	1	104	92	12	108	94	14
Missouri	75	75	1	124	115	10	180	162	18	185	164	22
Nebraska	16	16	b	26	26	1	37	34	3	38	34	4
North Dakota	7	7	b	10	10	b	13	12	1	14	13	1
South Dakota	8	8	b	13	13	b	17	16	1	17	16	1
South Atlantic	608	604	4	1,082	998	84	1,511	1,281	230	1,555	1,291	263
Delaware	8	8	b	15	14	b	23	22	1	24	23	1
District of Columbia	7	7	b	10	9	b	12	11	1	12	12	1
Florida	165	165	1	316	253	63	434	332	102	445	333	112
Georgia	96	96	b	167	161	6	230	205	26	238	207	31
Maryland	46	46	b	75	70	5	104	98	6	108	101	7
North Carolina	106	106	b	195	191	4	282	247	36	291	250	41
South Carolina	59	59	b	105	105	b	149	128	21	154	129	25
Virginia	77	76	1	133	130	3	184	159	25	188	158	30
West Virginia	44	41	3	67	64	3	92	80	12	94	79	14
East South Central	287	286	1	498	482	16	708	607	101	728	607	121
Alabama	74	74	b	128	119	9	194	157	37	200	156	44
Kentucky	75	74	1	132	128	4	183	162	20	188	163	24
Mississippi	53	53	b	89	88	b	120	110	10	122	111	11
Tennessee	85	85	b	149	146	3	212	178	34	218	176	42
West South Central	317	317	b	541	492	50	823	711	112	857	722	134
Arkansas	48	48	b	80	78	2	117	101	16	122	103	19
Louisiana	71	71	b	104	92	12	138	120	18	142	121	21
Oklahoma	39	39	b	70	65	4	107	96	11	111	98	13
Texas	159	159	b	288	256	31	461	393	67	482	401	81
Mountain	148	147	1	286	240	46	426	327	99	440	332	108
Arizona	43	42	b	85	62	24	134	86	49	138	86	51
Colorado	34	34	1	65	53	11	84	67	17	87	68	19
Idaho	11	11	b	21	20	1	34	28	6	35	29	7
Montana	12	12	b	18	18	b	24	21	3	25	21	3
Nevada	13	13	b	31	24	7	49	39	10	50	40	10
New Mexico	19	19	b	34	31	3	53	46	7	55	47	9
Utah	13	13	b	24	23	b	38	31	7	39	31	9
Wyoming	4	4	b	8	8	b	11	10	b	11	10	1

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3b—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of fee-for-service and managed care disabled enrollees, by census division and state or other area, July 1, 1990–2009, selected years (in thousands)—Continued

Census division and state or area	1990			2000			2008			2009		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Pacific	389	381	7	636	529	107	898	744	154	926	753	172
Alaska	3	3	b	7	7	b	11	11	b	11	11	b
California	290	283	7	464	378	86	637	528	109	655	534	121
Hawaii	9	9	b	15	14	1	21	18	3	22	18	4
Oregon	34	33	1	58	46	11	86	62	24	89	63	26
Washington	53	53	b	93	84	9	143	126	17	148	127	21
Unknown	2	2	b	1	1	b	b	b	b	b	b	b
Outlying areas												
Puerto Rico	92	92	b	136	136	b	159	67	92	162	64	97
U.S. Virgin Islands	1	1	b	1	1	b	2	2	b	2	2	b
Other	b	b	b	2	2	b	3	3	b	3	3	b
Foreign countries	14	14	b	15	15	b	16	16	b	16	16	b

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Characterization of persons enrolled may differ slightly from that in other tables on enrollment, and in prior editions of this table, because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

- a. Includes enrollees with unknown residence.
- b. Fewer than 500 enrollees.

CONTACT: Maria Diacogiannis (410) 786-0178 or supplement@ssa.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B3c—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance):
Number of fee-for-service and managed care enrollees, by census division and state or other area,
July 1, 1990–2009, selected years (in thousands)**

Census division and state or area	1990			2000			2008			2009		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Total												
All areas	34,200	33,493	706	39,620	32,753	6,867	45,412	35,320	10,092	46,521	35,360	11,161
United States ^a	33,494	32,789	706	38,759	31,896	6,863	44,389	34,676	9,713	45,471	34,714	10,757
New England	1,889	1,874	15	2,120	1,714	405	2,315	1,954	361	2,362	1,953	409
Connecticut	469	467	2	514	409	105	549	470	79	558	463	95
Maine	183	183	^b	217	214	2	253	239	14	259	231	28
Massachusetts	867	858	9	958	721	237	1,019	830	189	1,039	838	201
New Hampshire	137	137	^b	170	167	3	212	201	11	217	202	16
Rhode Island	159	155	3	172	114	58	178	114	64	180	115	65
Vermont	75	74	^b	89	89	^b	105	102	3	108	103	5
Middle Atlantic	5,556	5,415	141	5,992	4,733	1,259	6,395	4,663	1,732	6,493	4,610	1,882
New Jersey	1,092	1,062	30	1,200	1,029	170	1,283	1,149	134	1,304	1,144	160
New York	2,508	2,427	82	2,699	2,206	494	2,891	2,109	782	2,937	2,082	855
Pennsylvania	1,956	1,926	30	2,093	1,498	595	2,221	1,405	816	2,252	1,385	867
East North Central	5,784	5,713	72	6,364	5,722	643	7,033	5,722	1,311	7,168	5,679	1,489
Illinois	1,534	1,509	24	1,630	1,443	187	1,775	1,610	164	1,806	1,626	181
Indiana	762	749	13	852	816	35	964	841	123	985	834	151
Michigan	1,233	1,231	1	1,401	1,320	80	1,580	1,234	346	1,615	1,206	408
Ohio	1,543	1,520	23	1,699	1,405	295	1,841	1,376	465	1,870	1,367	503
Wisconsin	714	703	10	783	737	46	874	661	213	892	646	246
West North Central	2,635	2,560	75	2,857	2,576	281	3,149	2,566	584	3,207	2,557	650
Iowa	457	446	11	476	459	17	506	446	60	512	445	67
Kansas	363	359	5	390	360	30	418	379	39	425	379	47
Minnesota	588	544	44	654	566	88	749	493	256	767	481	286
Missouri	781	767	14	861	727	133	966	789	177	985	786	199
Nebraska	237	237	1	253	243	11	271	241	31	276	243	33
North Dakota	98	98	1	103	102	1	107	98	8	108	99	9
South Dakota	110	110	^b	119	119	1	132	119	13	134	124	10
South Atlantic	6,142	6,077	65	7,512	6,508	1,004	8,905	7,283	1,622	9,153	7,326	1,826
Delaware	88	88	^b	112	107	5	141	135	6	145	138	7
District of Columbia	78	75	3	75	68	7	75	68	8	77	69	8
Florida	2,339	2,323	16	2,823	2,068	754	3,212	2,344	868	3,289	2,337	952
Georgia	732	731	^b	918	863	56	1,153	1,004	149	1,194	1,012	182
Maryland	541	538	4	646	574	72	745	691	54	764	705	59
North Carolina	892	890	2	1,136	1,088	48	1,405	1,178	226	1,448	1,191	257
South Carolina	442	441	^b	570	568	2	724	627	97	749	635	114
Virginia	722	712	10	895	860	35	1,079	947	132	1,110	953	157
West Virginia	308	277	30	337	312	26	373	290	83	377	287	90
East South Central	2,173	2,153	20	2,559	2,411	147	3,021	2,523	498	3,090	2,509	582
Alabama	582	577	5	686	626	60	809	656	153	828	645	183
Kentucky	534	521	12	623	588	35	728	629	100	743	629	115
Mississippi	366	366	^b	419	413	6	479	438	41	488	441	47
Tennessee	692	689	3	831	784	47	1,004	799	205	1,031	794	237
West South Central	3,196	3,192	5	3,817	3,246	571	4,545	3,795	750	4,683	3,827	856
Arkansas	391	390	1	439	420	19	509	446	62	520	448	73
Louisiana	531	531	^b	601	496	105	656	522	134	671	518	154
Oklahoma	451	450	1	508	453	54	578	501	78	592	505	87
Texas	1,824	1,821	2	2,269	1,876	393	2,802	2,326	476	2,900	2,357	543
Mountain	1,637	1,599	39	2,200	1,640	560	2,788	1,970	819	2,887	1,992	895
Arizona	498	478	20	681	433	248	870	557	313	899	569	331
Colorado	358	346	12	468	306	162	579	393	186	602	401	201
Idaho	132	131	1	166	149	17	214	161	53	222	160	62
Montana	117	117	^b	137	136	1	160	136	24	165	136	29
Nevada	141	140	1	243	163	80	330	230	100	343	238	105
New Mexico	179	177	2	234	190	44	294	227	67	304	229	75
Utah	160	157	2	206	199	7	264	192	72	274	187	87
Wyoming	52	51	^b	65	64	2	76	72	4	78	73	5

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3c—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of fee-for-service and managed care enrollees, by census division and state or other area, July 1, 1990–2009, selected years (in thousands)—Continued

Census division and state or area	1990			2000			2008			2009		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Pacific	4,469	4,195	275	5,328	3,337	1,991	6,233	4,197	2,036	6,423	4,256	2,167
Alaska	25	25	b	42	42	b	60	59	1	63	62	1
California	3,279	3,033	245	3,894	2,325	1,569	4,492	2,962	1,530	4,620	3,013	1,606
Hawaii	127	123	4	165	111	54	194	122	72	200	121	80
Oregon	424	404	19	491	307	184	584	349	235	602	351	251
Washington	615	609	6	736	553	183	903	704	199	938	710	228
Unknown	12	12	b	10	9	1	4	4	b	4	4	b
Outlying areas												
Puerto Rico	429	429	b	537	536	1	637	262	375	653	253	401
U.S. Virgin Islands	7	7	b	10	10	b	15	14	b	15	15	b
Other	b	b	b	11	11	b	16	16	b	17	16	b
Foreign countries	269	268	b	303	300	3	355	352	3	364	361	3

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Characterization of persons enrolled may differ slightly from that in other tables on enrollment because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

- a. Includes enrollees with unknown residence.
- b. Fewer than 500 enrollees.

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Table 8.B4—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of enrollees aged 65 or older, by program, age, sex, and race, July 1, 1990–2009, selected years (in thousands)

Age, sex, and race	1990			2000			2009		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Hospital Insurance and/or Supplementary Medical Insurance									
Total	30,939	30,255	684	34,247	27,840	6,407	38,765	28,925	9,840
Age									
65–69	9,690	9,514	176	9,166	7,360	1,806	11,669	8,803	2,866
70–74	7,951	7,752	200	8,609	6,878	1,731	8,937	6,533	2,405
75–79	6,058	5,904	155	7,284	5,902	1,381	7,121	5,167	1,954
80–84	3,957	3,864	93	4,868	4,010	859	5,593	4,169	1,424
85 or older	3,282	3,221	61	4,320	3,690	630	5,445	4,254	1,191
Sex									
Men	12,412	12,132	280	14,109	11,421	2,688	16,715	12,545	4,170
Women	18,528	18,123	404	20,138	16,419	3,719	22,050	16,380	5,670
Race									
White	26,847	26,251	596	29,752	24,251	5,502	32,963	24,805	8,158
Black	--	--	--	2,720	2,204	516	3,230	2,267	962
All other races ^a	3,113	3,050	63	1,682	1,305	377	2,508	1,797	712
American Indian or Alaska Native	--	--	--	42	39	3	138	120	18
Asian or Pacific Islander	--	--	--	494	386	108	806	610	196
Hispanic	--	--	--	710	555	155	855	572	284
Other	--	--	--	436	324	112	709	495	214
Unknown	979	953	26	92	81	12	64	56	8
Hospital Insurance									
Total	30,455	29,778	678	33,827	27,429	6,398	38,440	28,607	9,833
Age									
65–69	9,560	9,386	174	9,074	7,269	1,804	11,591	8,728	2,864
70–74	7,829	7,631	198	8,505	6,776	1,729	8,865	6,462	2,403
75–79	5,947	5,793	153	7,188	5,809	1,379	7,058	5,105	1,953
80–84	3,872	3,780	92	4,805	3,947	857	5,539	4,116	1,423
85 or older	3,248	3,188	60	4,256	3,627	629	5,386	4,196	1,190
Sex									
Men	12,276	11,998	278	13,976	11,291	2,685	16,609	12,442	4,167
Women	18,179	17,779	400	19,851	16,138	3,713	21,831	16,165	5,666
Race									
White	26,583	25,991	592	29,565	24,068	5,497	32,833	24,680	8,153
Black	--	--	--	2,668	2,153	515	3,190	2,229	961
All other races ^a	2,930	2,870	60	1,508	1,133	374	2,357	1,646	711
American Indian or Alaska Native	--	--	--	40	37	3	135	117	18
Asian or Pacific Islander	--	--	--	406	300	106	726	530	196
Hispanic	--	--	--	656	502	154	808	524	283
Other	--	--	--	405	294	111	689	476	213
Unknown	942	916	26	87	75	12	59	52	8

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B4—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of enrollees aged 65 or older, by program, age, sex, and race, July 1, 1990–2009, selected years (in thousands)—Continued

Age, sex, and race	1990			2000			2009		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Supplementary Medical Insurance									
Total	29,678	28,993	684	32,585	26,178	6,407	36,061	26,221	9,840
Age									
65–69	9,003	8,827	176	8,330	6,525	1,806	10,062	7,196	2,866
70–74	7,740	7,540	200	8,256	6,525	1,731	8,457	6,053	2,404
75–79	5,942	5,787	155	7,087	5,705	1,381	6,878	4,924	1,954
80–84	3,879	3,786	93	4,780	3,922	859	5,455	4,030	1,424
85 or older	3,114	3,054	61	4,131	3,501	630	5,208	4,017	1,191
Sex									
Men	11,754	11,474	280	13,203	10,515	2,688	15,220	11,050	4,169
Women	17,923	17,519	404	19,382	15,663	3,719	20,841	15,171	5,670
Race									
White	25,842	25,247	596	28,428	22,927	5,502	30,817	22,659	8,158
Black	--	--	--	2,543	2,027	516	2,973	2,011	962
All other races ^a	2,909	2,846	63	1,542	1,164	377	2,230	1,518	712
American Indian or Alaska Native	--	--	--	39	36	3	124	106	18
Asian or Pacific Islander	--	--	--	470	362	108	731	534	196
Hispanic	--	--	--	665	510	155	776	493	284
Other	--	--	--	368	257	112	599	385	214
Unknown	927	900	26	71	60	12	40	33	8

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Characterization of beneficiaries as to Medicare status and demographic categories may differ from that in other tables on enrollment, and in prior editions of this table, because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

-- = not available.

a. Prior to 2000, black enrollees and members of other races were combined into "All other races." In 1994, the Health Care Financing Administration expanded the race codes to include Hispanic, Asian or Pacific Islander, and American Indian or Alaska Native. There were a number of efforts during the 1990s to populate these codes and identify persons coded as "Unknown." Consequently for 2000 and later, black enrollees are broken out separately from "All other races" and the detail for that category is shown.

CONTACT: Maria Diacogiannis (410) 786-0178 or supplement@ssa.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B5—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of enrollees under age 65 who are disabled or have end-stage renal disease (ESRD), by program, age, sex, and race, July 1, 1990–2009, selected years (in thousands)

Age, sex, and race	1990			2000			2009		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Hospital Insurance and/or Supplementary Medical Insurance									
Total	3,260	3,238	22	5,373	4,913	460	7,755	6,435	1,321
Age									
Under 35	483	482	1	522	505	18	679	620	59
35–44	655	652	3	1,130	1,068	62	1,158	1,015	143
45–54	741	737	4	1,627	1,501	126	2,417	2,035	382
55–64	1,381	1,367	13	2,094	1,840	254	3,501	2,764	737
Sex									
Men	2,045	2,032	14	3,017	2,772	245	4,063	3,422	641
Women	1,215	1,207	8	2,356	2,141	215	3,692	3,012	680
Race									
White	2,485	2,467	18	3,994	3,641	353	5,626	4,675	951
Black	--	--	--	1,008	933	74	1,498	1,250	247
All other races ^a	713	710	3	356	327	32	614	494	120
American Indian or Alaska Native	--	--	--	23	22	1	64	59	5
Asian or Pacific Islander	--	--	--	41	38	4	93	79	14
Hispanic	--	--	--	201	182	19	313	241	72
Other	--	--	--	90	83	7	145	115	29
Unknown	62	62	1	15	14	1	17	15	2
Hospital Insurance									
Total	3,260	3,238	22	5,372	4,913	460	7,755	6,434	1,321
Age									
Under 35	483	482	1	522	504	18	679	620	59
35–44	655	652	3	1,129	1,068	62	1,157	1,015	143
45–54	741	737	4	1,627	1,501	126	2,417	2,035	382
55–64	1,381	1,367	13	2,093	1,840	254	3,501	2,764	737
Sex									
Men	2,045	2,032	14	3,017	2,772	245	4,063	3,422	641
Women	1,215	1,206	8	2,356	2,141	215	3,692	3,012	680
Race									
White	2,485	2,467	18	3,994	3,641	353	5,626	4,675	951
Black	--	--	--	1,008	933	74	1,498	1,250	247
All other races ^a	713	710	3	356	325	31	614	494	120
American Indian or Alaska Native	--	--	--	23	22	1	64	59	5
Asian or Pacific Islander	--	--	--	41	38	4	93	79	14
Hispanic	--	--	--	201	182	19	313	241	72
Other	--	--	--	90	83	7	145	115	29
Unknown	62	61	1	15	14	1	17	15	2

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B5—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of enrollees under age 65 who are disabled or have end-stage renal disease (ESRD), by program, age, sex, and race, July 1, 1990–2009, selected years (in thousands)—Continued

Age, sex, and race	1990			2000			2009		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Supplementary Medical Insurance									
Total	2,948	2,926	22	4,775	4,315	460	6,900	5,579	1,321
Age									
Under 35	442	440	1	467	449	18	615	556	59
35–44	587	584	3	998	937	62	1,025	882	143
45–54	666	662	4	1,422	1,296	126	2,144	1,762	382
55–64	1,253	1,240	13	1,887	1,633	254	3,116	2,379	737
Sex									
Men	1,836	1,822	14	2,667	2,423	245	3,571	2,930	641
Women	1,112	1,104	8	2,107	1,892	215	3,329	2,649	680
Race									
White	2,241	2,222	18	3,539	3,186	353	4,986	4,035	951
Black	--	--	--	918	843	74	1,360	1,113	247
All other races ^a	651	648	3	305	274	31	540	419	120
American Indian or Alaska Native	--	--	--	21	20	1	57	52	5
Asian or Pacific Islander	--	--	--	36	33	4	81	67	14
Hispanic	--	--	--	176	157	19	278	206	72
Other	--	--	--	71	64	7	123	94	29
Unknown	57	56	1	13	12	1	14	12	2

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Characterization of beneficiaries as to Medicare status and demographic categories may differ from that in other tables on enrollment, and in prior editions of this table, because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

-- = not available.

a. Prior to 2000, black enrollees and members of other races were combined into "All other races." In 1994, the Health Care Financing Administration expanded the race codes to include Hispanic, Asian or Pacific Islander, and American Indian or Alaska Native. There were a number of efforts during the 1990s to populate these codes and identify persons coded as "Unknown." Consequently for 2000 and later, black enrollees are broken out separately from "All other races" and the detail for that category is shown.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B5.1—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Home health agency covered visits and program payments, by census division and state or other area, selected years 1990–2008

Census division and state or area	1990			2000			2008		
	Total visits (thousands)	Program payments (thousands of dollars)	Program payments per visit (dollars)	Total visits (thousands)	Program payments (thousands of dollars)	Program payments per visit (dollars)	Total visits (thousands)	Program payments (thousands of dollars)	Program payments per visit (dollars)
Total									
All areas	70,268	3,713,652	53	90,566	7,215,958	80	121,005	16,872,735	139
United States	69,645	3,687,770	53	87,641	6,995,748	80	119,338	16,611,443	139
New England	4,716	243,462	52	6,953	511,226	74	6,113	905,099	148
Connecticut	1,062	56,806	53	1,696	120,602	71	1,646	218,797	133
Maine	380	19,900	52	664	47,095	71	447	70,191	157
Massachusetts	2,403	121,472	51	3,328	253,132	76	2,969	461,500	155
New Hampshire	292	15,274	52	504	36,257	72	474	71,625	151
Rhode Island	315	17,537	56	393	32,720	83	288	45,295	157
Vermont	264	12,473	47	368	21,418	58	290	37,691	130
Middle Atlantic	8,570	504,379	59	12,446	1,066,579	86	11,473	1,677,099	146
New Jersey	1,435	71,239	50	2,274	203,145	89	2,153	372,272	173
New York	2,867	193,812	68	5,983	510,094	85	6,019	787,012	131
Pennsylvania	4,269	239,329	56	4,190	353,341	84	3,301	517,815	157
East North Central	8,864	488,161	55	11,615	996,673	86	14,902	2,516,269	169
Illinois	2,695	152,406	57	3,112	278,001	89	4,914	912,423	186
Indiana	1,112	56,613	51	1,464	112,768	77	1,773	257,446	145
Michigan	2,157	128,251	59	3,436	311,343	91	4,066	738,860	182
Ohio	2,082	108,602	52	2,713	223,430	82	3,365	487,201	145
Wisconsin	817	42,289	52	891	71,131	80	784	120,338	153
West North Central	3,591	182,775	51	3,884	297,355	77	3,878	579,567	149
Iowa	490	20,609	42	602	39,847	66	562	70,354	125
Kansas	463	22,023	49	515	38,056	74	624	89,810	144
Minnesota	380	20,168	53	525	40,350	77	645	104,490	162
Missouri	1,809	96,011	53	1,651	134,144	81	1,572	243,656	155
Nebraska	283	15,169	54	318	25,063	79	307	48,148	157
North Dakota	104	4,979	48	140	9,814	70	87	10,814	124
South Dakota	71	3,816	54	134	10,083	75	80	12,296	154
South Atlantic	15,504	792,155	51	17,603	1,434,967	82	32,075	3,863,430	120
Delaware	195	9,033	46	222	18,759	85	242	38,687	160
District of Columbia	129	8,552	66	154	13,859	90	143	25,782	180
Florida	7,513	371,331	49	7,032	576,519	82	22,375	2,249,254	101
Georgia	2,647	120,132	45	2,568	197,327	77	2,420	381,209	158
Maryland	863	52,659	61	1,046	95,980	92	1,003	190,049	189
North Carolina	1,659	93,205	56	2,533	209,226	83	2,231	384,524	172
South Carolina	694	41,712	60	1,412	118,278	84	1,170	206,769	177
Virginia	1,277	70,498	55	2,030	157,804	78	2,055	318,649	155
West Virginia	528	25,033	47	606	47,215	78	435	68,507	157
East South Central	11,432	501,015	44	10,424	708,458	68	9,025	1,323,701	147
Alabama	2,792	111,655	40	2,466	163,019	66	2,169	313,186	144
Kentucky	1,202	56,717	47	1,916	135,941	71	1,659	247,880	149
Mississippi	2,777	108,559	39	2,514	159,346	63	1,969	289,930	147
Tennessee	4,661	224,084	48	3,529	250,152	71	3,228	472,705	146
West South Central	9,063	445,067	49	15,305	1,062,985	69	28,854	3,633,415	126
Arkansas	1,072	47,907	45	1,103	70,205	64	1,219	142,521	117
Louisiana	2,286	106,074	46	4,081	261,901	64	3,909	510,288	131
Oklahoma	1,153	57,990	50	2,354	149,916	64	3,513	402,956	115
Texas	4,553	233,095	51	7,767	580,964	75	20,213	2,577,650	128
Mountain	2,485	139,038	56	3,188	257,608	81	4,063	597,406	147
Arizona	568	33,529	59	497	43,124	87	610	107,677	177
Colorado	595	35,779	60	725	59,239	82	745	115,333	155
Idaho	153	8,904	58	258	22,771	88	324	46,172	143
Montana	195	9,825	50	208	16,200	78	138	21,816	158
Nevada	218	13,279	61	309	27,152	88	660	111,153	168
New Mexico	256	13,328	52	390	30,327	78	528	75,967	144
Utah	447	21,573	48	680	50,606	74	971	107,024	110
Wyoming	53	2,820	53	120	8,190	68	86	12,264	143

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B5.1—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Home health agency covered visits and program payments, by census division and state or other area, selected years 1990–2008—Continued

Census division and state or area	1990			2000			2008		
	Total visits (thousands)	Program payments (thousands of dollars)	Program payments per visit (dollars)	Total visits (thousands)	Program payments (thousands of dollars)	Program payments per visit (dollars)	Total visits (thousands)	Program payments (thousands of dollars)	Program payments per visit (dollars)
Pacific	5,419	391,717	72	6,222	659,896	106	8,955	1,515,458	169
Alaska	14	1,404	100	39	5,145	132	50	9,822	196
California	4,237	310,835	73	5,031	529,250	105	7,735	1,264,901	164
Hawaii	57	4,241	74	84	8,980	107	52	11,643	224
Oregon	417	29,872	72	399	45,225	113	373	75,502	202
Washington	693	45,365	65	669	71,296	107	744	153,589	206
Outlying areas ^a	622	25,882	42	2,926	220,210	75	1,666	261,292	157

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Medicare program payments represent fee-for-service only and exclude amounts paid for managed care services. With the implementation of the home health agency prospective payment system, beginning October 1, 2000, program payments are associated with episodes and not with individual visits.

Totals do not necessarily equal the sum of rounded components.

Statistics are subject to sampling error.

a. Includes unknown residence.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8.2—Medicare Part A (Hospital Insurance): Short-stay hospital discharges, days of care per discharge, and program payments, by census division and state or other area, selected years 1990–2008

Census division and state or area	1990				2000				2008			
	Total discharges ^a	Days per discharge	Program payments (thousands of dollars)	Program payments per discharge (dollars) ^b	Total discharges ^a	Days per discharge	Program payments (thousands of dollars)	Program payments per discharge (dollars) ^b	Total discharges ^a	Days per discharge	Program payments (thousands of dollars)	Program payments per discharge (dollars) ^b
Total												
All areas	10,521,925	8.8	53,708,287	5,281	11,719,960	6.0	81,230,259	6,971	11,820,795	5.6	110,231,605	9,390
United States	10,421,685	8.8	53,502,918	5,312	11,574,200	6.0	80,769,047	7,019	11,768,400	5.6	109,951,780	9,408
New England	561,265	10.0	3,097,017	5,702	563,305	5.8	4,365,878	7,797	628,540	5.6	6,245,111	10,005
Connecticut	117,230	10.4	719,274	6,366	125,295	6.2	1,097,034	8,807	157,745	5.8	1,733,915	11,099
Maine	54,695	9.3	239,915	4,477	69,740	5.6	434,302	6,239	63,270	5.4	563,028	8,929
Massachusetts	281,780	10.0	1,598,356	5,878	257,720	5.7	2,035,018	7,952	298,045	5.4	2,835,637	9,576
New Hampshire	39,640	9.2	190,737	4,917	46,970	5.6	334,202	7,167	51,125	5.7	503,884	9,896
Rhode Island	47,060	10.0	251,050	5,514	37,325	6.2	276,771	7,449	37,465	5.9	358,944	9,670
Vermont	20,860	9.7	97,686	4,793	26,255	5.7	188,547	7,237	20,890	5.4	249,700	12,014
Middle Atlantic	1,779,975	11.4	10,484,595	6,030	1,747,960	7.3	14,864,554	8,569	1,726,980	6.4	17,961,610	10,495
New Jersey	353,960	11.7	1,933,841	5,606	380,730	7.5	3,384,886	8,983	421,400	6.2	4,330,623	10,360
New York	729,465	13.1	4,888,241	6,884	750,130	8.2	7,155,309	9,625	762,235	7.1	8,983,327	11,903
Pennsylvania	696,550	9.5	3,662,512	5,358	617,100	6.1	4,324,358	7,036	543,345	5.7	4,647,659	8,627
East North Central	1,890,545	8.6	10,017,401	5,413	2,118,675	5.7	14,097,236	6,693	2,113,660	5.4	18,815,769	8,970
Illinois	509,075	8.9	2,670,430	5,410	580,250	5.7	3,840,706	6,672	628,045	5.4	5,545,788	8,934
Indiana	254,105	8.3	1,198,667	4,837	291,380	5.7	1,796,295	6,198	286,185	5.4	2,479,282	8,696
Michigan	376,545	8.9	2,199,988	5,925	468,095	6.1	3,473,727	7,459	473,230	5.6	4,553,755	9,669
Ohio	534,035	8.6	2,920,387	5,567	538,445	5.6	3,466,013	6,471	528,515	5.3	4,438,224	8,465
Wisconsin	216,785	7.7	1,027,929	4,817	240,505	5.4	1,520,493	6,352	197,685	5.1	1,798,718	9,155
West North Central	841,935	7.8	3,804,644	4,683	925,865	5.4	5,759,187	6,250	829,560	5.2	7,132,069	8,635
Iowa	145,360	8.1	635,397	4,440	164,590	5.4	959,210	5,844	126,850	5.2	1,057,449	8,373
Kansas	124,065	7.7	542,828	4,516	134,585	5.5	806,523	6,005	120,655	5.3	986,614	8,212
Minnesota	165,095	6.7	764,017	5,052	193,910	5.0	1,256,854	6,545	169,740	4.9	1,587,133	9,389
Missouri	266,625	8.6	1,270,319	4,872	281,505	5.7	1,810,063	6,460	286,795	5.4	2,402,264	8,421
Nebraska	69,875	7.6	300,070	4,434	76,015	5.2	506,171	6,686	68,700	5.2	606,681	8,860
North Dakota	33,230	7.2	141,966	4,368	33,640	5.1	193,994	5,793	26,190	5.2	231,174	8,844
South Dakota	37,685	7.2	150,047	4,058	41,620	5.2	226,370	5,454	30,630	5.0	260,751	8,527
South Atlantic	1,848,195	8.8	8,906,934	5,000	2,403,790	6.0	15,911,326	6,655	2,509,545	5.6	22,659,731	9,083
Delaware	27,260	9.3	149,857	5,599	36,845	6.4	275,714	7,513	45,390	6.2	484,918	10,716
District of Columbia	24,410	11.6	183,855	7,754	26,940	7.9	269,614	10,121	26,000	6.9	310,431	12,074
Florida	596,765	8.6	3,014,347	5,323	754,145	5.8	5,004,157	6,675	828,790	5.7	7,065,474	8,562
Georgia	269,315	7.9	1,143,257	4,373	320,335	5.8	2,061,225	6,469	324,865	5.6	2,854,324	8,827
Maryland	183,820	9.4	1,092,833	6,056	217,605	5.8	1,773,771	8,190	277,000	5.1	3,159,275	11,480
North Carolina	267,020	9.6	1,215,983	4,703	396,985	6.0	2,467,636	6,251	391,220	5.5	3,513,071	9,051
South Carolina	120,540	9.4	540,954	4,655	214,540	6.2	1,390,229	6,504	204,300	5.9	1,843,524	9,121
Virginia	245,065	8.9	1,102,096	4,627	300,785	6.1	1,896,484	6,338	305,500	5.6	2,553,309	8,403
West Virginia	114,000	8.2	463,751	4,217	135,610	5.8	772,492	5,724	106,480	5.8	875,402	8,273
East South Central	827,120	8.2	3,345,751	4,156	1,013,885	5.8	5,704,817	5,652	980,600	5.5	7,752,876	7,947
Alabama	228,580	8.1	959,825	4,308	274,470	5.5	1,492,353	5,454	268,195	5.4	1,959,094	7,354
Kentucky	201,625	8.3	831,981	4,255	244,210	5.6	1,362,272	5,614	235,830	5.5	2,000,708	8,524
Mississippi	145,900	7.8	501,880	3,522	191,685	6.4	1,013,536	5,310	173,935	5.9	1,374,487	7,933
Tennessee	251,015	8.3	1,052,065	4,307	303,520	5.9	1,836,655	6,078	302,640	5.4	2,418,587	8,031
West South Central	1,103,155	8.1	5,139,839	4,772	1,298,505	5.9	8,215,049	6,357	1,342,605	5.6	11,462,316	8,601
Arkansas	145,225	8.1	556,377	3,918	163,480	5.9	872,811	5,364	154,335	5.5	1,238,634	8,048
Louisiana	206,510	7.9	968,667	4,791	226,020	5.9	1,408,934	6,263	200,490	5.7	1,614,241	8,122
Oklahoma	162,505	8.0	700,390	4,403	187,220	5.8	1,069,986	5,730	190,505	5.3	1,509,975	7,957
Texas	588,915	8.2	2,914,405	5,079	721,785	5.9	4,863,318	6,774	797,275	5.6	7,099,465	8,983
Mountain	445,395	7.0	2,152,663	5,100	488,870	5.0	3,196,062	6,569	529,330	5.0	4,907,896	9,313
Arizona	135,340	7.0	711,071	5,601	131,325	5.0	866,364	6,642	163,470	5.0	1,580,945	9,712
Colorado	93,400	7.3	460,034	5,251	92,655	5.0	625,753	6,788	109,275	4.9	975,819	8,971
Idaho	34,290	6.2	146,967	4,382	47,780	4.6	290,241	6,102	33,925	4.8	315,124	9,314
Montana	39,820	6.6	164,698	4,230	44,270	4.8	258,894	5,850	33,790	4.7	282,156	8,371
Nevada	34,890	8.1	201,288	6,349	46,945	6.0	349,025	7,473	67,080	5.8	660,828	9,909
New Mexico	52,435	6.8	208,909	4,235	53,130	5.2	327,251	6,196	58,225	5.1	520,577	9,009
Utah	37,740	6.3	181,133	4,928	50,715	4.8	336,745	6,661	44,870	4.6	402,402	8,991
Wyoming	17,480	6.7	78,563	4,561	22,050	5.0	141,785	6,442	18,695	4.8	170,043	9,103

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8.2—Medicare Part A (Hospital Insurance): Short-stay hospital discharges, days of care per discharge, and program payments, by census division and state or other area, selected years 1990–2008—Continued

Census division and state or area	1990				2000				2008			
	Total discharges ^a	Days per discharge	Program payments (thousands of dollars)	Program payments per discharge ^b (dollars)	Total discharges ^a	Days per discharge	Program payments (thousands of dollars)	Program payments per discharge ^b (dollars)	Total discharges ^a	Days per discharge	Program payments (thousands of dollars)	Program payments per discharge ^b (dollars)
Pacific	1,124,100	7.2	6,554,074	6,290	1,013,345	5.8	8,654,933	8,599	1,107,580	5.6	13,014,397	11,850
Alaska	6,590	7.7	43,028	6,912	12,715	5.8	120,546	9,682	13,530	5.7	186,766	13,881
California	826,685	7.3	5,117,872	6,574	731,050	6.0	6,543,541	9,015	818,050	5.8	9,980,284	12,322
Hawaii	25,665	10.1	121,606	6,416	25,510	8.0	213,726	8,431	24,360	6.9	285,762	11,803
Oregon	104,300	6.2	474,125	5,211	92,985	4.6	624,464	6,741	77,295	4.9	760,570	9,876
Washington	160,860	6.7	797,442	5,414	151,085	4.9	1,152,655	7,672	174,345	4.9	1,801,013	10,372
Outlying areas ^c	100,240	7.8	205,369	2,091	145,760	6.8	461,482	3,187	52,395	7.2	279,825	5,452

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Medicare program payments represent fee-for-service only and exclude amounts paid for managed care services.

Totals do not necessarily equal the sum of rounded components.

Statistics are subject to sampling error.

- a. Excludes discharges for managed care enrollees that were paid by the managed care plan.
- b. Excludes discharges with covered services for which no program payments were reported.
- c. Includes unknown residence.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8.3—Medicare Part A (Hospital Insurance): Skilled nursing facility covered admissions and program payments, by census division and state or other area, selected years 1990–2008

Census division and state or area	1990			2000			2008		
	Covered admissions ^a	Program payments (thousands of dollars)	Program payments per admission (dollars) ^b	Covered admissions ^a	Program payments (thousands of dollars)	Program payments per admission (dollars) ^b	Covered admissions ^a	Program payments (thousands of dollars)	Program payments per admission (dollars) ^b
Total									
All areas	737,700	1,827,190	2,509	1,936,127	10,651,274	5,511	2,561,073	24,329,013	9,508
United States	736,466	1,824,011	2,509	1,932,134	10,635,515	5,514	2,559,144	24,316,008	9,510
New England	30,180	69,422	2,321	137,383	849,428	6,194	178,135	1,792,619	10,067
Connecticut	10,912	26,387	2,423	34,452	254,218	7,387	49,154	521,426	10,611
Maine	1,377	5,178	3,763	13,391	66,702	4,983	17,193	153,228	8,914
Massachusetts	11,733	26,107	2,267	64,946	389,016	6,003	80,473	817,151	10,160
New Hampshire	1,443	2,803	1,953	10,243	59,904	5,859	15,397	153,956	10,002
Rhode Island	3,685	7,472	2,037	9,452	54,095	5,757	9,656	85,360	8,844
Vermont	1,030	1,476	1,437	4,899	25,492	5,207	6,262	61,499	9,823
Middle Atlantic	97,503	254,554	2,642	290,974	1,937,835	6,677	392,309	3,757,908	9,584
New Jersey	10,725	27,797	2,599	68,638	412,488	6,014	114,836	1,142,205	9,947
New York	37,454	95,175	2,587	110,292	931,412	8,465	152,367	1,526,429	10,023
Pennsylvania	49,324	131,582	2,692	112,044	593,935	5,322	125,106	1,089,274	8,714
East North Central	142,252	323,800	2,305	374,369	2,014,281	5,382	494,798	4,679,269	9,469
Illinois	40,758	117,390	2,902	104,203	515,307	4,946	149,286	1,357,106	9,100
Indiana	22,093	61,858	2,844	59,020	330,466	5,600	73,004	734,821	10,078
Michigan	27,324	46,583	1,730	57,347	374,014	6,526	83,060	813,898	9,824
Ohio	33,115	61,462	1,894	107,475	555,817	5,173	136,537	1,238,838	9,078
Wisconsin	18,962	36,507	1,935	46,324	238,678	5,153	52,911	534,605	10,120
West North Central	95,732	209,517	2,206	190,486	756,598	3,973	229,029	1,812,944	7,929
Iowa	13,613	33,630	2,483	33,702	110,449	3,277	41,856	281,516	6,733
Kansas	12,712	24,259	1,919	27,334	99,927	3,657	33,809	277,662	8,222
Minnesota	28,729	54,696	1,926	42,888	199,933	4,662	46,286	386,971	8,367
Missouri	26,942	74,044	2,764	50,515	216,975	4,297	65,490	532,416	8,162
Nebraska	6,988	14,623	2,100	18,766	71,141	3,793	23,039	198,681	8,627
North Dakota	4,203	4,823	1,177	7,790	23,998	3,081	8,486	55,745	6,569
South Dakota	2,545	3,441	1,356	9,491	34,175	3,603	10,063	79,953	7,945
South Atlantic	97,746	221,593	2,304	351,271	1,962,427	5,597	491,773	4,677,432	9,516
Delaware	1,136	2,298	2,057	4,938	31,158	6,319	8,871	89,152	10,051
District of Columbia	1,118	3,635	3,283	3,745	23,113	6,175	4,961	48,480	9,814
Florida	46,617	114,361	2,504	139,057	813,328	5,866	183,236	1,881,910	10,273
Georgia	12,065	21,913	1,836	36,847	195,450	5,309	52,880	477,969	9,047
Maryland	8,450	19,625	2,344	38,562	194,644	5,065	57,074	510,819	8,952
North Carolina	12,138	21,391	1,776	50,008	270,927	5,422	70,946	648,285	9,148
South Carolina	4,787	9,645	2,127	24,069	130,669	5,430	31,988	309,480	9,677
Virginia	7,393	17,995	2,443	36,536	217,418	5,952	62,817	554,898	8,835
West Virginia	4,042	10,731	2,679	17,509	85,720	4,897	19,000	156,440	8,236
East South Central	41,228	74,764	1,842	131,017	665,240	5,081	176,656	1,551,848	8,789
Alabama	11,934	20,172	1,716	29,268	164,159	5,614	42,005	347,039	8,267
Kentucky	9,029	20,697	2,319	35,891	167,196	4,659	47,095	399,276	8,489
Mississippi	5,850	7,897	1,381	20,560	95,372	4,648	30,180	279,944	9,279
Tennessee	14,415	25,998	1,833	45,298	238,514	5,267	57,376	525,589	9,162
West South Central	62,302	173,258	2,809	183,161	869,345	4,757	256,821	2,261,095	8,809
Arkansas	6,254	13,455	2,167	22,862	83,236	3,644	30,202	211,870	7,019
Louisiana	12,244	42,336	3,488	27,165	120,360	4,433	37,966	310,206	8,177
Oklahoma	7,065	20,642	2,928	26,004	105,867	4,072	31,657	233,741	7,387
Texas	36,739	96,824	2,669	107,130	559,882	5,245	156,996	1,505,279	9,594
Mountain	43,063	105,189	2,467	87,157	435,051	5,004	103,264	989,629	9,599
Arizona	12,521	30,667	2,463	20,256	95,244	4,742	23,248	203,548	8,765
Colorado	10,220	29,480	2,928	18,993	99,687	5,256	26,689	267,566	10,052
Idaho	3,569	6,819	1,918	10,396	50,995	4,909	9,185	88,738	9,686
Montana	4,483	6,780	1,527	9,410	36,201	3,847	9,608	77,168	8,034
Nevada	2,173	7,202	3,328	6,348	37,209	5,867	9,655	114,768	11,893
New Mexico	2,494	7,687	3,250	6,130	31,929	5,213	8,578	85,275	9,969
Utah	6,081	14,452	2,378	11,672	65,662	5,627	11,491	111,077	9,671
Wyoming	1,522	2,102	1,388	3,952	18,123	4,586	4,810	41,489	8,644

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8.3—Medicare Part A (Hospital Insurance): Skilled nursing facility covered admissions and program payments, by census division and state or other area, selected years 1990–2008—Continued

Census division and state or area	1990			2000			2008		
	Covered admissions ^a	Program payments (thousands of dollars)	Program payments per admission (dollars) ^b	Covered admissions ^a	Program payments (thousands of dollars)	Program payments per admission (dollars) ^b	Covered admissions ^a	Program payments (thousands of dollars)	Program payments per admission (dollars) ^b
Pacific	126,460	391,915	3,155	186,316	1,145,310	6,174	236,359	2,793,264	11,832
Alaska	320	1,182	3,705	991	6,406	6,477	1,184	15,558	13,151
California	101,886	325,664	3,234	137,485	875,847	6,395	176,984	2,161,634	12,222
Hawaii	1,122	3,421	3,831	2,173	14,886	6,898	3,475	38,651	11,335
Oregon	8,869	26,399	3,111	13,964	67,421	4,844	15,282	151,343	9,913
Washington	14,263	35,249	2,551	31,703	180,749	5,742	39,434	426,079	10,823
Outlying areas ^c	1,234	3,179	2,593	3,993	15,760	3,948	1,929	13,005	6,745

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Medicare program payments represent fee-for-service only and exclude amounts paid for managed care services. Swing-bed hospital services are included in the total use and cost of Medicare skilled nursing facility services.

Totals do not necessarily equal the sum of rounded components.

- a. Includes skilled nursing facility admissions with at least one day of covered care under Medicare.
- b. The denominator used to calculate the average program payment per covered admission includes only those bills with Medicare reimbursement greater than zero.
- c. Includes unknown residence.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8.4—Medicare Part A (Hospital Insurance): Hospice care persons served, days of covered care, and program payments, by census division and state or other area, selected years 1993–2008

Census division and state or area	1993				2000				2008			
	Persons served	Covered days of care	Program payments (thousands of dollars)	Program payments per person served (dollars)	Persons served	Covered days of care	Program payments (thousands of dollars)	Program payments per person served (dollars)	Persons served	Covered days of care	Program payments (thousands of dollars)	Program payments per person served (dollars)
Total												
All areas	215,089	12,649,489	1,250,415	5,817	534,408	25,957,716	2,925,819	5,476	1,054,722	74,016,860	11,195,809	10,662
United States	207,660	11,808,826	1,184,752	5,709	529,745	25,646,822	2,903,200	5,482	1,044,829	72,821,043	11,082,232	10,654
New England	9,423	478,589	51,507	5,468	20,642	799,522	104,817	5,078	46,844	2,745,484	460,256	9,862
Connecticut	2,083	78,816	12,535	6,024	5,425	197,854	31,872	5,875	10,591	505,731	100,557	9,518
Maine	477	26,596	2,250	4,717	1,135	49,657	4,977	4,386	4,873	308,828	45,791	9,412
Massachusetts	4,951	272,647	27,718	5,601	9,906	381,853	47,884	4,834	20,766	1,308,325	211,976	10,250
New Hampshire	604	31,383	2,787	4,615	1,679	77,363	8,824	5,256	4,385	246,507	39,628	9,077
Rhode Island	887	49,247	4,514	5,090	1,758	61,325	7,978	4,538	4,822	295,699	50,162	10,475
Vermont	421	19,900	1,702	4,044	739	31,470	3,279	4,438	1,407	80,394	12,139	8,640
Middle Atlantic	24,505	1,233,263	126,915	5,186	63,096	2,697,689	333,959	5,293	121,578	7,444,325	1,182,916	9,766
New Jersey	5,933	309,909	29,758	5,017	13,067	560,846	67,535	5,169	27,481	1,649,138	278,862	10,183
New York	11,400	576,724	63,460	5,567	23,214	1,008,086	135,580	5,841	38,007	2,079,802	358,425	9,473
Pennsylvania	7,172	346,630	33,696	4,717	26,815	1,128,757	130,843	4,880	56,090	3,715,385	545,629	9,760
East North Central	37,377	2,061,004	207,056	5,541	93,025	4,154,816	464,650	4,996	171,472	10,725,988	1,624,904	9,520
Illinois	10,856	630,851	66,465	6,123	24,067	1,071,673	121,113	5,033	39,273	2,236,055	352,542	9,012
Indiana	1,708	101,725	9,310	5,454	9,984	484,813	51,390	5,149	22,255	1,479,591	211,988	9,573
Michigan	9,984	521,346	52,695	5,279	22,873	1,017,365	115,791	5,063	40,167	2,425,404	364,816	9,121
Ohio	10,981	596,101	59,575	5,427	27,228	1,159,156	132,377	4,863	49,833	3,226,162	490,227	9,889
Wisconsin	3,848	210,981	19,008	4,943	8,873	421,809	43,977	4,959	19,944	1,358,776	205,330	10,348
West North Central	14,164	865,934	80,074	5,659	36,720	1,748,289	176,312	4,804	77,037	5,017,325	700,941	9,128
Iowa	2,545	165,177	15,656	6,162	6,460	298,008	30,383	4,705	15,218	913,623	132,137	8,704
Kansas	2,190	144,153	13,161	6,021	5,550	267,095	26,068	4,708	11,855	816,806	112,185	9,504
Minnesota	3,303	185,954	18,338	5,555	8,175	402,271	45,222	5,532	15,208	905,619	136,387	9,010
Missouri	4,411	272,688	24,401	5,537	11,678	554,407	52,819	4,524	24,651	1,820,509	242,808	9,874
Nebraska	871	50,606	4,178	4,797	2,982	142,942	13,829	4,638	6,326	347,314	48,243	7,643
North Dakota	479	27,677	2,498	5,216	1,023	42,601	4,151	4,058	1,677	102,010	12,816	7,684
South Dakota	365	19,679	1,839	5,055	852	40,965	3,838	4,505	2,102	111,444	16,362	7,807
South Atlantic	48,947	2,962,460	289,612	5,921	112,303	5,663,896	656,729	5,851	227,830	16,696,244	2,619,243	11,546
Delaware	699	37,634	3,367	4,818	1,550	78,705	8,819	5,690	4,130	335,978	52,457	12,711
District of Columbia	283	13,467	1,381	4,899	614	29,755	3,866	6,297	1,231	83,937	13,934	11,375
Florida	28,465	1,677,775	170,767	6,001	56,248	2,819,511	350,229	6,229	96,262	7,048,713	1,204,362	12,566
Georgia	3,526	178,394	15,480	4,392	13,658	723,558	77,534	5,683	31,624	2,375,152	354,005	11,255
Maryland	2,792	136,154	13,277	4,771	7,638	298,523	34,343	4,496	14,233	761,402	120,876	8,517
North Carolina	7,111	541,896	49,572	6,972	13,198	717,297	77,961	5,913	32,147	2,358,641	345,206	10,776
South Carolina	2,181	146,669	13,105	6,009	6,552	345,769	34,999	5,345	19,452	1,708,932	244,260	12,625
Virginia	2,240	128,588	13,190	5,910	9,397	467,386	51,049	5,434	21,380	1,473,916	209,362	9,835
West Virginia	1,650	101,883	9,468	5,770	3,448	183,392	17,926	5,199	7,371	549,573	74,777	10,195
East South Central	11,117	769,046	71,474	6,432	32,995	2,126,137	208,855	6,332	74,368	6,405,320	851,127	11,510
Alabama	2,914	171,404	15,094	5,182	11,421	838,025	79,080	6,925	25,832	2,657,562	339,259	13,201
Kentucky	4,851	399,811	37,024	7,634	8,047	443,176	45,727	5,684	13,140	795,294	112,993	8,641
Mississippi	1,153	70,260	6,449	5,598	5,693	467,035	45,142	7,931	14,382	1,581,129	201,291	14,111
Tennessee	2,199	127,571	12,905	5,872	7,834	377,901	38,903	4,971	21,014	1,371,335	197,582	9,452
West South Central	21,336	1,299,331	122,741	5,754	62,010	3,558,642	364,302	5,876	121,982	9,731,645	1,352,036	11,135
Arkansas	1,975	124,494	10,723	5,430	5,281	323,207	30,097	5,700	10,324	661,395	93,058	9,056
Louisiana	1,991	97,592	8,831	4,436	7,154	350,795	36,690	5,130	16,937	1,326,621	174,646	10,364
Oklahoma	2,019	105,462	9,731	4,820	10,423	755,349	69,813	6,699	18,955	1,875,304	235,227	12,473
Texas	15,351	971,783	93,455	6,089	39,152	2,129,291	227,700	5,817	75,766	5,868,325	849,104	11,256
Mountain	12,453	624,739	66,336	5,330	38,491	1,806,545	212,559	5,523	77,847	6,107,308	940,034	12,132
Arizona	5,123	229,256	27,722	5,411	15,509	732,768	91,111	5,875	29,580	2,474,796	397,848	13,509
Colorado	3,250	160,173	16,126	4,970	8,840	344,737	41,239	4,666	15,010	990,172	159,231	10,660
Idaho	838	50,527	4,407	5,260	1,940	101,328	9,991	5,150	5,084	444,874	60,188	11,888
Montana	585	35,506	3,157	5,406	1,405	78,669	7,783	5,540	3,052	198,408	26,866	8,841
Nevada	958	58,400	6,536	6,823	3,637	144,309	20,034	6,301	7,578	464,621	81,634	10,820
New Mexico	1,348	74,578	6,969	5,174	3,838	236,349	24,181	5,589	7,689	643,948	91,225	11,930
Utah	263	11,506	979	3,740	2,805	143,233	15,676	4,914	8,878	835,996	115,107	13,039
Wyoming	88	4,793	437	4,971	517	25,152	2,540	4,943	976	54,493	7,932	8,152

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8.4—Medicare Part A (Hospital Insurance): Hospice care persons served, days of covered care, and program payments, by census division and state or other area, selected years 1993–2008—Continued

Census division and state or area	1993				2000				2008			
	Persons served	Covered days of care	Program payments (thousands of dollars)	Program payments per person served (dollars)	Persons served	Covered days of care	Program payments (thousands of dollars)	Program payments per person served (dollars)	Persons served	Covered days of care	Program payments (thousands of dollars)	Program payments per person served (dollars)
Pacific	28,338	1,514,460	169,033	5,969	70,463	3,091,286	381,013	5,409	125,871	7,947,404	1,350,770	10,783
Alaska	16	895	87	5,476	103	4,269	513	4,988	495	26,615	4,234	8,678
California	20,316	1,080,047	119,651	5,896	50,116	2,208,522	279,037	5,571	87,548	5,608,689	979,340	11,238
Hawaii	619	27,282	2,906	4,695	1,406	56,188	7,626	5,428	2,506	142,729	24,957	10,104
Oregon	3,365	185,088	17,102	5,083	8,915	387,697	42,557	4,773	16,062	995,296	153,491	9,601
Washington	4,022	221,148	29,285	7,281	9,923	434,610	51,278	5,168	19,260	1,174,075	188,746	9,844
Outlying areas ^a	7,429	840,663	65,662	8,839	4,663	310,894	22,619	4,851	9,893	1,195,817	113,577	11,571

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Medicare program payments represent fee-for-service only and exclude amounts paid for managed care services.

Characterizations of persons served may differ slightly from those in other tables in this section because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

a. Includes unknown residence.

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Table 8.B10—Medicare Part B (Supplementary Medical Insurance): Claims received by carriers and assignment rates, 1969–2009

Year	Total number of claims (thousands)	Net assignment rate ^a (percent)
1969	37,542	61.5
1970	42,148	60.8
1971	46,572	58.5
1972	51,041	54.9
1973	57,007	52.7
1974	68,307	51.9
1975	79,980	51.8
1976	91,624	50.5
1977	105,339	50.5
1978	117,886	50.6
1979	132,098	51.3
1980	150,048	51.5
1981	167,154	52.3
1982	182,440	53.0
1983	204,122	53.9
1984	238,362	59.0
1985	279,559	68.5
1986	306,714	68.0
1987	346,551	73.1
1988	386,763	77.3
1989	421,305	79.7
1990	474,226	81.1
1991	517,123	83.1
1992	554,619	86.2
1993	583,863	90.1
1994	622,514	92.8
1995	647,855	94.7
1996	678,030	95.9
1997	688,891	96.7
1998	697,523	97.3
1999	703,227	97.6
2000	720,493	97.9
2001	766,758	98.1
2002	821,993	98.4
2003	860,746	98.5
2004	922,197	98.7
2005	951,551	98.9
2006	944,072	99.0
2007	951,072	99.1
2008	979,324	99.2
2009	974,680	99.2

SOURCE: Centers for Medicare & Medicaid Services.

a. Represents the number of assigned claims as a percentage of claims received.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B11—Medicare Part B (Supplementary Medical Insurance): Reasonable charge determination for claims assigned and unassigned for aged and disabled persons, 1971–2009

Year	Claims approved		Charges before reduction	
	Number (thousands)	Percentage reduced	Amount (millions of dollars)	Percentage reduced
<i>Assigned claims</i>				
1971	25,919	44.5	1,571	11.1
1972	26,798	47.5	1,630	10.9
1973	28,376	55.6	1,751	11.9
1974	33,295	64.5	2,194	14.3
1975	39,218	70.8	2,716	17.8
1976	44,065	74.3	3,261	19.9
1977	50,260	72.8	3,936	19.4
1978	56,493	73.6	4,678	19.9
1979	64,051	77.0	5,746	21.2
1980	73,068	80.8	7,303	22.7
1981 ^a	80,127	82.8	8,868	24.0
1982	91,615	83.3	11,315	24.3
1983	103,139	81.0	13,657	23.6
1984	128,559	80.8	16,571	25.4
1985	176,956	81.7	22,008	27.4
1986	191,139	82.8	24,662	28.4
1987	234,488	83.4	31,179	28.0
1988	271,225	85.6	37,275	29.8
1989	304,649	86.9	44,567	31.0
1990	341,220	87.5	51,012	32.9
1991	384,168	87.4	60,057	36.2
1992	412,924	86.2	67,667	39.7
1993	460,761	88.8	76,186	42.8
1994	508,981	87.7	85,170	42.5
1995	539,630	86.4	93,300	42.3
1996	550,587	87.1	97,744	44.9
1997	566,591	87.4	103,389	45.9
1998	575,799	87.9	106,947	46.9
1999	590,463	88.9	114,981	47.8
2000	615,862	87.9	126,391	47.7
2001	665,196	87.5	145,641	48.0
2002	722,826	87.7	152,373	56.3
2003	759,783	88.9	189,920	52.0
2004	781,000	89.8	208,027	52.9
2005	846,093	87.2	236,430	52.0
2006	837,332	92.0	246,608	55.1
2007	822,902	93.4	253,248	58.1
2008	851,335	92.9	279,428	58.7
2009	867,878	93.0	291,065	59.3
<i>Unassigned claims</i>				
1971	17,955	57.6	1,348	12.5
1972	21,286	59.3	1,608	12.0
1973	24,691	66.4	1,886	12.6
1974	30,492	72.7	2,401	14.7
1975	36,182	77.4	2,973	17.7
1976	42,100	78.9	3,591	19.8
1977	48,619	77.1	4,233	19.0
1978	53,700	77.5	4,749	19.2
1979	59,961	80.9	5,596	20.7
1980	68,113	84.3	6,836	22.5
1981 ^a	72,765	85.8	7,870	23.8
1982	80,253	85.4	9,545	23.9
1983	87,436	82.7	10,885	22.9
1984	88,594	83.7	11,216	24.2
1985	77,965	84.6	10,059	25.9
1986	87,121	85.0	10,757	26.9
1987	83,116	82.4	10,258	24.7
1988	76,503	86.4	9,005	25.0
1989	74,947	90.1	8,971	25.0

(Continued)

Table 8.B11—Medicare Part B (Supplementary Medical Insurance): Reasonable charge determination for claims assigned and unassigned for aged and disabled persons, 1971–2009—Continued

Year	Claims approved		Charges before reduction	
	Number (thousands)	Percentage reduced	Amount (millions of dollars)	Percentage reduced
1990	77,746	90.4	8,789	25.3
1991	77,520	91.3	7,884	23.1
1992	66,403	82.9	6,215	18.5
1993	51,080	86.5	4,267	16.5
1994	39,364	86.4	3,255	16.3
1995	29,975	83.4	2,543	15.4
1996	22,819	84.4	1,952	15.8
1997	18,615	84.4	1,650	16.4
1998	15,172	82.3	1,382	17.1
1999	13,834	81.3	1,316	17.7
2000	12,755	78.6	1,287	18.1
2001	12,085	76.7	1,252	18.2
2002	11,352	79.8	1,107	17.2
2003	11,100	82.1	1,066	15.9
2004	10,016	83.0	1,009	16.3
2005	9,589	82.2	1,000	17.4
2006	8,439	85.1	894	18.8
2007	7,378	88.4	790	18.2
2008	6,926	88.1	774	18.7
2009	6,677	88.0	746	19.1

SOURCE: Centers for Medicare & Medicaid Services.

a. Excludes Texas Blue Shield plan from July to December 1981.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B11.1—Medicare Part B (Supplementary Medical Insurance): Physician/supplier covered services, allowed charges, and program payments, by census division and state or other area, selected years 1993–2008

Census division and state or area	1993			2000			2008		
	Services (thousands)	Allowed charges (thousands of dollars)	Program payments (thousands of dollars)	Services (thousands)	Allowed charges (thousands of dollars)	Program payments (thousands of dollars)	Services (thousands)	Allowed charges (thousands of dollars)	Program payments (thousands of dollars)
Total									
All areas	1,062,047	46,155,237	35,206,101	1,247,483	66,911,902	51,456,747	1,798,520	113,804,294	88,112,583
United States	1,050,605	45,677,059	34,838,562	1,229,583	66,047,753	50,790,939	1,788,829	113,265,972	87,692,856
New England	57,475	2,532,989	1,923,891	60,701	3,357,803	2,562,793	88,428	5,584,305	4,288,238
Connecticut	14,971	688,632	523,801	16,024	908,981	696,770	25,019	1,647,584	1,274,194
Maine	5,093	203,657	152,933	6,725	357,616	272,731	8,517	526,683	401,522
Massachusetts	26,993	1,216,000	927,157	26,099	1,464,973	1,117,345	39,038	2,408,763	1,847,246
New Hampshire	3,712	151,558	113,589	5,018	264,412	200,026	7,119	475,844	363,699
Rhode Island	5,089	200,132	152,442	4,512	227,420	175,093	5,528	325,323	250,872
Vermont	1,617	73,011	53,968	2,323	134,403	100,828	3,206	200,107	150,707
Middle Atlantic	190,966	8,727,545	6,679,025	198,796	11,114,019	8,582,935	273,429	17,391,705	13,521,603
New Jersey	39,741	1,795,252	1,374,199	46,582	2,706,642	2,098,689	75,275	4,904,212	3,831,590
New York	84,011	3,869,484	2,968,599	94,073	5,222,652	4,031,686	128,201	8,010,115	6,231,676
Pennsylvania	67,214	3,062,810	2,336,227	58,141	3,184,725	2,452,560	69,953	4,477,378	3,458,336
East North Central	178,252	7,526,281	5,711,398	202,748	10,835,911	8,301,058	281,283	17,828,103	13,743,026
Illinois	43,382	1,995,230	1,518,069	50,279	2,722,188	2,087,286	79,362	5,115,595	3,943,757
Indiana	19,724	855,441	642,446	27,376	1,418,457	1,079,378	38,995	2,450,856	1,885,836
Michigan	48,483	1,916,709	1,468,007	50,326	2,823,614	2,173,760	65,723	4,315,761	3,336,254
Ohio	47,701	2,011,679	1,522,281	50,755	2,722,161	2,085,982	69,582	4,328,609	3,341,038
Wisconsin	18,962	747,222	560,596	24,012	1,149,491	874,652	27,621	1,617,282	1,236,140
West North Central	69,790	2,693,967	2,024,254	86,209	4,213,384	3,209,083	111,818	6,704,905	5,151,244
Iowa	13,006	457,750	342,045	15,717	732,727	556,426	18,341	1,068,590	816,190
Kansas	10,888	451,677	342,214	13,030	671,147	514,252	18,212	1,104,865	851,817
Minnesota	11,608	438,052	323,989	16,548	798,015	603,082	19,195	1,165,810	892,480
Missouri	22,543	914,332	693,436	25,365	1,300,857	996,024	36,574	2,224,452	1,714,680
Nebraska	6,294	233,733	174,219	8,226	388,700	294,564	10,889	642,931	493,731
North Dakota	2,595	96,467	72,033	3,349	149,240	113,542	3,834	226,984	174,254
South Dakota	2,856	101,957	76,316	3,974	172,698	131,194	4,774	271,272	208,092
South Atlantic	216,862	9,345,787	7,164,358	270,430	14,646,480	11,291,572	411,760	26,119,179	20,270,939
Delaware	3,037	137,176	104,482	4,302	244,628	188,488	7,559	487,695	377,909
District of Columbia	2,620	121,120	93,475	2,346	136,917	105,493	2,810	203,319	158,192
Florida	96,578	4,399,081	3,410,771	105,141	6,100,419	4,747,090	160,517	10,660,842	8,337,649
Georgia	25,860	1,058,968	807,700	32,915	1,725,056	1,323,041	51,911	3,226,569	2,491,831
Maryland	18,896	883,554	679,402	22,693	1,316,285	1,014,698	35,170	2,396,542	1,857,549
North Carolina	26,228	1,014,093	763,647	40,027	1,960,603	1,494,488	61,791	3,615,222	2,786,246
South Carolina	13,834	515,359	386,450	21,862	1,117,181	855,190	33,353	2,016,571	1,557,922
Virginia	22,218	890,532	672,647	30,380	1,517,689	1,159,960	45,547	2,734,740	2,105,090
West Virginia	7,592	325,904	245,784	10,764	527,703	403,124	13,102	777,680	598,551
East South Central	70,461	2,797,568	2,129,747	91,596	4,658,756	3,566,213	134,315	7,895,778	6,097,524
Alabama	19,916	810,199	618,658	24,361	1,286,579	988,420	34,658	2,107,429	1,629,037
Kentucky	16,959	662,058	503,342	22,036	1,062,201	812,037	32,865	1,893,975	1,463,300
Mississippi	11,214	449,002	340,330	14,913	776,595	595,267	21,852	1,303,769	1,006,619
Tennessee	22,372	876,309	667,417	30,286	1,533,381	1,170,489	44,940	2,590,605	1,998,568
West South Central	104,249	4,415,507	3,375,452	134,444	6,928,068	5,349,132	206,384	12,687,707	9,842,891
Arkansas	12,311	487,744	367,896	15,708	781,724	599,631	22,005	1,282,945	990,511
Louisiana	17,967	798,002	610,958	19,622	1,058,214	816,817	26,084	1,649,042	1,275,957
Oklahoma	13,387	538,757	408,622	15,874	845,762	649,096	23,737	1,472,732	1,135,019
Texas	60,584	2,591,004	1,987,977	83,240	4,242,368	3,283,588	134,559	8,282,988	6,441,404
Mountain	43,230	1,899,807	1,443,957	53,859	2,986,527	2,286,851	85,518	5,759,390	4,445,806
Arizona	14,630	641,234	493,319	16,122	897,890	694,194	28,362	1,869,126	1,454,695
Colorado	9,017	368,183	280,001	10,021	545,066	417,340	17,050	1,150,648	889,327
Idaho	3,187	133,188	100,116	4,382	232,051	176,337	5,791	359,942	274,736
Montana	2,737	122,992	91,713	3,944	219,874	167,290	4,711	310,915	237,390
Nevada	4,744	239,310	183,265	6,605	374,374	287,238	11,278	817,956	631,208
New Mexico	4,111	178,573	134,253	5,218	293,417	224,310	8,172	567,034	436,457
Utah	3,580	158,473	117,886	5,657	320,886	241,885	7,525	504,548	384,742
Wyoming	1,224	57,853	43,405	1,910	102,968	78,257	2,628	179,221	137,251

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B11.1—Medicare Part B (Supplementary Medical Insurance): Physician/supplier covered services, allowed charges, and program payments, by census division and state or other area, selected years 1993–2008—Continued

Census division and state or area	1993			2000			2008		
	Services (thousands)	Allowed charges (thousands of dollars)	Program payments (thousands of dollars)	Services (thousands)	Allowed charges (thousands of dollars)	Program payments (thousands of dollars)	Services (thousands)	Allowed charges (thousands of dollars)	Program payments (thousands of dollars)
Pacific	119,320	5,737,609	4,386,479	130,801	7,306,805	5,641,301	195,894	13,294,900	10,331,585
Alaska	599	30,305	22,675	964	60,128	45,822	1,815	137,035	105,380
California	91,760	4,561,912	3,504,741	99,393	5,621,663	4,358,871	149,080	10,258,028	8,000,363
Hawaii	2,517	112,138	83,062	3,642	180,404	134,791	4,796	268,570	203,479
Oregon	8,461	362,350	271,415	9,002	487,346	371,215	11,884	794,582	609,008
Washington	15,982	670,904	504,586	17,800	957,265	730,602	28,319	1,836,685	1,413,356
Outlying areas ^a	11,442	478,177	367,538	17,900	864,149	665,808	9,690	538,322	419,727

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Allowed charges and program payments represent fee-for-service utilization only and exclude amounts paid for managed care services.

Totals do not necessarily equal the sum of rounded components.

Statistics are subject to sampling error.

a. Includes unknown residence.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B11.2—Medicare Part B (Supplementary Medical Insurance): Outpatient facilities persons served and program payments, by census division and state or other area, selected years 1991–2008

Census division and state or area	1991		2000		2008	
	Persons served (thousands)	Program payments (millions of dollars)	Persons served (thousands)	Program payments (millions of dollars)	Persons served (thousands)	Program payments (millions of dollars)
Total						
All areas	17,176	9,433	21,537	16,732	24,000	39,705
United States	17,040	9,386	21,355	16,620	23,927	39,557
New England	1,060	587	1,237	937	1,493	2,522
Connecticut	233	142	274	225	326	540
Maine	124	45	168	117	199	333
Massachusetts	493	297	525	410	641	1,087
New Hampshire	80	37	120	79	158	291
Rhode Island	79	46	77	55	78	111
Vermont	51	21	74	52	90	160
Middle Atlantic	2,850	1,500	3,055	2,511	3,022	4,815
New Jersey	480	323	590	519	658	1,183
New York	1,163	602	1,348	1,249	1,274	2,082
Pennsylvania	1,207	575	1,118	743	1,090	1,551
East North Central	3,308	1,685	4,142	3,034	4,385	7,038
Illinois	834	407	1,015	725	1,208	1,910
Indiana	431	223	587	400	650	1,039
Michigan	754	393	1,003	807	988	1,597
Ohio	876	501	1,037	755	1,057	1,673
Wisconsin	413	161	500	348	482	820
West North Central	1,447	668	1,888	1,317	2,020	3,371
Iowa	280	120	366	254	368	598
Kansas	206	94	261	187	271	478
Minnesota	283	129	420	254	421	661
Missouri	442	214	520	384	605	1,010
Nebraska	125	62	174	130	190	333
North Dakota	52	24	69	48	82	147
South Dakota	60	24	77	60	84	145
South Atlantic	3,094	1,750	4,244	3,383	4,870	8,480
Delaware	47	19	68	57	91	156
District of Columbia	40	50	38	54	42	106
Florida	1,012	543	1,285	932	1,462	2,576
Georgia	401	243	571	465	698	1,166
Maryland	270	227	324	459	391	1,048
North Carolina	484	255	720	543	812	1,371
South Carolina	248	118	404	282	468	701
Virginia	407	226	590	426	665	1,009
West Virginia	185	69	245	164	240	348
East South Central	1,151	538	1,635	1,102	1,823	2,701
Alabama	308	155	424	261	483	648
Kentucky	284	126	399	228	467	699
Mississippi	192	92	292	254	325	571
Tennessee	366	165	520	360	549	782
West South Central	1,522	963	2,107	1,848	2,506	4,331
Arkansas	195	86	267	180	299	419
Louisiana	273	229	339	360	383	723
Oklahoma	218	105	294	210	351	486
Texas	836	542	1,206	1,098	1,473	2,703
Mountain	792	387	1,047	768	1,266	1,980
Arizona	201	180	233	169	296	468
Colorado	187	93	217	178	283	428
Idaho	75	29	108	74	118	205
Montana	66	4	101	64	111	182
Nevada	55	28	75	62	112	177
New Mexico	90	48	125	97	156	235
Utah	91	3	146	91	136	205
Wyoming	27	2	43	33	54	80

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B11.2—Medicare Part B (Supplementary Medical Insurance): Outpatient facilities persons served and program payments, by census division and state or other area, selected years 1991–2008—Continued

Census division and state or area	1991		2000		2008	
	Persons served (thousands)	Program payments (millions of dollars)	Persons served (thousands)	Program payments (millions of dollars)	Persons served (thousands)	Program payments (millions of dollars)
Pacific	1,816	1,308	2,000	1,720	2,542	4,319
Alaska	14	10	26	29	39	75
California	1,295	1,011	1,346	1,200	1,729	3,020
Hawaii	37	30	58	44	66	113
Oregon	195	91	225	143	244	353
Washington	275	166	345	303	465	757
Outlying areas ^a	136	47	182	112	74	147

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Includes utilization and expenditures for all outpatient facility types. Medicare program payments represent fee-for-service only and exclude amounts paid for managed care services.

Characterizations of persons served may differ slightly from those in other tables in this section because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

Statistics are subject to sampling error.

a. Includes unknown residence.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B12—Medicare Part B (Supplementary Medical Insurance): State buy-ins, by state or other area, selected years 1991–2010

State or area	1991	1995	2000	2004	2005	2006	2007	2008	2009	2010
All areas	3,640,121	4,705,625	5,425,048	6,305,467	6,577,577	6,885,326	7,082,006	7,292,444	7,434,151	7,703,292
Alabama	97,601	116,916	136,860	164,499	169,460	175,134	179,542	183,860	181,216	179,668
Alaska	4,539	6,193	8,486	10,318	10,748	11,465	11,904	12,218	12,393	12,908
Arizona	28,650	44,236	57,712	95,804	110,977	116,065	121,455	126,518	131,581	140,079
Arkansas	64,996	77,660	79,606	86,181	89,372	96,906	99,214	101,893	104,825	106,343
California	646,108	747,814	818,846	977,676	1,012,804	1,047,842	1,078,076	1,120,069	1,077,652	1,103,853
Colorado	36,470	46,660	55,325	61,140	61,294	64,505	68,264	72,451	75,845	79,980
Connecticut	23,535	48,047	53,141	66,664	66,191	66,968	67,876	70,682	73,426	94,154
Delaware	4,499	6,645	10,737	16,081	17,104	19,534	19,821	20,628	21,317	22,060
District of Columbia	12,791	14,152	14,233	15,586	15,246	15,365	15,584	16,023	17,680	20,102
Florida	196,992	271,430	342,109	406,006	431,764	459,146	470,337	490,437	519,540	553,625
Georgia	128,976	160,380	176,596	199,524	205,476	212,257	217,562	221,444	226,220	233,528
Hawaii	11,529	16,695	20,326	22,988	23,703	26,040	25,862	26,601	27,436	28,864
Idaho	9,127	12,931	17,081	22,291	23,482	24,628	26,030	26,744	28,039	28,945
Illinois	94,434	137,571	155,743	189,044	206,014	215,631	222,728	233,211	242,050	255,529
Indiana	60,297	76,460	87,543	105,011	109,669	114,933	120,079	120,825	124,312	133,816
Iowa	41,170	48,517	51,976	58,023	60,458	63,221	66,022	68,782	70,624	72,562
Kansas	26,960	34,708	41,217	46,175	47,707	49,483	50,732	51,829	53,624	56,096
Kentucky	76,456	97,978	117,697	126,343	126,468	134,469	137,602	140,970	143,692	148,188
Louisiana	87,570	112,090	117,179	132,498	139,802	140,291	141,009	148,875	153,719	158,370
Maine	22,176	29,453	36,946	43,800	46,510	52,560	64,164	78,157	83,374	84,602
Maryland	48,028	58,865	65,372	75,366	79,234	83,078	85,824	89,624	93,682	98,268
Massachusetts	89,163	125,859	152,587	170,689	178,691	188,576	191,171	195,461	196,817	199,370
Michigan	91,340	123,948	145,172	161,519	170,044	180,235	185,626	190,827	196,551	205,521
Minnesota	39,366	52,192	63,607	77,499	79,428	81,353	83,420	85,356	88,149	91,630
Mississippi	90,530	108,577	107,495	133,337	135,023	137,715	136,096	137,874	132,099	136,915
Missouri	55,116	72,659	88,343	103,449	109,561	110,734	113,722	117,954	122,450	126,577
Montana	10,058	11,031	12,828	13,917	14,455	15,097	15,456	15,811	16,170	17,587
Nebraska	11,358	16,146	20,520	23,082	24,210	25,243	25,640	27,030	27,638	34,020
Nevada	8,657	14,227	19,155	26,977	27,408	28,639	30,319	32,197	32,764	35,035
New Hampshire	3,807	5,405	7,434	10,732	11,584	12,597	13,454	14,669	15,872	17,381
New Jersey	95,795	122,923	146,705	153,231	159,110	169,804	170,280	170,807	175,716	179,273
New Mexico	22,246	29,855	37,330	44,642	49,333	52,078	53,757	56,797	59,163	62,640
New York	255,952	325,882	369,479	448,373	465,068	487,736	500,099	489,668	508,461	531,060
North Carolina	117,656	186,328	223,402	241,543	251,739	258,981	261,690	266,009	272,691	278,325
North Dakota	4,639	5,560	5,908	6,560	6,757	7,185	7,610	7,892	8,058	8,464
Ohio	112,598	164,044	171,139	195,792	204,905	223,726	234,958	247,445	258,318	273,167
Oklahoma	51,457	60,080	67,413	72,758	75,903	80,536	82,671	82,920	83,382	86,586
Oregon	28,537	43,642	59,169	69,610	70,927	72,394	75,113	78,272	81,990	87,068
Pennsylvania	127,519	162,788	206,468	232,885	242,552	258,675	268,833	274,566	284,189	295,984
Rhode Island	10,585	15,517	19,787	25,361	26,311	27,002	27,508	27,860	28,064	28,782
South Carolina	78,701	95,970	112,232	118,393	118,843	121,469	124,502	126,074	126,591	129,489
South Dakota	9,399	12,346	13,146	14,045	14,534	15,176	15,407	15,613	15,824	16,148
Tennessee	116,861	148,391	182,342	208,678	218,894	228,849	232,611	236,854	241,225	215,868
Texas	234,169	314,991	360,191	423,560	440,938	457,346	473,962	489,552	501,502	514,153
Utah	10,263	13,506	16,231	19,361	21,787	24,114	24,775	25,459	26,794	27,064
Vermont	8,223	12,428	13,754	15,079	15,509	20,857	21,831	22,078	22,212	22,798
Virginia	77,898	102,964	113,259	124,996	131,083	137,991	141,569	145,896	149,316	155,647
Washington	54,774	71,531	97,390	108,780	113,233	119,180	123,471	127,450	132,958	143,398
West Virginia	28,086	39,720	46,305	51,365	54,200	57,688	59,576	61,749	63,037	65,324
Wisconsin	67,516	75,247	74,101	79,889	83,383	85,661	87,901	90,928	93,984	96,201
Wyoming	3,505	5,265	6,444	7,454	7,749	8,015	8,135	8,458	8,736	9,087
Outlying areas										
Guam	443	669	417	375	409	647	633	537	645	693
Northern Mariana Islands	273	314	342	340	358	354	373	381	385	394
U.S. Virgin Islands	727	219	204	178	165	152	150	159	153	103

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Data are as of July except for 1995 data, which are as of June.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B13—Medicare Part D: Number of enrollees by type of plan, and Retiree Drug Subsidy (RDS) coverage, by census division, state, or other area, July 1, 2008

Census division and state or area	Total Part D and RDS enrollees	Medicare Part D			RDS ^a
		Total	Stand-alone prescription drug plan (PDP)	Medicare Advantage plan offering Part D coverage	
Total					
All areas	32,500,509	25,844,675	17,393,807	8,450,868	6,655,834
United States	32,048,011	25,415,765	17,337,420	8,078,345	6,632,246
New England	1,669,686	1,282,502	960,048	322,454	387,184
Connecticut	405,233	294,228	221,709	72,519	111,005
Maine	175,701	145,618	136,320	9,298	30,083
Massachusetts	758,461	572,817	398,169	174,648	185,644
New Hampshire	127,112	96,396	89,500	6,896	30,716
Rhode Island	129,048	116,530	58,428	58,102	12,518
Vermont	74,131	56,913	55,922	991	17,218
Middle Atlantic	4,755,025	3,638,473	2,214,118	1,424,355	1,116,552
New Jersey	934,078	653,504	538,054	115,450	280,574
New York	2,175,708	1,635,221	977,758	657,463	540,487
Pennsylvania	1,645,239	1,349,748	698,306	651,442	295,491
East North Central	5,219,755	3,604,317	2,711,739	892,578	1,615,438
Illinois	1,310,145	968,693	850,555	118,138	341,452
Indiana	698,878	505,461	445,315	60,146	193,417
Michigan	1,214,793	780,552	508,594	271,958	434,241
Ohio	1,417,976	907,066	589,647	317,419	510,910
Wisconsin	577,963	442,545	317,628	124,917	135,418
West North Central	2,305,542	1,994,958	1,527,286	467,672	310,584
Iowa	382,961	331,143	289,988	41,155	51,818
Kansas	281,360	250,364	219,991	30,373	30,996
Minnesota	573,228	497,684	298,172	199,512	75,544
Missouri	699,248	581,668	423,272	158,396	117,580
Nebraska	196,950	173,529	151,205	22,324	23,421
North Dakota	78,847	74,264	69,605	4,659	4,583
South Dakota	92,948	86,306	75,053	11,253	6,642
South Atlantic	6,174,753	4,895,133	3,504,427	1,390,706	1,279,620
Delaware	102,908	69,025	65,320	3,705	33,883
District of Columbia	38,318	34,256	27,423	6,833	4,062
Florida	2,298,224	1,847,931	1,020,515	827,416	450,293
Georgia	790,933	665,620	552,899	112,721	125,313
Maryland	463,251	318,178	270,466	47,712	145,073
North Carolina	1,040,550	814,013	636,629	177,384	226,537
South Carolina	502,350	382,413	311,904	70,509	119,937
Virginia	662,428	542,150	454,298	87,852	120,278
West Virginia	275,791	221,547	164,973	56,574	54,244
East South Central	2,178,300	1,795,465	1,396,117	399,348	382,835
Alabama	578,941	465,190	325,226	139,964	113,751
Kentucky	530,082	401,920	343,962	57,958	128,162
Mississippi	333,405	303,853	279,816	24,037	29,552
Tennessee	735,872	624,502	447,113	177,389	111,370
West South Central	3,186,757	2,577,620	1,938,210	639,410	609,137
Arkansas	351,276	301,091	254,374	46,717	50,185
Louisiana	478,784	392,998	275,735	117,263	85,786
Oklahoma	384,733	333,990	270,999	62,991	50,743
Texas	1,971,964	1,549,541	1,137,102	412,439	422,423
Mountain	1,917,723	1,601,391	873,553	727,838	316,332
Arizona	621,563	519,347	220,634	298,713	102,216
Colorado	410,000	333,402	166,881	166,521	76,598
Idaho	143,019	119,519	85,009	34,510	23,500
Montana	105,686	90,264	74,418	15,846	15,422
Nevada	215,189	179,405	83,871	95,534	35,784
New Mexico	201,826	177,925	115,974	61,951	23,901
Utah	171,820	140,614	88,634	51,980	31,206
Wyoming	48,620	40,915	38,132	2,783	7,705

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B13—Medicare Part D: Number of enrollees by type of plan, and Retiree Drug Subsidy (RDS) coverage, by census division, state, or other area, July 1, 2008—Continued

Census division and state or area	Total Part D and RDS enrollees	Medicare Part D			RDS ^a
		Total	Stand-alone prescription drug plan (PDP)	Medicare Advantage plan offering Part D coverage	
Pacific	4,640,470	4,025,906	2,211,922	1,813,984	614,564
Alaska	38,319	23,600	23,156	444	14,719
California	3,476,556	3,049,591	1,600,656	1,448,935	426,965
Hawaii	132,619	124,988	62,963	62,025	7,631
Oregon	412,067	365,866	185,845	180,021	46,201
Washington	580,909	461,861	339,302	122,559	119,048
Outlying areas ^b	452,498	428,910	56,387	372,523	23,588

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Characterization of enrollees may differ from that in other tables on Part D enrollment because of differences in sources and methodology.

- a. RDS provides a Medicare subsidy to employers and unions who continue assisting their Medicare-eligible retirees with prescription drug coverage.
- b. Includes unknown residence.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B14—Medicare Part D: Number of enrollees by Part D status, census division, state, or other area, July 1, 2008

Census division and state or area	Total Medicare enrollees	Medicare Part D				Retiree drug subsidy (RDS) ^a	Other creditable coverage ^b (no Part D plan or RDS)	No Part D plan, RDS, or other creditable coverage
		Total	Full low-income subsidy ^c	Partial low-income subsidy ^d	No low-income subsidy			
Total								
All areas	45,411,883	25,844,675	9,329,300	404,169	16,111,206	6,655,834	5,930,894	6,980,480
United States	44,384,954	25,415,765	9,313,202	403,846	15,698,717	6,632,246	5,864,381	6,472,562
New England	2,315,028	1,282,502	529,437	16,924	736,141	387,184	289,326	356,016
Connecticut	548,703	294,228	101,594	2,833	189,801	111,005	63,400	80,070
Maine	253,188	145,618	84,625	674	60,319	30,083	36,188	41,299
Massachusetts	1,018,689	572,817	242,885	8,557	321,375	185,644	114,089	146,139
New Hampshire	211,657	96,396	33,486	2,027	60,883	30,716	34,909	49,636
Rhode Island	177,874	116,530	40,182	2,080	74,268	12,518	26,122	22,704
Vermont	104,917	56,913	26,665	753	29,495	17,218	14,618	16,168
Middle Atlantic	6,395,097	3,638,473	1,338,752	53,781	2,245,940	1,116,552	692,242	947,830
New Jersey	1,282,636	653,504	216,257	11,635	425,612	280,574	144,703	203,855
New York	2,891,085	1,635,221	731,600	21,480	882,141	540,487	278,934	436,443
Pennsylvania	2,221,376	1,349,748	390,895	20,666	938,187	295,491	268,605	307,532
East North Central	7,032,922	3,604,317	1,227,708	61,182	2,315,427	1,615,438	734,578	1,078,589
Illinois	1,774,555	968,693	336,710	17,951	614,032	341,452	193,527	270,883
Indiana	964,240	505,461	167,293	10,530	327,638	193,417	118,826	146,536
Michigan	1,579,631	780,552	266,791	14,007	499,754	434,241	131,932	232,906
Ohio	1,840,714	907,066	316,278	15,211	575,577	510,910	186,900	235,838
Wisconsin	873,782	442,545	140,636	3,483	298,426	135,418	103,393	192,426
West North Central	3,149,354	1,994,958	543,201	28,429	1,423,328	310,584	442,602	401,210
Iowa	506,152	331,143	80,012	4,417	246,714	51,818	67,645	55,546
Kansas	417,996	250,364	65,589	4,177	180,598	30,996	68,353	68,283
Minnesota	749,065	497,684	126,114	5,166	366,404	75,544	88,602	87,235
Missouri	966,061	581,668	191,552	9,631	380,485	117,580	134,170	132,643
Nebraska	271,368	173,529	42,434	2,500	128,595	23,421	43,057	31,361
North Dakota	106,666	74,264	16,575	1,249	56,440	4,583	16,439	11,380
South Dakota	132,046	86,306	20,925	1,289	64,092	6,642	24,336	14,762
South Atlantic	8,905,146	4,895,133	1,812,687	91,338	2,991,108	1,279,620	1,430,591	1,299,802
Delaware	141,080	69,025	23,894	1,156	43,975	33,883	18,833	19,339
District of Columbia	75,125	34,256	21,062	380	12,814	4,062	21,015	15,792
Florida	3,211,813	1,847,931	593,655	23,728	1,230,548	450,293	464,848	448,741
Georgia	1,152,522	665,620	281,933	13,009	370,678	125,313	182,595	178,994
Maryland	744,564	318,178	118,898	6,351	192,929	145,073	151,906	129,407
North Carolina	1,404,787	814,013	330,176	19,857	463,980	226,537	184,482	179,755
South Carolina	723,726	382,413	165,498	9,894	207,021	119,937	120,232	101,144
Virginia	1,078,534	542,150	193,291	11,878	336,981	120,278	236,564	179,542
West Virginia	372,995	221,547	84,280	5,085	132,182	54,244	50,116	47,088
East South Central	3,020,818	1,795,465	840,038	39,480	915,947	382,835	436,383	406,135
Alabama	809,193	465,190	216,614	10,434	238,142	113,751	130,823	99,429
Kentucky	728,218	401,920	187,295	10,438	204,187	128,162	94,322	103,814
Mississippi	479,231	303,853	157,566	6,011	140,276	29,552	77,748	68,078
Tennessee	1,004,176	624,502	278,563	12,597	333,342	111,370	133,490	134,814
West South Central	4,545,487	2,577,620	1,100,004	54,295	1,423,321	609,137	679,347	679,383
Arkansas	508,767	301,091	128,530	7,167	165,394	50,185	85,878	71,613
Louisiana	656,392	392,998	183,592	8,280	201,126	85,786	77,099	100,509
Oklahoma	578,488	333,990	119,307	6,683	208,000	50,743	99,331	94,424
Texas	2,801,840	1,549,541	668,575	32,165	848,801	422,423	417,039	412,837
Mountain	2,788,081	1,601,391	458,141	22,148	1,121,102	316,332	449,395	420,963
Arizona	869,591	519,347	152,191	5,612	361,544	102,216	128,431	119,597
Colorado	579,322	333,402	90,687	4,575	238,140	76,598	89,513	79,809
Idaho	214,247	119,519	34,166	2,127	83,226	23,500	35,328	35,900
Montana	160,441	90,264	24,220	1,878	64,166	15,422	27,426	27,329
Nevada	330,003	179,405	46,295	2,707	130,403	35,784	56,995	57,819
New Mexico	294,269	177,925	66,378	2,740	108,807	23,901	47,616	44,827
Utah	264,086	140,614	33,692	1,850	105,072	31,206	49,631	42,635
Wyoming	76,122	40,915	10,512	659	29,744	7,705	14,455	13,047

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B14—Medicare Part D: Number of enrollees by Part D status, census division, state, or other area, July 1, 2008—Continued

Census division and state or area	Total Medicare enrollees	Medicare Part D				Retiree drug subsidy (RDS) ^a	Other creditable coverage ^b (no Part D plan or RDS)	No Part D plan, RDS, or other creditable coverage
		Total	Full low-income subsidy ^c	Partial low-income subsidy ^d	No low-income subsidy			
Pacific	6,233,021	4,025,906	1,463,234	36,269	2,526,403	614,564	709,917	882,634
Alaska	59,781	23,600	14,282	281	9,037	14,719	10,472	10,990
California	4,491,586	3,049,591	1,171,742	23,337	1,854,512	426,965	441,983	573,047
Hawaii	194,183	124,988	34,862	1,393	88,733	7,631	32,614	28,950
Oregon	584,222	365,866	93,170	5,236	267,460	46,201	81,111	91,044
Washington	903,249	461,861	149,178	6,022	306,661	119,048	143,737	178,603
Outlying areas ^e	1,026,929	428,910	16,098	323	412,489	23,588	66,513	507,918

SOURCE: Centers for Medicare & Medicaid Services.

- a. RDS provides a Medicare subsidy to employers and unions who continue assisting their Medicare-eligible retirees with prescription drug coverage.
- b. Creditable coverage is alternative prescription drug coverage in which the actuarial value of the coverage equals or exceeds the actuarial value of standard Medicare prescription drug coverage.
- c. Individuals are automatically eligible for the full low-income subsidy (LIS) if they are dually eligible for Medicare and Medicaid benefits, enrolled in a Medicare savings program, or receiving Supplemental Security Income.
- d. Individuals not automatically eligible for full LIS must apply for LIS coverage. Applicants may be found eligible for full or partial LIS, depending on their income and resources.
- e. Includes unknown residence.

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Table 8.C1—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of facilities and beds, by type of participating provider, December 1967–2009, selected years

Year	Hospitals			Skilled nursing facilities	Home health agencies	Clinical Laboratory Improvement Act/ independent laboratories ^a
	All hospitals	General ^b	Psychiatric			
<i>Facilities</i>						
1967	6,829	6,501	328	4,405	1,890	2,355
1970	6,779	6,444	335	4,494	2,333	2,750
1975	6,770	6,383	387	3,932	2,290	3,174
1976	6,774	6,368	406	3,992	2,353	3,156
1977	6,755	6,353	402	4,461	2,496	3,249
1978	6,848	6,432	416	4,982	2,715	3,384
1979	6,780	6,372	408	5,055	2,858	3,448
1980	6,736	6,325	411	5,155	3,012	3,374
1981	6,749	6,335	414	5,295	3,169	3,511
1982	6,737	6,321	416	5,510	3,627	3,643
1983	6,687	6,257	430	5,760	4,235	3,708
1984	6,676	6,228	448	6,183	5,237	3,890
1985	6,710	6,209	501	6,725	5,932	4,029
1986	6,731	6,189	542	7,148	5,953	4,298
1987	6,715	6,130	585	7,379	5,769	4,487
1988	6,658	6,044	614	7,683	5,673	4,676
1989	6,547	5,891	656	8,688	5,661	4,828
1990	6,522	5,848	674	9,008	5,730	4,881
1991	6,471	5,759	712	10,061	5,963	4,898
1992	6,433	5,722	711	10,910	6,461	4,942
1993	6,473	5,738	735	11,472	7,000	156,117
1994	6,414	5,705	709	12,584	7,827	151,422
1995	6,376	5,694	682	13,452	8,447	156,511
1996	6,273	5,627	646	14,177	9,850	157,876
1997	6,293	5,639	654	14,860	10,807	164,054
1998	6,116	5,514	602	15,032	9,330	166,817
1999	5,985	5,415	570	14,913	7,857	171,018
2000	6,031	5,512	519	14,841	7,099	168,333
2001	6,002	5,508	494	14,755	6,813	173,807
2002	6,024	5,537	487	14,838	6,928	176,947
2003	6,057	5,579	478	14,939	7,138	184,466
2004	6,117	5,647	470	14,986	7,519	189,340
2005	6,180	5,707	473	15,006	8,090	196,296
2006	6,177	5,695	482	15,028	8,618	199,817
2007	6,163	5,673	490	15,054	9,024	206,065
2008	6,171	5,680	491	15,032	9,407	210,872
2009	6,172	5,666	506	15,071	10,184	218,139
<i>Beds</i>						
1967	1,141,155	837,211	303,944	308,843	...	...
1970	1,190,309	878,509	311,800	325,415	...	...
1975	1,136,908	939,717	197,191	287,468	...	...
1976	1,169,433	980,805	188,628	332,515	...	...
1977	1,130,519	976,465	154,054	381,715	...	...
1978	1,154,250	1,015,645	138,605	414,188	...	...
1979	1,152,088	1,016,525	135,563	433,715	...	...
1980	1,145,245	1,017,794	127,451	448,007	...	...
1981	1,152,877	1,032,042	120,835	463,715	...	...
1982	1,146,480	1,044,427	102,053	497,056	...	...
1983	1,143,544	1,046,674	96,870	519,551	...	...
1984	1,146,093	1,050,832	95,261	548,201	...	...
1985	1,144,589	1,046,889	97,700	--	...	...
1986	1,137,853	1,043,430	94,423	444,326	...	...
1987	1,124,928	1,030,556	94,372	449,867	...	...
1988	1,115,809	1,022,116	93,693	476,447	...	...
1989	1,106,295	1,008,845	97,450	507,475	...	...
1990	1,104,703	1,005,480	99,223	512,107	...	...

(Continued)

8.C Medicare: Participating Facilities

Table 8.C1—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of facilities and beds, by type of participating provider, December 1967–2009, selected years—Continued

Year	Hospitals			Skilled nursing facilities	Home health agencies	Clinical Laboratory Improvement Act/independent laboratories ^a
	All hospitals	General ^b	Psychiatric			
1991	1,102,286	1,003,147	99,139	583,116	...	...
1992	1,093,895	997,695	96,200	606,218	...	...
1993	1,094,422	994,847	99,575	622,534	...	...
1994	1,074,371	985,809	88,562	649,054	...	...
1995	1,056,454	970,143	86,311	657,225	...	...
1996	1,038,105	955,604	82,501	671,839	...	...
1997	1,037,356	954,372	82,984	684,977	...	...
1998	1,012,168	934,635	77,533	722,626	...	...
1999	993,901	920,326	73,575	836,720	...	...
2000	982,616	913,806	68,810	939,364	...	...
2001	968,761	901,688	67,073	1,104,978	...	...
2002	957,898	897,076	60,822	1,260,625	...	...
2003	951,628	894,457	57,171	1,371,815	...	...
2004	949,694	894,022	55,672	1,437,254	...	...
2005	947,305	892,253	55,052	1,478,277	...	...
2006	938,762	884,450	54,312	1,507,368	...	...
2007	933,998	796,931	54,251	1,532,267	...	...
2008	930,452	876,376	54,076	1,546,721	...	...
2009	926,388	870,812	55,576	1,561,299	...	...

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: ... = not applicable; -- = not available.

- a. Beginning in 1993, the data include all Clinical Laboratory Improvement Act facilities as of December of each year.
- b. Includes short-stay and other long-stay hospitals.

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Table 8.C2—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of participating hospitals and certified beds, by type of hospital, census division, and state or other area, December 2009

Census division and state or area	All hospitals		Short-stay and critical access hospitals ^a			Other non-short-stay ^b	
	Hospitals	Beds	Hospitals	Beds	Beds per 1,000 enrollees ^c	Hospitals	Beds
Total							
All areas	6,172	926,388	4,917	815,046	17.6	1,255	111,342
United States	6,108	914,683	4,860	804,120	17.8	1,248	110,563
New England	257	43,292	189	32,796	13.9	68	10,496
Connecticut	43	10,093	32	8,205	14.8	11	1,888
Maine	43	4,081	38	3,595	13.9	5	486
Massachusetts	111	20,114	68	13,388	12.9	43	6,726
New Hampshire	30	3,559	26	3,066	14.1	4	493
Rhode Island	15	3,657	11	2,903	16.3	4	754
Vermont	15	1,788	14	1,639	15.3	1	149
Middle Atlantic	567	126,306	431	107,717	16.7	136	18,589
New Jersey	100	26,619	67	22,456	17.4	33	4,163
New York	232	64,584	198	57,089	19.6	34	7,495
Pennsylvania	235	35,103	166	28,172	12.5	69	6,931
East North Central	921	150,253	747	136,489	19.2	174	13,764
Illinois	209	40,743	182	37,562	21.1	27	3,181
Indiana	166	18,989	123	17,030	17.3	43	1,959
Michigan	174	28,187	140	25,567	15.9	34	2,620
Ohio	226	43,853	178	40,027	21.6	48	3,826
Wisconsin	146	18,481	124	16,303	18.3	22	2,178
West North Central	782	74,298	703	68,163	21.3	79	6,135
Iowa	122	10,450	117	10,113	19.8	5	337
Kansas	159	11,532	145	10,513	24.8	14	1,019
Minnesota	144	15,464	131	14,311	18.7	13	1,153
Missouri	149	23,804	118	21,613	22.0	31	2,191
Nebraska	95	6,563	87	5,774	21.0	8	789
North Dakota	49	3,103	44	2,728	25.4	5	375
South Dakota	64	3,382	61	3,111	23.2	3	271
South Atlantic	897	174,929	697	154,854	17.0	200	20,075
Delaware	11	2,520	5	1,998	13.8	6	522
District of Columbia	14	4,153	7	3,287	44.0	7	866
Florida	240	59,038	180	53,897	16.4	60	5,141
Georgia	177	24,610	142	21,732	18.4	35	2,878
Maryland	64	15,470	47	12,993	17.1	17	2,477
North Carolina	134	26,656	115	22,634	15.6	19	4,022
South Carolina	80	13,649	60	11,904	16.0	20	1,745
Virginia	114	19,881	89	18,272	16.6	25	1,609
West Virginia	63	8,952	52	8,137	21.6	11	815
East South Central	506	74,300	413	67,142	21.8	93	7,158
Alabama	128	19,295	101	17,282	21.0	27	2,013
Kentucky	118	17,462	95	15,225	20.7	23	2,237
Mississippi	111	13,024	96	12,046	24.7	15	978
Tennessee	149	24,519	121	22,589	22.0	28	1,930
West South Central	1,047	113,686	736	95,258	20.4	311	18,428
Arkansas	103	10,445	78	8,632	16.6	25	1,813
Louisiana	225	20,694	127	16,188	24.2	98	4,506
Oklahoma	153	14,594	126	13,155	22.3	27	1,439
Texas	566	67,953	405	57,283	19.8	161	10,670
Mountain	499	53,371	405	46,368	16.2	94	7,003
Arizona	104	16,165	80	14,046	15.7	24	2,119
Colorado	97	12,488	75	10,676	18.0	22	1,812
Idaho	51	3,403	42	2,954	13.3	9	449
Montana	64	3,143	61	2,950	17.9	3	193
Nevada	51	6,476	36	5,431	15.9	15	1,045
New Mexico	52	4,899	42	4,457	14.9	10	442
Utah	50	5,256	42	4,438	16.4	8	818
Wyoming	30	1,541	27	1,416	18.1	3	125

(Continued)

8.C Medicare: Participating Facilities

Table 8.C2—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of participating hospitals and certified beds, by type of hospital, census division, and state or other area, December 2009—Continued

Census division and state or area	All hospitals		Short-stay and critical access hospitals ^a			Other non-short-stay ^b	
	Hospitals	Beds	Hospitals	Beds	Beds per 1,000 enrollees ^c	Hospitals	Beds
Pacific	632	104,248	539	95,333	15.2	93	8,915
Alaska	25	1,607	22	1,342	21.5	3	265
California	419	78,468	348	72,073	16.1	71	6,395
Hawaii	27	2,735	23	2,331	11.7	4	404
Oregon	62	7,962	58	7,807	13.1	4	155
Washington	99	13,476	88	11,780	12.6	11	1,696
Outlying areas	64	11,705	57	10,926	16.0	7	779
Puerto Rico	59	11,020	52	10,241	15.7	7	779
U.S. Virgin Islands	2	320	2	320	21.0	0	0
Other	3	365	3	365	22.5	0	0

SOURCE: Centers for Medicare & Medicaid Services.

- a. Critical access hospitals are included with short-stay hospitals because, though not subject to one of the Medicare inpatient hospital prospective payment systems, they essentially function as and are viewed as short-stay hospitals by their communities.
- b. Other non-short-stay hospitals include long-term hospitals, psychiatric hospitals, rehabilitation hospitals, children's hospitals, and religious nonmedical institutions.
- c. Based on total number of persons enrolled in the Hospital Insurance program as of July 1, 2009.

CONTACT: Maria Diacogiannis (410) 786-0178 or supplement@ssa.gov.

Table 8.C3—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of participating skilled nursing facilities, home health agencies, Clinical Laboratory Improvement Act facilities, and end-stage renal disease facilities, by census division and state or other area, December 2009

Census division and state or area	Skilled nursing facilities			Home health agencies	Clinical Laboratory Improvement Act facilities	End-stage renal disease facilities
	Number	Beds	Beds per 1,000 enrollees ^a			
Total						
All areas	15,071	1,561,299	33.8	10,184	218,139	5,476
United States	15,062	1,560,946	34.6	10,128	216,853	5,429
New England	971	101,137	43.0	319	9,804	172
Connecticut	239	28,810	51.9	85	2,680	38
Maine	109	6,325	24.5	30	1,044	17
Massachusetts	422	46,846	45.1	134	3,858	81
New Hampshire	75	7,351	33.9	35	962	11
Rhode Island	86	8,603	48.4	23	763	16
Vermont	40	3,202	29.8	12	497	9
Middle Atlantic	1,702	253,611	39.3	599	24,524	607
New Jersey	359	49,861	38.7	51	5,712	120
New York	638	118,678	40.7	195	10,718	236
Pennsylvania	705	85,072	37.8	353	8,094	251
East North Central	2,948	287,312	40.3	1,960	35,059	886
Illinois	714	68,031	38.1	593	9,233	220
Indiana	484	45,927	46.7	196	5,159	131
Michigan	413	45,300	28.1	523	7,377	167
Ohio	962	93,026	50.2	523	9,850	254
Wisconsin	375	35,028	39.3	125	3,440	114
West North Central	1,927	152,641	47.7	818	16,931	411
Iowa	417	29,004	56.8	173	2,891	64
Kansas	270	19,203	45.3	132	2,480	46
Minnesota	375	31,649	41.3	207	3,265	95
Missouri	487	46,310	47.1	177	5,088	130
Nebraska	200	14,313	52.0	70	1,800	34
North Dakota	83	6,305	58.6	21	575	17
South Dakota	95	5,857	43.6	38	832	25
South Atlantic	2,294	251,082	27.5	1,922	45,896	1,215
Delaware	39	4,335	30.0	20	800	21
District of Columbia	18	2,653	35.5	27	462	18
Florida	673	79,207	24.1	1,231	16,553	324
Georgia	355	38,012	32.2	103	7,283	273
Maryland	226	27,956	36.7	51	3,563	120
North Carolina	423	42,519	29.4	169	6,844	173
South Carolina	178	18,282	24.6	68	3,598	113
Virginia	262	28,528	25.9	196	4,962	142
West Virginia	120	9,590	25.4	57	1,831	31
East South Central	989	96,570	31.4	450	14,828	431
Alabama	229	26,459	32.2	150	3,743	120
Kentucky	287	25,059	34.1	103	3,628	89
Mississippi	172	15,790	32.4	55	2,328	73
Tennessee	301	29,262	28.4	142	5,129	149
West South Central	1,902	203,946	43.7	2,507	29,379	744
Arkansas	214	21,556	41.5	170	2,084	65
Louisiana	283	34,855	52.0	219	3,834	150
Oklahoma	285	26,284	44.5	236	3,206	72
Texas	1,120	121,251	41.9	1,882	20,255	457
Mountain	734	67,061	23.4	601	13,587	328
Arizona	135	14,306	16.0	102	4,332	111
Colorado	197	18,136	30.6	145	2,900	64
Idaho	79	6,154	27.8	45	978	22
Montana	89	6,839	41.6	36	714	12
Nevada	47	5,092	14.9	91	1,471	37
New Mexico	66	6,320	21.1	72	1,302	36
Utah	88	7,484	27.6	83	1,487	37
Wyoming	33	2,730	34.9	27	403	9

(Continued)

8.C Medicare: Participating Facilities

Table 8.C3—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of participating skilled nursing facilities, home health agencies, Clinical Laboratory Improvement Act facilities, and end-stage renal disease facilities, by census division and state or other area, December 2009—Continued

Census division and state or area	Skilled nursing facilities			Home health agencies	Clinical Laboratory Improvement Act facilities	End-stage renal disease facilities
	Number	Beds	Beds per 1,000 enrollees ^a			
Pacific	1,595	147,586	23.5	952	26,845	635
Alaska	15	561	9.0	15	563	8
California	1,189	111,946	24.9	808	19,794	486
Hawaii	44	3,952	19.8	14	802	22
Oregon	120	10,536	17.6	56	2,370	54
Washington	227	20,591	22.0	59	3,316	65
Outlying areas	9	353	0.5	56	1,286	47
Puerto Rico	7	283	0.4	48	1,138	37
U.S. Virgin Islands	1	40	2.6	2	45	3
Other	1	30	1.9	6	103	7

SOURCE: Centers for Medicare & Medicaid Services.

a. Based on total number of beneficiaries enrolled in the Hospital Insurance program as of July 1, 2009.

CONTACT: Maria Diacogiannis (410) 786-0178 or supplement@ssa.gov.

Table 8.E1—Number of recipients, total vendor payments, and average payment, by type of medical service, fiscal years 1985–2008

Year	Total ^a	Inpatient services in—		Intermediate care facility services for—		Nursing facility ^b	Physicians ¹	Dental	Other practitioner	Out-patient hospital	Clinic	Laboratory and radio-logical	Home health	Pre-scribed drugs	Family plan-ning	Other ^c
		General hospital	Mental hospital	Intellectually disabled ^d	All other											
Number of recipients (thousands)																
1985	21,814	3,434	60	147	828	547	14,387	4,672	3,357	10,072	2,121	6,354	535	13,921	1,636	5,371
1986	22,515	3,544	53	145	828	571	14,894	5,161	3,451	10,702	2,027	7,123	593	14,704	1,732	5,573
1987	23,109	3,767	57	149	849	572	15,373	5,131	3,542	10,979	2,183	7,596	609	15,083	1,652	5,957
1988	22,907	3,832	60	145	866	579	15,265	5,072	3,480	10,533	2,256	7,579	569	15,323	1,525	6,601
1989	23,511	4,170	90	148	888	564	15,686	4,214	3,555	11,344	2,391	7,759	609	15,916	1,564	7,278
1990	25,255	4,593	92	147	860	601	17,078	4,552	3,873	12,370	2,804	8,959	719	17,294	1,752	8,302
1991	28,280	5,072	65	146	^b 1,500	19,321	5,209	4,282	4,282	14,137	3,511	10,505	813	19,602	2,185	10,319
1992	30,926	5,768	77	151	^b 1,573	21,627	5,700	4,711	4,711	15,120	4,115	11,804	925	22,030	2,550	12,427
1993	33,432	5,894	75	149	^b 1,610	23,746	6,174	5,229	5,229	16,436	4,839	12,970	1,067	23,901	2,538	15,035
1994	35,053	5,866	85	159	^b 1,639	24,267	6,352	5,409	5,409	16,567	5,258	13,412	1,293	24,471	2,566	17,321
1995	36,282	5,561	84	151	^b 1,667	23,789	6,383	5,528	5,528	16,712	5,322	13,064	1,639	23,723	2,501	19,277
1996	36,118	5,362	93	140	^b 1,594	22,861	6,208	5,343	5,343	15,905	5,070	12,607	1,727	22,585	2,366	21,104
1997	34,873	4,746	87	136	^b 1,603	21,170	5,935	5,142	5,142	13,632	4,713	11,074	1,861	20,954	2,091	20,284
1998	40,649	4,273	135	126	^b 1,646	18,555	4,965	4,342	4,342	12,158	5,285	9,381	1,225	19,338	2,011	34,820
1999	40,300	4,479	96	121	^b 1,624	18,052	5,577	3,945	3,945	12,323	6,660	10,103	808	19,428	...	37,484
2000	42,886	4,912	99	118	^b 1,705	18,965	5,922	4,758	4,758	13,169	7,677	11,438	1,007	20,324	...	40,732
2001	46,163	4,879	91	116	^b 1,702	20,021	7,018	5,102	5,102	13,731	8,463	12,339	1,013	21,910	...	44,608
2002	49,329	5,046	100	117	^b 1,760	22,065	7,881	5,566	5,566	14,831	9,491	14,062	1,064	24,380	...	49,556
2003	51,971	5,217	105	114	^b 1,691	22,857	8,510	5,746	5,746	15,511	10,162	14,687	1,184	26,075	...	53,128
2004	55,002	5,425	117	114	^b 1,709	23,612	9,037	5,933	5,933	15,888	11,102	15,875	1,146	27,549	...	69,340
2005 ^e	57,643	5,488	120	109	^b 1,712	24,204	9,328	5,904	5,904	16,314	11,913	16,020	1,195	28,385	...	74,296
2006 ^f	57,732	6,268	138	107	^b 1,722	23,265	9,514	5,881	5,881	16,015	11,858	16,202	1,191	27,310	...	76,864
2007 ^g	56,825	5,126	112	104	^b 1,644	22,054	9,530	5,425	5,425	14,970	11,732	15,808	1,190	23,944	...	62,604
2008 ^h	58,705	5,256	108	102	^b 1,616	21,656	9,807	5,160	5,160	14,773	11,843	15,600	1,143	24,583	...	65,412
Total vendor payments (millions of dollars)																
1985	37,508	9,453	1,192	4,731	6,516	5,071	2,346	458	251	1,789	714	337	1,120	2,315	195	1,020
1986	41,005	10,364	1,113	5,072	6,773	5,660	2,547	531	252	1,980	807	424	1,352	2,692	226	1,212
1987	45,050	11,302	1,409	5,591	7,280	5,967	2,776	541	263	2,226	963	475	1,690	2,988	228	1,349
1988	48,710	12,076	1,375	6,022	7,923	6,354	2,953	577	284	2,413	1,105	543	2,015	3,294	206	1,569
1989	54,500	13,378	1,470	6,649	8,871	6,660	3,408	498	317	2,837	1,249	590	2,572	3,689	227	2,085
1990	64,859	16,674	1,714	7,354	9,667	8,026	4,018	593	372	3,324	1,688	721	3,404	4,420	265	2,618
1991	77,048	19,891	2,010	7,680	^b 20,709	4,952	710	437	437	4,283	2,211	897	4,101	5,424	359	3,384
1992	90,814	23,503	2,196	8,550	^b 23,544	6,102	851	538	538	5,279	2,818	1,035	4,886	6,765	500	4,243
1993	101,709	25,734	2,161	8,831	^b 25,431	6,952	961	937	937	6,215	3,457	1,137	5,601	7,970	538	5,784
1994	108,270	26,180	2,057	8,347	^b 27,095	7,189	969	1,040	1,040	6,342	3,747	1,176	7,042	8,875	516	7,695
1995	120,141	26,331	2,511	10,383	^b 29,052	7,360	1,019	986	986	6,627	4,280	1,180	9,406	9,791	514	10,700
1996	121,685	25,176	2,040	9,555	^b 29,630	7,238	1,028	1,094	1,094	6,504	4,222	1,208	10,868	10,697	474	11,948
1997	124,429	23,143	2,009	9,798	^b 30,504	7,041	1,036	979	979	6,169	4,252	1,033	12,237	11,972	418	12,958
1998	142,318	21,499	2,801	9,482	^b 31,892	6,070	901	587	587	5,759	3,921	939	2,702	13,522	449	38,747
1999	147,372	21,341	1,638	8,756	^b 31,976	6,420	1,155	464	464	5,895	5,439	1,143	2,714	15,933	...	44,492
2000	168,442	24,130	1,769	9,375	^b 34,527	6,809	1,413	663	663	7,081	6,137	1,292	3,133	19,898	...	52,209
2001	186,913	25,943	1,959	9,700	^b 37,322	7,438	1,896	761	761	7,496	5,602	1,622	3,520	23,764	...	59,884
2002	213,497	29,123	2,128	10,676	^b 39,286	8,349	2,309	842	842	8,469	6,704	2,160	3,926	28,404	...	71,121
2003	233,206	31,549	2,143	10,861	^b 40,381	9,210	2,595	882	882	9,252	7,312	2,365	4,404	33,714	...	78,537
2004	257,748	34,914	2,326	11,193	^b 42,008	10,061	2,867	951	951	10,261	8,336	2,695	4,566	39,476	...	88,096
2005 ^e	275,569	35,347	2,333	11,730	^b 44,675	11,278	3,045	1,182	1,182	10,228	8,986	2,927	5,361	42,830	...	95,649
2006 ^f	268,505	36,466	2,392	11,854	^b 45,674	10,581	3,123	1,148	1,148	10,454	8,736	2,988	5,917	28,243	...	100,930
2007 ^g	276,539	36,894	2,406	11,759	^b 46,629	10,066	3,240	921	921	10,421	8,730	2,927	6,323	22,312	...	113,394
2008 ^h	296,560	37,219	2,373	12,556	^b 47,693	10,502	3,810	883	883	10,883	9,114	2,926	6,602	23,540	...	127,180

(Continued)

8.E Medicaid: Recipients

Table 8.E1—Number of recipients, total vendor payments, and average payment, by type of medical service, fiscal years 1985–2008—Continued

Year	Total ^a	Inpatient services in—		Intermediate care facility services for—		Nursing facility ^b	Physicians'	Dental	Other practitioner	Out-patient hospital	Clinic	Laboratory and radiological	Home health	Pre-scribed drugs	Family planning	Other ^c
		General hospital	Mental hospital	Intellectually disabled ^d	All other											
<i>Average payment (dollars)</i>																
1985	1,719	2,753	20,021	32,238	7,868	9,278	163	98	75	178	337	53	2,092	166	119	190
1986	1,821	2,924	20,952	35,089	8,182	9,910	171	103	73	185	398	60	2,278	183	130	217
1987	1,949	3,000	24,714	37,490	8,571	10,432	181	105	74	203	441	63	2,777	198	138	227
1988	2,126	3,151	22,956	41,413	9,153	10,971	193	114	82	229	490	72	3,542	215	135	238
1989	2,318	3,208	16,397	44,999	9,994	11,809	217	118	89	250	523	76	4,225	232	145	286
1990	2,568	3,630	18,548	50,048	11,236	13,356	235	130	96	269	602	80	4,733	256	151	315
1991	2,725	3,922	30,948	52,750	^b	13,811	256	136	102	303	630	85	5,048	277	164	328
1992	2,936	4,075	28,364	56,502	^b	14,965	282	149	114	349	685	88	5,283	307	196	342
1993	3,042	4,366	28,948	59,156	^b	15,798	293	156	179	378	714	88	5,250	333	212	385
1994	3,089	4,463	24,120	52,571	^b	16,533	296	153	192	383	713	88	5,445	363	201	444
1995	3,311	4,735	29,847	68,613	^b	17,424	309	160	178	397	804	90	5,740	413	206	555
1996	3,369	4,696	21,873	68,232	^b	18,589	317	166	205	409	833	96	6,293	474	200	566
1997	3,568	4,877	22,990	72,033	^b	19,029	333	275	190	453	902	93	6,575	571	200	639
1998	3,501	5,031	20,701	74,960	^b	19,379	327	182	135	474	742	100	2,206	699	223	1,113
1999	3,657	4,764	16,913	72,180	^b	19,688	356	207	118	478	817	113	3,356	820	...	1,187
2000	3,928	4,912	17,780	78,882	^b	20,240	359	239	139	538	799	113	3,111	979	...	1,282
2001	4,049	5,317	21,482	83,191	^b	21,926	372	270	149	546	662	132	3,473	1,085	...	1,342
2002	4,328	5,771	21,377	91,588	^b	22,326	378	293	151	571	706	154	3,689	1,165	...	1,435
2003	4,487	6,047	20,503	95,287	^b	23,882	403	305	154	596	720	161	3,720	1,293	...	1,478
2004	4,686	6,435	19,928	98,281	^b	24,585	426	317	160	646	751	170	3,984	1,433	...	1,270
2005 ^e	4,781	6,441	19,397	107,205	^b	26,097	466	326	200	627	754	183	4,487	1,509	...	1,287
2006 ^f	4,651	5,818	17,327	110,385	^b	26,519	455	328	195	653	737	184	4,970	1,034	...	1,313
2007 ^g	4,867	7,197	21,433	113,545	^b	28,368	456	340	170	696	744	185	5,313	932	...	1,811
2008 ^h	5,052	7,082	21,964	123,032	^b	29,515	485	388	171	737	770	188	5,773	958	...	1,944

SOURCE: Data before 1999 are from HCFA Form 2082, and data onward are from Medicaid Statistical Information System (MSIS) State Summary Data, Centers for Medicare & Medicaid Services.

NOTES: Beginning with 1999, excludes recipients in Puerto Rico and the U.S. Virgin Islands. Data are not available.

Totals do not necessarily equal the sum of rounded components.

... = not applicable.

- a. Total represents the unduplicated number of recipients receiving any type of medical service during the year.
- b. Beginning in fiscal year 1991, "Nursing facility services" category combines "Intermediate care facility services, All other" and "Skilled nursing facility services," which were previously separate. Data under "Nursing facility services" before 1991 reflect "Skilled nursing facility services."
- c. Beginning in 1998, several new medical services were combined with "Other" (excludes unknowns).
- d. The term "mentally retarded" has been replaced by "intellectually disabled." This change in terminology does not affect the data presented.
- e. Fiscal year 2005 data are not available for Maine. Fiscal year 2004 data have been substituted.
- f. Fiscal year 2006 data are not available for Maine and Nevada. Fiscal year 2004 data have been substituted for Maine, and fiscal year 2005 data have been substituted for Nevada.
- g. Fiscal year 2007 data are not available for Hawaii and Maine. Fiscal year 2006 data have been substituted for Hawaii, and fiscal year 2005 data have been substituted for Maine.
- h. Fiscal year 2008 data are not available for Hawaii and Utah. Fiscal year 2007 data have been substituted.

CONTACT: Loan Swisher (410) 786-4650 or supplement@ssa.gov.

Table 8.E2—Number of recipients, total vendor payments, and average payment, by type of eligibility category, fiscal years 1985–2008

Year	Total ^a	Aged 65 or older	Blind	Permanent and total disability	Dependent children under age 21	Adults in families with dependent children	Other
<i>Number of recipients (thousands)</i>							
1985	21,814	3,061	80	2,937	9,757	5,518	1,214
1986	22,515	3,140	82	3,100	10,029	5,647	1,362
1987	23,109	3,224	85	3,296	10,168	5,599	1,418
1988	22,907	3,159	86	3,401	10,037	5,503	1,343
1989	23,511	3,132	95	3,496	10,318	5,717	1,175
1990	25,255	3,202	83	3,635	11,220	6,010	1,105
1991	28,280	3,359	85	3,983	13,415	6,778	658
1992	30,926	3,742	84	4,378	15,104	6,954	664
1993	33,432	3,863	84	4,932	16,285	7,505	763
1994	35,053	4,035	87	5,372	17,194	7,586	779
1995	36,282	4,119	92	5,767	17,164	7,604	1,537
1996	36,118	4,285	95	6,126	16,739	7,127	1,746
1997	34,872	3,955	...	6,129	15,791	6,803	2,195
1998	40,649	3,964	...	6,638	18,964	7,908	3,176
1999	40,300	4,241	...	7,303	20,119	8,552	846
2000	42,886	4,289	...	7,479	21,086	10,543	862
2001	46,163	4,420	...	7,703	22,533	11,639	869
2002	49,329	3,890	...	7,411	22,421	11,253	4,354
2003	51,971	4,041	...	7,669	23,992	11,679	4,591
2004	55,002	4,318	...	7,933	25,613	12,225	4,913
2005 ^b	57,643	4,396	...	8,210	26,337	12,529	6,171
2006 ^c	57,732	4,375	...	8,332	26,771	12,598	5,656
2007 ^d	56,825	4,043	...	8,424	26,584	12,371	5,402
2008 ^e	58,705	4,144	...	8,689	28,043	12,891	4,939
<i>Total vendor payments (millions of dollars)</i>							
1985	37,508	14,096	249	13,203	4,414	4,746	798
1986	41,005	15,097	277	14,635	5,135	4,880	980
1987	45,050	16,037	309	16,507	5,508	5,592	1,078
1988	48,710	17,135	344	18,250	5,848	5,883	1,198
1989	54,500	18,558	409	20,476	6,892	6,897	1,268
1990	64,859	21,508	434	23,969	9,100	8,590	1,257
1991	77,048	25,453	475	27,798	11,690	10,439	1,193
1992	90,814	29,078	530	33,326	14,491	12,185	1,204
1993	101,709	31,554	589	38,065	16,504	13,605	1,391
1994	108,270	33,618	644	41,654	17,302	13,585	1,467
1995	120,141	36,527	848	48,570	17,976	13,511	2,708
1996	121,685	36,947	869	51,196	17,544	12,275	2,853
1997	124,430	37,721	...	54,130	17,544	12,307	2,727
1998	142,318	40,602	...	60,375	22,806	14,833	3,702
1999	147,372	40,470	...	63,028	20,765	15,141	7,966
2000	168,442	44,560	...	72,772	23,490	17,671	9,948
2001	186,913	48,431	...	80,493	26,770	20,096	11,121
2002	213,497	52,012	...	92,414	31,595	23,525	13,950
2003	233,206	55,271	...	102,014	35,079	26,689	14,153
2004	257,748	59,541	...	111,614	39,194	30,522	16,877
2005 ^b	275,569	63,358	...	119,647	42,012	32,385	18,167
2006 ^c	268,505	58,109	...	116,209	44,645	32,871	16,670
2007 ^d	276,539	57,362	...	119,621	47,763	33,764	18,029
2008 ^e	296,560	61,116	...	128,945	57,073	37,133	12,294

(Continued)

8.E Medicaid: Recipients

Table 8.E2—Number of recipients, total vendor payments, and average payment, by type of eligibility category, fiscal years 1985–2008—Continued

Year	Total ^a	Aged 65 or older	Blind	Permanent and total disability	Dependent children under age 21	Adults in families with dependent children	Other
<i>Average payment (dollars)</i>							
1985	1,719	4,605	3,104	4,496	452	860	658
1986	1,821	4,808	3,401	4,721	512	864	719
1987	1,949	4,975	3,644	5,008	542	999	761
1988	2,126	5,425	4,005	5,366	583	1,069	891
1989	2,318	5,926	4,317	5,858	668	1,206	1,079
1990	2,568	6,717	5,212	6,595	811	1,429	1,138
1991	2,725	7,577	5,572	6,979	871	1,540	1,813
1992	2,936	7,770	6,298	7,612	959	1,752	1,813
1993	3,042	8,168	7,036	7,717	1,013	1,813	1,824
1994	3,089	8,331	7,412	7,755	1,006	1,791	1,884
1995	3,311	8,868	9,256	8,422	1,047	1,777	1,762
1996	3,369	8,622	9,143	8,357	1,048	1,722	1,635
1997	3,568	9,538	...	8,832	1,111	1,809	3,597
1998	3,501	10,242	...	9,095	1,203	1,876	1,166
1999	3,657	9,541	...	8,630	1,032	1,770	9,407
2000	3,928	10,388	...	9,729	1,114	1,676	11,536
2001	4,049	10,957	...	10,449	1,188	1,727	12,792
2002	4,328	13,370	...	12,470	1,409	2,091	3,204
2003	4,487	13,677	...	13,303	1,462	2,285	3,083
2004	4,686	13,790	...	14,070	1,530	2,497	3,435
2005 ^b	4,781	14,413	...	14,574	1,595	2,585	2,944
2006 ^c	4,651	13,283	...	13,947	1,668	2,609	2,947
2007 ^d	4,867	14,187	...	14,200	1,797	2,729	3,337
2008 ^e	5,052	14,748	...	14,840	2,035	2,881	2,489

SOURCE: Data before 1999 are from HCFA Form 2082, and data onward are from Medicaid Statistical Information System (MSIS) State Summary Data, Centers for Medicare & Medicaid Services.

NOTES: Totals do not necessarily equal the sum of rounded components.

Beginning in 1997, "Disability" includes blindness. "Children" includes foster care children, and "Other" are "Unknowns." In 1999 and 2000, "Other" includes foster care children and "Unknowns." In 2001 and 2002, "Other" includes foster care children, "Unknowns," and individuals covered under the Breast and Cervical Cancer Prevention and Treatment Act of 2000.

Beginning with 1999, excludes recipients in Puerto Rico and the U.S. Virgin Islands. Data are not available.

... = not applicable.

a. Total represents the unduplicated number of recipients receiving any type of medical service during the year.

b. Fiscal year 2005 data are not available for Maine. Fiscal year 2004 data have been substituted.

c. Fiscal year 2006 data are not available for Maine and Nevada. Fiscal year 2004 data have been substituted for Maine, and fiscal year 2005 data have been substituted for Nevada.

d. Fiscal year 2007 data are not available for Hawaii and Maine. Fiscal year 2006 data have been substituted for Hawaii, and fiscal year 2005 data have been substituted for Maine.

e. Fiscal year 2008 data are not available for Hawaii and Utah. Fiscal year 2007 data have been substituted.

CONTACT: Loan Swisher (410) 786-4650 or supplement@ssa.gov.

Table 8.H1—Number of recipients, total payments, and average payment, by state, fiscal year 2008

State	Number of recipients	Total payments (millions of dollars)	Average payment (dollars)
United States ^a	58,705,110	296,560	5,052
Alabama	829,815	3,508	4,227
Alaska	119,340	974	8,162
Arizona	1,398,542	6,584	4,707
Arkansas	826,911	3,251	3,932
California	10,514,516	32,245	3,067
Colorado	625,915	2,985	4,768
Connecticut	524,210	4,144	7,905
Delaware	180,795	1,137	6,290
District of Columbia	168,237	1,739	10,338
Florida	2,870,985	13,224	4,606
Georgia	1,711,976	6,863	4,009
Hawaii ^b	223,687	993	4,439
Idaho	233,056	1,263	5,419
Illinois	2,316,772	10,235	4,418
Indiana	1,126,436	4,941	4,387
Iowa	498,325	2,691	5,401
Kansas	350,971	2,296	6,541
Kentucky	893,008	4,475	5,011
Louisiana	1,156,601	4,991	4,316
Maine	305,581	1,355	4,435
Maryland	757,031	5,578	7,369
Massachusetts	1,230,063	8,991	7,310
Michigan	1,789,798	9,231	5,157
Minnesota	762,946	6,646	8,711
Mississippi	657,430	3,124	4,751
Missouri	1,054,099	5,225	4,957
Montana	113,015	655	5,792
Nebraska	249,193	1,536	6,165
Nevada	249,257	1,130	4,535
New Hampshire	131,056	935	7,137
New Jersey	1,065,155	7,713	7,241
New Mexico	507,400	3,058	6,028
New York	4,868,996	43,041	8,840
North Carolina	1,785,086	8,925	5,000
North Dakota	74,017	551	7,442
Ohio	2,061,713	12,062	5,850
Oklahoma	765,344	3,350	4,376
Oregon	487,361	2,460	5,047
Pennsylvania	2,134,331	12,501	5,857
Rhode Island	203,731	1,648	8,087
South Carolina	871,211	4,347	4,990
South Dakota	136,734	673	4,923
Tennessee	1,471,158	6,362	4,324
Texas	3,992,911	16,657	4,172
Utah ^b	242,650	1,395	5,748
Vermont	162,143	883	5,445
Virginia	839,475	4,661	5,552
Washington	1,187,798	5,834	4,912
West Virginia	377,631	2,402	6,360
Wisconsin	1,531,520	4,589	2,996
Wyoming	69,178	503	7,273

SOURCE: Medicaid Statistical Information System (MSIS) State Summary Data, Centers for Medicare & Medicaid Services.

a. Excludes recipients in Puerto Rico and the U.S. Virgin Islands. Data are not available.

b. Fiscal year 2008 data are not available for Hawaii and Utah. Fiscal year 2007 data have been substituted.

CONTACT: Loan Swisher (410) 786-4650 or supplement@ssa.gov.



Other Social Insurance Programs and Veterans' Benefits

Other Social Insurance Programs

Unemployment Insurance	9.1
Workers' Compensation	9.3
Temporary Disability Insurance	9.9
Black Lung Benefits	9.10

Veterans' Benefits **9.12**

Table 9.A2—Summary data on state programs, by state or other area, 2008

State or area	Covered employment (excludes federal government)		Insured unem- ployment as percent of covered employ- ment ^a	Number of first payments	Average weekly benefit for total unemployment		Average weekly insured unem- ployment	Average actual duration (weeks)	Claimants exhausting benefits		Contri- butions collected ^b (millions of dollars)	Benefits paid ^c (millions of dollars)	Average employer contri- bution rate ^d (percent)
	Average number of workers (thou- sands)	Total payroll ^e (millions of dollars)			Amount ^f (dollars)	Percent of average weekly wages ^g			Number	Percent of first pay- ments ^h			
Total	132,780	5,971,629	2.5	10,052,694	297.09	34.4	3,306,433	14.9	3,423,977	41.5	30,004	42,719	2.3
Alabama	1,884	71,424	2.0	147,870	196.23	26.9	37,385	11.2	35,443	32.2	216	312	1.4
Alaska	298	13,342	3.7	37,665	202.16	23.5	10,955	14.6	15,736	40.7	123	107	2.1
Arizona	2,529	106,458	1.9	136,526	217.72	26.9	47,672	14.9	50,630	49.0	268	449	1.4
Arkansas	1,151	39,622	3.0	104,782	264.86	40.0	34,320	13.0	32,714	37.0	250	334	2.4
California	15,251	781,979	3.3	1,389,228	307.12	31.1	503,043	16.6	573,674	50.1	4,490	6,987	4.1
Colorado	2,259	104,220	1.3	95,711	340.72	38.4	30,130	12.8	36,446	48.4	393	416	1.7
Connecticut	1,669	97,328	2.8	153,263	321.97	28.7	47,487	15.8	46,181	36.3	530	736	2.6
Delaware	415	19,775	2.5	29,520	256.89	28.1	10,433	17.1	9,680	38.0	78	132	2.0
District of Columbia	492	34,823	1.0	21,182	291.43	21.4	5,130	22.1	10,360	58.2	106	112	2.0
Florida	7,538	302,737	2.4	510,018	238.41	30.9	177,559	15.2	225,600	57.4	775	1,844	1.4
Georgia	3,933	165,454	2.1	310,660	272.78	33.7	84,015	11.6	109,407	45.6	490	944	1.5
Hawaii	587	23,207	2.0	39,333	413.07	54.4	11,699	13.9	9,069	31.2	61	220	0.7
Idaho	640	21,405	3.0	71,476	272.18	42.3	19,139	11.9	18,963	35.1	97	218	0.8
Illinois	5,754	278,956	2.8	445,417	312.09	33.5	160,296	16.7	148,766	40.0	1,853	2,310	3.0
Indiana	2,834	108,039	2.6	261,334	297.73	40.6	74,029	12.8	93,086	45.9	512	995	2.7
Iowa	1,472	54,070	2.0	126,309	302.14	42.8	29,261	11.6	26,425	26.7	358	418	1.6
Kansas	1,342	50,775	1.6	75,541	316.03	43.4	22,008	13.9	23,211	36.9	217	319	1.4
Kentucky	1,753	64,896	2.3	138,934	299.68	42.1	39,876	14.1	29,491	25.1	370	562	2.8
Louisiana	1,857	74,247	1.4	75,494	209.12	27.2	26,567	13.7	24,262	39.5	154	222	1.4
Maine	587	20,939	2.2	39,358	264.78	38.6	12,634	14.1	12,331	36.3	90	144	1.6
Maryland	2,410	115,085	2.1	139,541	304.93	33.2	49,847	15.1	44,399	38.6	348	644	1.7
Massachusetts	3,197	180,820	3.0	256,698	390.69	35.9	96,030	17.4	94,366	41.5	1,425	1,584	3.4
Michigan	4,018	176,900	4.1	513,255	299.58	35.4	164,022	15.0	177,270	39.0	1,495	2,235	4.7
Minnesota	2,645	120,678	2.2	163,871	346.93	39.5	59,388	16.3	58,585	41.7	787	885	1.6
Mississippi	1,104	36,346	2.3	76,960	182.74	28.9	25,285	12.9	19,831	33.6	99	182	1.3
Missouri	2,660	106,367	2.2	176,288	244.10	31.7	58,853	13.9	51,774	35.5	581	595	2.2
Montana	424	13,792	2.3	30,260	255.19	40.8	9,651	14.1	8,875	38.1	77	101	1.0
Nebraska	907	32,540	1.2	38,268	241.25	35.0	10,765	11.5	13,976	42.7	100	109	1.4
Nevada	1,236	52,777	3.2	128,702	292.32	35.6	39,936	14.6	45,601	46.9	343	579	1.3
New Hampshire	621	27,713	1.6	33,874	272.03	31.7	10,173	13.1	6,501	22.9	47	124	1.2
New Jersey	3,876	213,422	3.5	368,176	377.48	35.6	133,888	17.8	162,112	50.3	1,837	2,339	2.0
New Mexico	795	29,336	1.8	37,710	278.07	39.2	14,027	15.9	15,084	47.0	68	172	1.0
New York	8,481	510,986	2.5	578,770	306.54	26.5	209,550	16.2	192,473	39.3	2,121	2,735	3.4
North Carolina	3,980	156,935	2.7	353,511	287.32	37.9	108,348	13.2	132,019	50.4	868	1,070	1.8
North Dakota	341	11,772	1.1	15,397	286.21	43.1	3,676	10.3	4,561	37.9	48	49	1.0

(Continued)

9.A Unemployment Insurance

Table 9.A2—Summary data on state programs, by state or other area, 2008—Continued

State or area	Covered employment (excludes federal government)		Insured unem- ployment as percent of covered employ- ment ^a	Number of first payments	Average weekly benefit for total unemployment		Average weekly insured unem- ployment	Average actual duration (weeks)	Claimants exhausting benefits		Contri- butions collected ^b (millions of dollars)	Benefits paid ^c (millions of dollars)	Average employer contri- bution rate ^d (percent)
	Average number of workers (thou- sands)	Total payroll ^e (millions of dollars)			Amount ^f (dollars)	Percent of average weekly wages ^g			Number	Percent of first pay- ments ^h			
Ohio	5,159	208,586	2.5	357,192	302.69	38.9	127,314	14.9	97,460	32.7	1,045	1,493	2.6
Oklahoma	1,505	55,067	1.1	52,858	272.43	38.7	16,803	13.6	16,698	39.2	149	191	0.8
Oregon	1,686	67,595	3.7	198,479	301.69	39.1	61,904	13.9	55,343	35.8	747	822	1.7
Pennsylvania	5,554	244,536	3.5	562,343	335.40	39.6	194,274	16.1	166,335	34.8	2,031	2,753	4.7
Rhode Island	460	19,511	3.4	46,446	370.46	45.4	15,801	16.3	20,492	47.1	169	278	3.4
South Carolina	1,845	66,197	2.9	157,489	239.81	34.8	53,296	13.3	56,488	44.5	264	492	2.1
South Dakota	386	12,434	0.6	9,219	238.82	38.5	2,290	10.2	913	12.4	25	26	0.8
Tennessee	2,673	105,764	2.0	193,988	220.98	29.0	53,591	13.3	60,847	40.0	394	567	2.1
Texas	10,260	468,251	1.2	404,589	302.94	34.5	120,735	13.4	135,761	43.8	950	1,553	1.2
Utah	1,186	44,339	1.2	46,737	311.60	43.3	14,663	13.6	14,053	42.2	131	194	0.6
Vermont	296	11,221	2.7	27,605	293.62	40.3	7,945	14.4	5,254	22.1	58	112	2.9
Virginia	3,507	160,666	1.2	149,759	281.86	32.0	43,215	12.3	47,232	39.5	324	517	1.1
Washington	2,881	133,010	2.4	232,831	355.33	40.0	67,808	13.1	47,498	25.4	1,063	1,052	1.7
West Virginia	687	24,051	2.2	48,800	241.52	35.9	14,828	13.2	10,709	24.5	137	165	2.8
Wisconsin	2,743	106,843	3.2	321,164	273.11	36.5	87,695	13.2	77,371	27.8	626	1,035	2.6
Wyoming	279	11,459	0.9	10,226	307.52	38.9	2,470	13.2	3,003	29.1	54	52	1.3
Outlying areas													
Puerto Rico	986	24,646	4.5	109,613	112.28	23.4	43,981	18.4	48,438	47.4	164	222	3.2
U.S. Virgin Islands	45	1,629	1.7	2,454	328.43	47.0	741	16.7	1,180	56.6	1	13	0.2

SOURCES: Department of Labor, Employment and Training Administration and Bureau of Labor Statistics; based on data submitted by state agencies.

NOTES: Except where noted, excludes data for federal employees and for ex-servicemembers; includes data for state and local government employees where covered by state law after 1955.

Totals do not necessarily equal the sum of rounded components.

- Based on average covered employment in 12-month period.
- Contributions, penalties, and interest from employers and contributions from employees in states taxing workers; adjusted to exclude refunds of contributions and dishonored checks; excludes state and local government employees covered on reimbursable basis.
- Adjusted to exclude voided benefit checks and for transfers under interstate combined-wage plan; excludes Extended Benefits and Emergency Unemployment Compensation.
- Estimated data. Contribution rate as a percentage of taxable payroll; excludes state and local jurisdictions covering state and local government employees on a reimbursable basis. Standard contribution rate for most states, 2.7 percent.
- Total wages earned in covered employment during all pay periods ended within the year.
- Includes dependents' allowances for states that provide such benefits.
- Based on average total weekly wage in current year.
- Percentages based on first payments for 12-month period.

CONTACT: Scott Gibbons (202) 693-3008 or supplement@ssa.gov.

Table 9.B1—Coverage, benefits, and costs, selected years 1940–2008

Year	Estimated number of workers covered per month (millions)	Benefits paid during year (millions of dollars)						Cost of program as a percentage of covered payroll ^a	Benefits as a percentage of covered payroll ^b
		Total	Type of insurance			Type of benefits			
			Private carriers ^c	State and federal funds ^d	Employers' self-insurance ^b	Medical and hospitalization	Compensation payments		
1940	24.6	256	135	73	48	95	161	1.19	0.72
1946	32.7	434	270	96	68	140	294	0.91	0.54
1948	36.0	534	335	121	78	175	359	0.96	0.51
1949	35.3	566	353	132	81	185	381	0.98	0.55
1950	36.9	615	381	149	85	200	415	0.89	0.54
1951	38.7	709	444	170	94	233	476	0.90	0.54
1952	39.4	785	491	193	101	260	525	0.94	0.55
1953	40.7	841	524	210	107	280	561	0.97	0.55
1954	39.8	876	540	225	110	308	568	0.98	0.57
1955	41.4	916	563	238	115	325	591	0.91	0.55
1956	43.0	1,002	618	259	125	350	652	0.92	0.55
1957	43.3	1,062	661	271	130	360	702	0.91	0.56
1958	42.5	1,112	694	285	132	375	737	0.91	0.58
1959	44.0	1,210	753	316	141	410	800	0.89	0.58
1960	44.9	1,295	810	325	160	435	860	0.93	0.59
1961	45.0	1,374	851	347	176	460	914	0.95	0.61
1962	46.2	1,489	924	371	194	495	994	0.96	0.62
1963	47.3	1,582	988	388	207	525	1,057	0.99	0.62
1964	48.8	1,707	1,070	412	226	565	1,142	1.00	0.63
1965	50.8	1,814	1,124	445	244	600	1,214	1.00	0.61
1966	53.7	2,000	1,239	486	275	680	1,320	1.02	0.61
1967	55.0	2,189	1,363	524	303	750	1,439	1.07	0.63
1968	56.8	2,376	1,482	556	338	830	1,546	1.07	0.62
1969	59.0	2,634	1,641	607	386	920	1,714	1.08	0.62
1970	59.2	3,031	1,843	755	432	1,050	1,981	1.11	0.66
1971	59.4	3,563	2,005	1,098	460	1,130	2,433	1.11	0.67
1972	62.3	4,061	2,179	1,379	504	1,250	2,811	1.14	0.68
1973	66.3	5,103	2,514	1,998	592	1,480	3,623	1.17	0.70
1974	68.0	5,781	2,971	2,086	724	1,760	4,021	1.24	0.75
1975	67.2	6,598	3,422	2,324	852	2,030	4,568	1.32	0.83
1976	69.6	7,584	3,976	2,570	1,039	2,380	5,204	1.49	0.87
1977	72.1	8,630	4,629	2,750	1,250	2,680	5,950	1.71	0.92
1978	75.6	9,796	5,256	3,043	1,497	2,980	6,816	1.86	0.94
1979	78.6	12,027	6,157	4,022	1,848	3,520	8,507	1.95	1.01
1980	78.8	13,618	7,029	4,330	2,259	3,947	9,671	1.96	1.07
1981	78.3	15,054	7,876	4,595	2,583	4,431	10,623	1.85	1.08
1982	77.0	16,407	8,647	4,768	2,993	5,058	11,349	1.75	1.16
1983	78.0	17,575	9,265	5,061	3,249	5,681	11,894	1.67	1.17
1984	81.9	19,685	10,610	5,405	3,671	6,424	13,261	1.66	1.21
1985	84.3	22,217	12,341	5,744	4,132	7,498	14,719	1.82	1.30
1986	86.0	24,613	13,827	6,248	4,538	8,642	15,971	1.99	1.37
1987	88.4	27,318	15,453	6,782	5,082	9,912	17,406	2.07	1.43
1988	91.3	30,733	17,512	7,477	5,744	11,518	19,215	2.16	1.49
1989	93.7	34,316	19,918	7,965	6,433	13,424	20,892	2.04	1.46
1990	95.1	38,238	22,222	8,658	7,358	15,187	23,051	2.13	1.57
1991	93.6	42,169	24,515	9,711	7,944	16,832	25,337	2.16	1.65
1992	94.6	44,660	24,030	10,987	9,643	18,252	26,408	2.13	1.69
1993	96.1	42,925	21,773	11,294	9,857	17,521	25,403	2.17	1.62
1994	109.4	43,482	21,391	10,564	11,527	17,194	26,288	2.05	1.47
1995	112.8	42,122	20,106	10,784	11,232	16,733	25,389	1.83	1.35
1996	114.8	41,960	21,024	11,108	9,828	16,739	25,221	1.66	1.26
1997	118.1	41,971	21,676	9,937	10,357	17,397	24,574	1.49	1.17
1998	121.5	43,987	23,579	10,055	10,354	18,622	25,365	1.38	1.13
1999	124.3	46,313	26,383	9,945	9,985	20,055	26,258	1.35	1.12

(Continued)

9.B Workers' Compensation

Table 9.B1—Coverage, benefits, and costs, selected years 1940–2008—Continued

Year	Estimated number of workers covered per month (millions)	Benefits paid during year (millions of dollars)						Cost of program as a percentage of covered payroll ^a	Benefits as a percentage of covered payroll ^b
		Total	Type of insurance			Type of benefits			
			Private carriers ^c	State and federal funds ^d	Employers' self-insurance ^b	Medical and hospitalization	Compensation payments		
2000	127.1	47,699	26,874	10,345	10,481	20,933	26,766	1.34	1.06
2001	127.0	50,827	27,905	11,082	11,839	23,137	27,690	1.43	1.10
2002	125.6	52,297	28,085	12,293	11,920	24,203	28,094	1.57	1.13
2003	124.7	54,739	28,395	13,627	12,717	25,733	29,006	1.71	1.16
2004	125.9	56,149	28,632	14,402	13,115	26,079	30,070	1.70	1.13
2005	128.2	55,630	28,483	14,294	12,853	26,036	29,593	1.66	1.07
2006	130.3	54,274	27,733	13,898	12,643	25,962	28,312	1.56	0.98
2007	131.7	55,217	28,492	13,662	13,062	26,720	28,497	1.44	0.94
2008	130.6	57,633	30,150	13,905	13,578	29,063	28,570	1.33	0.97

SOURCES: National Academy of Social Insurance estimates based on data received from state agencies, the Department of Labor, A.M. Best Company, and the National Council on Compensation Insurance.

NOTES: Beginning in 1959, includes Alaska and Hawaii. States periodically update prior-year data, and any such changes are included in the current table.

Totals do not necessarily equal the sum of rounded components.

- Total costs to employers who purchase insurance from private carriers and state funds consist of premiums written in the calendar year plus the payments made under deductible provisions. For self-insured employers, the costs include benefit payments and administrative costs.
- Cash and medical benefits paid by self-insurers.
- Net cash and medical benefits paid during calendar year by private insurance companies under standard workers' compensation policies.
- Net cash and medical benefits paid by competitive and exclusive state funds and federal benefits, including those paid under the Federal Employees' Compensation Act for civilian employees; the portion of the Black Lung benefit program that is financed by employers; and a portion of benefits under the Longshore and Harbor Workers' Compensation Act that are not reflected in state data, namely, benefits paid by self-insured employers and by special funds under the LHWCA.

CONTACT: Ishita Sengupta (202) 452-8097 or supplement@ssa.gov.

Table 9.B2—Benefits, by state and federal program, 2004–2008 (in thousands of dollars)

Program	2004	2005	2006	2007	2008
Total, state and federal	56,148,671	55,629,676	54,274,033	55,216,750	57,632,944
<i>State programs</i>					
Subtotal	52,892,469	52,371,521	51,003,712	51,876,858	54,209,118
Alabama	532,000	565,013	562,632	584,941	648,094
Alaska	192,816	182,721	186,507	188,286	205,363
Arizona	547,872	542,781	608,258	647,417	648,664
Arkansas	219,177	192,860	196,782	205,890	215,404
California	12,446,670	10,832,367	9,914,209	9,509,403	9,426,019
Colorado	853,273	895,413	864,409	836,030	875,440
Connecticut	712,515	708,598	709,258	725,662	781,480
Delaware	157,399	185,639	208,308	196,501	208,562
District of Columbia	93,907	89,879	88,562	83,998	81,263
Florida	2,866,531	2,913,927	2,671,559	2,716,114	2,787,022
Georgia	1,259,155	1,379,383	1,369,685	1,482,217	1,601,644
Hawaii	271,290	250,779	242,685	247,294	245,763
Idaho	235,119	243,123	254,392	266,772	280,276
Illinois	2,254,415	2,425,483	2,439,925	2,736,641	2,994,420
Indiana	551,071	564,830	559,747	597,200	623,737
Iowa	449,718	489,009	488,534	496,054	575,072
Kansas	377,116	389,693	390,849	393,707	417,517
Kentucky	719,610	693,100	626,322	638,478	696,185
Louisiana	634,610	597,237	610,479	613,849	733,650
Maine	267,622	272,119	284,643	272,824	261,736
Maryland	797,301	784,312	828,821	843,967	935,948
Massachusetts	968,817	904,386	904,767	886,208	842,705
Michigan	1,517,386	1,473,598	1,470,574	1,507,968	1,404,976
Minnesota	934,613	941,636	937,355	951,848	1,007,193
Mississippi	310,516	311,910	337,849	328,969	361,015
Missouri	911,059	893,669	831,862	892,225	937,299
Montana	211,460	227,321	234,247	242,930	252,648
Nebraska	283,197	309,741	275,772	290,644	345,108
Nevada	358,732	386,333	393,555	378,400	392,663
New Hampshire	216,360	229,172	219,755	204,374	239,290
New Jersey	1,598,596	1,567,238	1,748,108	1,847,036	1,916,466
New Mexico	198,267	230,591	237,551	242,393	271,573
New York	3,101,314	3,154,126	3,251,427	3,137,467	3,536,944
North Carolina	1,168,848	1,386,576	1,317,308	1,348,692	1,526,320
North Dakota	83,237	82,033	81,297	95,418	105,837
Ohio	2,434,715	2,447,038	2,383,544	2,478,080	2,490,080
Oklahoma	627,174	640,088	674,677	702,295	782,091
Oregon	518,350	553,270	566,593	586,398	601,849
Pennsylvania	2,658,104	2,741,310	2,758,784	2,803,819	2,902,243
Rhode Island	143,423	137,202	149,395	152,235	158,006
South Carolina	855,062	917,191	989,189	884,513	915,014
South Dakota	77,409	85,889	108,550	119,351	113,555
Tennessee	815,838	822,618	881,156	775,361	827,757
Texas	1,624,217	1,548,506	1,384,652	1,414,780	1,514,130
Utah	241,193	253,763	257,962	282,600	301,116
Vermont	123,000	121,613	124,148	119,149	127,204
Virginia	738,475	854,165	807,404	1,069,374	1,148,354
Washington	1,837,215	1,847,523	1,927,431	1,995,744	2,192,885
West Virginia	878,255	818,146	481,668	634,279	603,073
Wisconsin	898,366	1,170,065	1,043,244	1,094,074	1,011,334
Wyoming	120,083	116,537	117,322	126,994	137,133

(Continued)

9.B Workers' Compensation

Table 9.B2—Benefits, by state and federal program, 2004–2008 (in thousands of dollars)—Continued

Program	2004	2005	2006	2007	2008
	<i>Federal programs^a</i>				
Subtotal	3,256,202	3,258,155	3,270,322	3,339,892	3,423,825
Civilian employee	2,445,077	2,462,059	2,454,861	2,586,700	2,676,370
Other	811,125	796,096	815,461	753,192	747,455

SOURCES: National Academy of Social Insurance estimates based on data received from state agencies, the Department of Labor, A.M. Best Company, and the National Council on Compensation Insurance.

NOTES: States periodically update prior-year data, and any such changes are included in the current table.

Totals do not necessarily equal the sum of rounded components.

- a. Federal benefits include those paid under the Federal Employees' Compensation Act for civilian employees; the portion of the Black Lung benefit program that is financed by employers; and a portion of benefits under the Longshore and Harbor Workers' Compensation Act that are not reflected in state data, namely, benefits paid by self-insured employers and special funds under the LHWCA.

CONTACT: Ishita Sengupta (202) 452-8097 or supplement@ssa.gov.

**Table 9.B3—Benefits paid by type of insurer and medical benefits paid, by state and federal program, 2008
(in thousands of dollars)**

Program	Benefits paid by type of insurer				Medical benefits paid	
	Total ^a	Private carriers ^b	State funds	Self-insurance ^c	Total	As a percentage of total benefits
Total, state and federal	57,632,944	30,149,529	10,481,628	13,577,961	29,063,181	50.4
State programs						
Subtotal	54,209,118	30,149,529	10,481,628	13,577,961	28,107,032	51.8
Alabama	648,094	305,029	...	343,065	445,889	68.8
Alaska	205,363	151,424	...	53,939	131,638	64.1
Arizona	648,664	175,152	358,955	114,558	441,740	68.1
Arkansas	215,404	163,223	...	52,181	140,228	65.1
California	9,426,019	4,690,810	1,836,083	2,899,126	5,134,209	54.5
Colorado	875,440	278,209	389,858	207,373	436,844	49.9
Connecticut	781,480	565,001	...	216,479	346,977	44.4
Delaware	208,562	157,278	...	51,284	125,137	60.0
District of Columbia	81,263	67,417	...	13,846	28,848	35.5
Florida	2,787,022	1,959,695	...	827,327	1,792,055	64.3
Georgia	1,601,644	1,125,712	...	475,931	775,196	48.4
Hawaii	245,763	131,389	28,589	85,784	106,170	43.2
Idaho	280,276	78,956	154,891	46,429	172,370	61.5
Illinois	2,994,420	2,162,134	...	832,286	1,449,299	48.4
Indiana	623,737	557,342	...	66,395	442,853	71.0
Iowa	575,072	441,506	...	133,567	311,114	54.1
Kansas	417,517	300,283	...	117,234	250,510	60.0
Kentucky	696,185	381,116	88,808	226,261	400,306	57.5
Louisiana	733,650	413,675	158,039	161,936	370,493	50.5
Maine	261,736	86,281	91,856	83,600	123,540	47.2
Maryland	935,948	507,854	228,218	199,876	420,241	44.9
Massachusetts	842,705	723,454	...	119,250	298,370	35.4
Michigan	1,404,976	851,600	...	553,377	508,649	36.2
Minnesota	1,007,193	697,018	55,568	254,607	536,280	53.2
Mississippi	361,015	223,753	...	137,262	214,082	59.3
Missouri	937,299	612,933	89,286	235,080	523,950	55.9
Montana	252,648	79,665	128,197	44,787	149,821	59.3
Nebraska	345,108	260,828	...	84,280	214,657	62.2
Nevada	392,663	282,880	...	109,783	181,803	46.3
New Hampshire	239,290	189,068	...	50,222	147,163	61.5
New Jersey	1,916,466	1,539,188	...	377,278	923,282	48.2
New Mexico	271,573	148,793	32,783	89,996	161,586	59.5
New York	3,536,944	1,683,293	1,032,617	821,034	1,803,841	51.0
North Carolina	1,526,320	1,065,094	...	461,226	696,002	45.6
North Dakota	105,837	57	105,780	...	61,936	58.5
Ohio	2,490,080	23,746	2,055,456	410,878	1,092,704	43.9
Oklahoma	782,091	323,987	280,056	178,048	342,556	43.8
Oregon	601,849	238,359	282,015	81,475	312,360	51.9
Pennsylvania	2,902,243	1,929,826	348,716	623,700	1,348,210	46.5
Rhode Island	158,006	47,150	90,060	20,795	50,720	32.1
South Carolina	915,014	669,375	55,853	189,785	375,156	41.0
South Dakota	113,555	109,563	...	3,992	76,082	67.0
Tennessee	827,757	631,401	...	196,355	437,883	52.9
Texas	1,514,130	874,047	338,783	301,299	926,647	61.2
Utah	301,116	100,142	144,733	56,241	215,599	71.6
Vermont	127,204	110,641	...	16,564	67,545	53.1
Virginia	1,148,354	839,691	...	308,663	666,046	58.0
Washington	2,192,885	21,340	1,665,190	506,355	798,723	36.4
West Virginia ^d	603,073	207,109	306,332	89,632	312,689	51.8
Wisconsin	1,011,334	963,812	...	47,521	745,931	73.8
Wyoming	137,133	2,227	134,906	...	71,102	51.8

(Continued)

9.B Workers' Compensation

**Table 9.B3—Benefits paid by type of insurer and medical benefits paid, by state and federal program, 2008
(in thousands of dollars)—Continued**

Program	Benefits paid by type of insurer				Medical benefits paid	
	Total ^a	Private carriers ^b	State funds	Self-insurance ^c	Total	As a percentage of total benefits
Federal programs ^e						
Subtotal	3,423,825	...	...	...	956,148	27.9
Civilian employee	2,676,370	...	...	...	798,039	29.8
Other	747,455	...	...	...	158,109	21.1

SOURCES: National Academy of Social Insurance estimates based on data received from state agencies, the Department of Labor, A.M. Best Company, and the National Council on Compensation Insurance.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

- a. These data may not include second injury fund for all states and may understate total payments.
- b. States with exclusive funds (North Dakota, Ohio, Washington, and Wyoming) may have small amounts of benefits paid by private carriers. This is because some employers doing business in states with exclusive funds may be required by Longshore and Harbor Workers' Compensation Act (LHWCA) provisions to obtain coverage from private carriers, or may obtain employer's liability coverage that the state fund is not authorized to provide. In addition, private carriers may provide excess compensation coverage in some of these states.
- c. Includes individual self-insurers and group self-insurance.
- d. In 2008, West Virginia completed the transition from an exclusive state fund to a competitive fund.
- e. Federal benefits include those paid under the Federal Employees' Compensation Act for civilian employees; the portion of the Black Lung benefit program that is financed by employers; and a portion of benefits under the LHWCA that are not reflected in state data, namely, benefits paid by self-insured employers and special funds under the LHWCA.

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Table 9.C1—Selected data on state and railroad programs, 2007

State and program ^a	Average annual covered employment (thousands)	Taxable payrolls (millions of dollars)	Average weekly number of beneficiaries (thousands)	Average weekly benefit (dollars)	Average duration per period (weeks)	Contributions collected (millions of dollars)	Net benefits paid (millions of dollars)	Administrative expenditures ^b (millions of dollars)
California ^c	13,329	528,600	--	--	--	--	4,376.7	232.5
State-operated fund	12,723	495,900	92.9	405.17	14.40	3,034.4	3,721.5	185.9
Private plans	606	32,700	--	637.92	12.64	232.3	208.1	46.6
Hawaii ^d (private plans)	403	9,864	--	381.71	3.67	60.4	56.0	--
New Jersey	^e 3,497	--	--	--	--	--	607.4	^f 35.2
State-operated fund	^e 2,871	^e 65,400	--	388.00	10.00	536.6	450.0	^f 33.0
Private plans	^e 626	--	--	--	--	--	157.4	^f 2.2
New York	7,278	^g 48,094	42.1	195.84	7.48	--	428.7	^h 8.0
Special state fund ⁱ	...	...	0.2	170.00	13.34	--	2.2	--
Private plans ^j	7,278	48,094	41.9	195.98	7.47	--	^k 426.7	--
Puerto Rico	--	--	--	--	--	--	--	--
State-operated fund	--	--	--	--	--	--	--	--
Private plans	--	--	--	--	--	--	--	--
Rhode Island (state-operated fund)	422	16,900	8.6	376.00	10.50	170.3	169.2	7.6
Railroad (publicly operated fund)	237	3,582	^l 4.8	^m 284.15	^m 13.00	ⁿ	^o 44.9	ⁿ

SOURCES: State agencies and Railroad Retirement Board.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable; -- = not available.

- a. Statutory programs providing short-term cash benefits to employees unable to work because of nonoccupational illness or injury.
- b. State cost of administering state program and of supervising private plans.
- c. Benefits and beneficiary data are for periods paid or terminated in 2007.
- d. Includes data not shown separately for special fund for workers whose disability begins during unemployment. In 2007, the fund paid \$57,723 in benefits.
- e. Estimated data.
- f. State fiscal year data (July 1–June 30).
- g. First \$7,000 of earnings of each employee, which was paid by the employer during the calendar year.
- h. State fiscal year data (April 1–March 31).
- i. For workers whose disability begins during unemployment.
- j. Includes State Insurance Fund of \$11.6 million.
- k. Indemnity benefits only.
- l. For 14-day registration period.
- m. For benefit year 2006–2007 (July 1, 2006–June 30, 2007).
- n. Single system of contributions and administrative operations for railroad unemployment insurance and temporary disability; collections amounted to \$89.6 million and administrative expenses to \$16.7 million for the system in 2007.
- o. Of this amount, \$41.3 million was for regular benefits and \$3.6 million for extended benefits.

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9.D Black Lung Benefits

Table 9.D1—Benefits currently payable to miners, widows, and dependents, December 1970–2009

Year	Number				Benefits (thousands of dollars)	
	Total	Miners	Widows	Dependents ^a	Monthly amount	Annual amount
1970	111,976	43,921	24,889	43,166	12,500	111,000
1971	231,729	77,213	67,358	87,158	27,200	378,900
1972	298,963	101,802	88,067	109,094	37,800	554,400
1973	461,491	159,837	124,154	177,500	63,700	1,045,200
1974	487,216	169,097	134,700	183,419	71,500	951,300
1975	482,311	165,405	139,407	177,499	75,500	947,700
1976	469,655	158,087	142,495	169,073	77,400	963,300
1977	457,399	148,720	144,543	164,136	80,500	942,200
1978	439,970	138,648	145,829	155,493	82,300	965,100
1979	418,948	129,558	146,527	142,863	86,500	983,100
1980	399,477	120,235	146,603	132,639	91,400	1,032,000
1981	376,505	111,249	146,173	119,083	91,700	1,081,300
1982	354,569	102,234	144,863	107,472	90,800	1,076,000
1983	333,358	93,694	142,967	96,697	86,300	1,055,800
1984	313,822	85,658	140,995	87,169	85,300	1,038,000
1985	294,846	77,836	138,328	78,682	83,700	1,025,000
1986	275,783	70,253	135,033	70,497	78,900	971,000
1987	258,988	63,573	131,561	63,854	76,800	940,000
1988	241,626	56,977	127,322	57,327	73,500	904,000
1989	225,764	51,048	123,220	51,496	72,000	882,000
1990	210,678	45,643	118,705	46,330	70,000	863,400
1991	196,419	40,703	114,046	41,670	68,400	844,400
1992	182,396	35,971	109,091	37,334	66,500	822,500
1993	168,365	31,664	103,334	33,367	64,100	794,300
1994	155,172	27,828	97,414	29,930	60,600	751,900
1995	143,011	24,573	91,517	26,921	56,100	696,700
1996	131,143	21,477	85,559	24,107	52,600	654,600
1997	119,233	18,488	79,238	21,507	49,255	614,888
1998	109,271	15,964	73,420	19,887	46,204	576,389
1999	98,977	13,635	67,359	17,983	43,225	541,200
2000	89,355	11,587	61,542	16,226	40,625	509,290
2001	79,518	9,779	55,412	14,327	37,324	470,362
2002	71,584	8,394	50,404	12,786	35,017	439,337
2003	64,237	7,142	45,746	11,349	32,198	411,635
2004	52,362	6,009	40,727	5,626	29,460	376,374
2005	46,609	4,972	37,099	4,538	26,399	340,187
2006	40,018	4,217	32,168	3,633	24,282	312,461
2007	36,231	3,447	28,231	4,553	21,699	282,380
2008	32,411	2,912	25,110	4,389	19,875	255,892
2009	28,558	2,416	21,931	4,211	17,975	232,002

SOURCE: Department of Labor, Beneficiary Master Table, 100 percent data.

a. Includes wives of living miners, divorced wives, children, and dependent brothers and sisters of miners.

CONTACT: Bennett Stewart (606) 218-9236 or supplement@ssa.gov.

Table 9.D2—Benefits currently payable to miners, widows, and dependents, by state or other area, December 2009

State or area	Number				Monthly amount (thousands of dollars)		
	Total	Miners	Widows	Dependents ^a	Total	Miners ^b	Widows ^c
All areas	28,558	2,416	21,931	4,211	17,975	1,877	16,098
Alabama	1,072	40	851	181	672	31	641
Alaska	^d	^d	^d	^d	^d	^d	^d
Arizona	95	7	82	6	60	5	55
Arkansas	149	6	131	12	92	4	88
California	160	8	133	19	98	5	93
Colorado	185	8	157	20	116	6	110
Connecticut	49	0	43	6	30	0	30
Delaware	42	^d	35	^d	26	^d	^d
District of Columbia	8	0	8	0	5	0	5
Florida	637	37	520	80	398	29	369
Georgia	159	5	131	23	97	3	94
Hawaii	^d	^d	^d	^d	^d	^d	^d
Idaho	^d	^d	^d	^d	^d	^d	^d
Illinois	811	37	667	107	507	30	477
Indiana	530	37	402	91	334	28	306
Iowa	92	6	76	10	58	5	54
Kansas	38	0	35	3	24	0	24
Kentucky	4,424	608	3,141	675	2,817	473	2,344
Louisiana	17	0	14	3	10	0	10
Maine	^d	^d	^d	^d	^d	^d	^d
Maryland	287	15	222	50	180	11	168
Massachusetts	18	^d	^d	^d	11	^d	^d
Michigan	305	11	240	54	189	8	181
Minnesota	11	^d	^d	^d	7	^d	^d
Mississippi	26	0	22	4	16	0	16
Missouri	96	3	82	11	59	2	57
Montana	33	^d	28	^d	21	^d	^d
Nebraska	^d	^d	^d	^d	^d	^d	^d
Nevada	23	^d	19	^d	14	^d	^d
New Hampshire	^d	^d	^d	^d	^d	^d	^d
New Jersey	201	7	169	25	124	5	119
New Mexico	58	^d	43	^d	36	^d	^d
New York	193	5	159	29	119	4	115
North Carolina	357	23	289	45	224	17	207
North Dakota	^d	^d	^d	^d	^d	^d	^d
Ohio	1,805	96	1,392	317	1,124	75	1,049
Oklahoma	100	6	85	9	63	5	58
Oregon	19	^d	12	^d	11	^d	^d
Pennsylvania	6,297	400	5,099	798	3,931	302	3,629
Rhode Island	^d	^d	^d	^d	^d	^d	^d
South Carolina	120	7	91	22	75	6	70
South Dakota	0	0	0	0	0	0	0
Tennessee	1,233	88	948	197	769	69	700
Texas	95	5	69	21	57	3	53
Utah	117	13	91	13	73	9	64
Vermont	5	0	5	0	3	0	3
Virginia	2,545	327	1,863	355	1,623	256	1,367
Washington	44	3	37	4	27	2	25
West Virginia	5,982	593	4,417	972	3,796	472	3,324
Wisconsin	15	^d	^d	^d	10	^d	^d
Wyoming	40	0	35	5	25	0	25
Outlying areas ^e	36	^d	28	^d	23	^d	^d

SOURCE: Department of Labor, Beneficiary Master Table, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

- Includes wives of living miners, divorced wives, children, and dependent brothers and sisters of miners.
- Includes benefits for wives and children.
- Includes benefits for surviving children, brothers, sisters, and divorced wives. Prior to December 1997, monthly payments for surviving children were included with payments to miners.
- Suppressed to avoid disclosing information about particular individuals.
- Includes beneficiaries residing in American Samoa, Guam, Northern Mariana Islands, Puerto Rico, U.S. Virgin Islands, and foreign countries.

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9.F Veterans' Benefits

Table 9.F1—Number of disability compensation or pension payments, by type of payment and age of beneficiary, selected years 1940–2009 (in thousands)

Year	Total ^a	Service-connected							Not service-connected		
		All ages	Under age 65			Aged 65 or older					
			Subtotal	Disability rating ^b		Subtotal	Disability rating ^b				
				Less than 70 percent	70–100 percent		Less than 70 percent	70–100 percent			
As of June 30											
1940	610	385	...	...	...	...	...	...	189	...	...
1945	1,144	912	...	...	...	...	...	...	159	...	...
1950	2,368	1,990	...	...	...	...	...	...	290	...	...
1955	2,669	2,076	...	...	...	...	...	...	531	...	...
1956	2,739	2,083	2,026	1,841	185	57	43	14	597	319	278
As of June 20											
1957	2,797	2,074	2,004	1,825	179	70	53	17	670	304	366
1958	2,850	2,064	1,980	1,807	173	84	65	19	741	279	462
1959	2,934	2,053	1,952	1,781	171	101	78	23	841	257	584
1960	3,009	2,027	1,908	1,746	162	119	93	26	947	219	728
1961	3,107	2,000	1,868	1,711	158	131	104	27	1,077	182	895
1962	3,150	1,987	1,849	1,693	156	138	109	29	1,138	166	972
1963	3,181	1,989	1,844	1,686	158	145	115	30	1,170	165	1,005
1964	3,197	1,993	1,846	1,684	162	147	117	30	1,186	176	1,010
1965	3,217	1,992	1,846	1,679	167	146	117	29	1,210	197	1,013
1966	3,201	1,993	1,850	1,677	173	143	115	28	1,196	221	975
1967	3,182	1,999	1,858	1,683	175	141	114	27	1,173	243	930
1968	3,164	2,011	1,873	1,696	177	138	112	26	1,145	265	880
1969	3,160	2,039	1,904	1,712	192	135	110	25	1,114	286	828
1970	3,181	2,091	1,950	1,754	196	141	116	25	1,086	310	776
1971	3,222	2,146	1,995	1,780	215	151	128	23	1,073	335	738
1972	3,269	2,183	2,022	1,804	218	161	135	26	1,086	381	705
1973	3,257	2,204	2,028	1,806	222	176	150	26	1,053	402	651
1974	3,241	2,211	2,018	1,796	222	193	165	28	1,030	410	620
1975	3,227	2,220	2,006	1,784	222	214	185	29	1,006	430	576
1976	3,236	2,232	1,996	1,767	229	236	209	27	1,003	456	547

(Continued)

Table 9.F1—Number of disability compensation or pension payments, by type of payment and age of beneficiary, selected years 1940–2009 (in thousands)—Continued

Year	Total ^a	Service-connected							Not service-connected		
		All ages	Under age 65			Aged 65 or older					
			Subtotal	Disability rating ^b		Subtotal	Disability rating ^b				
				Less than 70 percent	70–100 percent		Less than 70 percent	70–100 percent	All ages	Under age 65	Aged 65 or older
As of September 30											
1977	3,280	2,248	1,989	1,759	230	258	226	32	1,032	505	527
1978	3,284	2,259	1,971	1,741	230	288	254	34	1,025	516	509
1979	3,241	2,267	1,944	1,717	227	323	285	38	974	500	474
1980	3,196	2,274	1,912	1,689	223	362	320	42	922	467	455
1981	3,154	2,279	1,873	1,656	217	406	359	47	875	438	437
1982	3,096	2,274	1,818	1,606	210	456	404	52	824	406	418
1983	3,044	2,263	1,744	1,544	200	519	461	58	781	373	408
1984	2,980	2,251	1,666	1,476	190	585	520	65	729	339	390
1985	2,931	2,240	1,589	1,408	181	651	579	72	690	306	384
1986	2,883	2,225	1,505	1,335	169	720	641	79	658	274	384
1987	2,844	2,212	1,428	1,268	160	784	698	86	631	244	387
1988	2,804	2,199	1,361	1,209	153	838	746	92	606	219	387
1989	2,776	2,192	1,302	1,156	146	890	792	98	584	196	388
1990	2,746	2,184	1,253	1,113	140	931	828	102	562	175	387
1991	2,709	2,179	1,238	1,098	140	941	838	103	530	156	375
1992	2,674	2,181	1,245	1,104	141	936	833	103	493	138	354
1993	2,660	2,198	1,265	1,122	143	932	828	104	462	128	335
1994	2,659	2,218	1,290	1,144	146	928	824	104	441	122	319
1995	2,669	2,236	1,310	1,158	152	926	819	107	433	120	313
1996	2,671	2,253	1,330	1,171	158	923	814	109	418	116	302
1997	2,667	2,263	1,346	1,178	168	917	805	112	404	112	292
1998	2,668	2,277	1,372	1,191	180	905	790	115	391	110	281
1999	2,673	2,294	1,404	1,209	195	890	771	119	379	113	266
2000	2,672	2,308	1,435	1,224	211	874	751	123	364	115	249
2001	2,669	2,321	1,464	1,238	226	857	731	126	348	116	232
2002	2,745	2,398	1,546	1,288	258	852	716	136	347	125	222
2003	2,832	2,485	1,634	1,335	299	852	703	148	347	136	210
2004	2,899	2,556	1,708	1,373	335	848	690	158	343	146	197
2005	2,973	2,637	1,792	1,421	371	845	677	168	336	151	185
2006	3,056	2,726	1,875	1,474	401	851	674	177	330	154	176
2007	3,167	2,844	1,974	1,540	434	869	681	188	323	153	170
2008	3,270	2,952	2,069	1,596	472	883	684	199	318	152	166
2009	3,384	3,070	2,154	1,640	514	916	697	218	314	148	166

SOURCE: Department of Veterans Affairs, published and unpublished data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Persons receiving payments under special acts and as retired emergency and reserve officers are included in the total but not in the distribution.

b. Disability rated by the Department of Veterans Affairs according to average impairment of earning capacity, graduated in intervals from 10 percent to 100 percent.

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APPENDIXES



A. Sampling Variability	A.1
B. OASDI Benefit Award Data	B.1
C. Poverty Data	C.1
D. Computing a Retired-Worker Benefit	D.1

Appendix A: Sampling Variability

A small number of tables in sections 5 and 6 present Old-Age, Survivors, and Disability Insurance (OASDI) current-pay benefit and award data based on 1 percent and 10 percent sample files drawn from the Social Security Administration's administrative records. In addition, Tables 4.B1–4.B14 on the taxable earnings of OASDI workers are based on 1 percent administrative record samples.

Because of sampling variability, estimates based on sample data differ from the figures that would have been obtained had all, rather than specified samples, of the records been used. The standard error is a measure of the sampling variability. About 68 percent of all possible probability samples selected with the same specifications will give estimates within one standard error of the figure obtained from a compilation of all records. Similarly, approximately 90 percent will give estimates within 1.645 standard errors, about 95 percent will give estimates within two standard errors, and about 99 percent will give estimates within two and one-half standard errors. The standard error of an estimate depends on the design elements such as the method of sampling, sample size, and the estimation process.

Because of the large number of data cells tabulated from the sample files, it is not practical to calculate the standard error for every possible cell. However, standard errors for a large number of cells were estimated. These estimates were used to fit regression curves to provide estimates of approximate standard errors associated with tabulated counts and proportions.

The tables showing the sampling variability provide a general order of magnitude for similar estimates from the various sample files. Table A-1 presents approximate standard errors for the estimated number of persons from the 1 percent and the 10 percent files. The reliability of an estimated percentage depends on both the size of the percentage and on the size of the total on which the percentage is based. Data in Table A-2 provide approximations of the standard errors of the estimated percentage of persons in the 1 percent and 10 percent files. The standard errors are expressed in percentage points and the bases shown are in terms of inflated data.

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Table A-1.
Approximations of standard errors of estimated number of persons

Size of estimate (inflated)	Standard error
<i>1 percent file</i>	
500	250
1,000	300
2,500	500
5,000	800
7,500	900
10,000	1,100
25,000	1,700
50,000	2,400
75,000	3,000
100,000	3,400
250,000	5,400
500,000	7,800
750,000	9,600
1,000,000	11,100
5,000,000	25,800
10,000,000	36,900
25,000,000	57,700
50,000,000	76,100
75,000,000	82,900
<i>10 percent file</i>	
100	30
500	70
1,000	100
5,000	225
10,000	300
50,000	700
100,000	1,000
500,000	2,200
1,000,000	3,200
2,000,000	4,300
3,000,000	5,300
5,000,000	6,500
10,000,000	8,500
20,000,000	9,300

Table A-2.
Approximations of standard errors of estimated
percentage of persons

Size of base (inflated)	2 or 98	5 or 95	10 or 90	25 or 75	50
<i>1 percent file</i>					
1,000	4.7	7.3	10.1	14.5	16.8
10,000	1.5	2.3	3.2	4.6	5.3
50,000	0.7	1.0	1.4	2.1	2.4
100,000	0.5	0.7	1.0	1.5	1.7
500,000	0.2	0.3	0.4	0.7	0.8
1,000,000	0.1	0.2	0.3	0.5	0.5
5,000,000	0.1	0.1	0.1	0.2	0.2
10,000,000	a	0.1	0.1	0.2	0.2
50,000,000	a	a	a	0.1	0.1
100,000,000	a	a	a	a	a
<i>10 percent file</i>					
500	1.9	3.0	4.1	5.9	6.8
1,000	1.3	2.1	2.9	4.1	4.8
2,500	0.8	1.3	1.8	2.6	3.0
10,000	0.4	0.6	0.9	1.3	1.5
50,000	0.2	0.3	0.4	0.6	0.7
100,000	0.1	0.2	0.3	0.4	0.5
500,000	a	0.1	0.1	0.2	0.2
1,000,000	a	0.1	0.1	0.1	0.2
5,000,000	a	a	a	a	0.1
10,000,000	a	a	a	a	a
50,000,000	a	a	a	a	a

a. Less than 0.05 percent.

Appendix B: OASDI Benefit Award Data

Old-Age, Survivors, and Disability Insurance (OASDI) benefit award data in the *Annual Statistical Supplement* are derived mainly from two sources:

- **100 percent award data:** The Master Beneficiary Record (MBR) is the major administrative database for the Social Security program. It is used for the calculation of benefits and the maintenance of information about beneficiaries. Each month, when the MBR is updated, a record of award actions is created. This record is used to prepare award data on a 100 percent basis. Data available each month include types of benefits awarded, sex of beneficiary, and the monthly benefit amounts payable. These data are used to update the time-series tables.
- **Award data from the OASDI 1 percent sample:** This source provides monthly award data based on a 1 percent sample derived from the MBR. The 12 monthly files are combined to produce an annual file. The 1 percent sample is used to prepare award tables, which show detailed data by age, sex, and type of benefit, and distributions by benefit amount. Award data from the 1 percent sample are similar to the data described above. An important difference, however, is the treatment of dual entitlement.

When a retired-worker beneficiary subsequently becomes dually entitled to a secondary benefit as a wife, husband, or widow or widower, the secondary benefit is counted as an award in the 100 percent data. In contrast, award data that are based on the OASDI 1 percent sample do not count the secondary benefit as an award when both benefits are paid from the same trust fund.

When dual entitlements are counted as awards, the number of awardees is increased and the monthly amount awarded is lowered. The person has already been counted as having received an award when he or she became entitled to the retired-worker benefit and is counted again upon entitlement to the secondary benefit. The average benefit amount is lowered because the amount recorded for the award for the dually entitled person is only the difference between the amount of the retired-worker benefit and the amount of the secondary benefit.

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Appendix C: Poverty Data

Table 3.E1 presents weighted average poverty thresholds for families in the United States for 1959–2009. Table 3.E2 presents year-end data on the number and percentage of people in poverty in the United States for selected years 1959–2008. Tables 3.E3 and 3.E6 present more detailed data on people and families in poverty in the United States during 2008; Table 3.E4 presents similar data by current living arrangement. (Both poverty thresholds and poverty population data are issued by the Census Bureau.) Table 3.E8 presents poverty guidelines by family size for the contiguous United States, Alaska, and Hawaii for 1965–2010. (Poverty guidelines are issued by the Department of Health and Human Services.)

Poverty thresholds are used primarily for statistical purposes—to produce statistics on the number of Americans in poverty. Poverty guidelines are used for administrative purposes—for example, to determine whether a person or family is financially eligible for assistance or services under certain federal government programs (not including cash public assistance). Both the thresholds and the guidelines are sets of dollar figures that vary by family size and (in the case of the thresholds) family composition.

The poverty thresholds were developed in 1963 and 1964 by Mollie Orshansky of the Social Security Administration as a measure of income inadequacy. The poverty definition was modified in 1969 and in 1981 by federal interagency committees. The thresholds were based on ratios of food expenditure to money income (from the Department of Agriculture’s 1955 Household Food Consumption Survey) and the costs of the Department of Agriculture’s economy food plan for families of different sizes and compositions (see Carmen DeNavas-Walt, Bernadette D. Proctor, and Jessica C. Smith, “Income, Poverty, and Health Insurance Coverage in the United States: 2008,” Census Bureau, *Current Population Reports*, P60-236 [2009] Appendix B; and Joseph Dalaker and Bernadette D. Proctor, “Poverty in the United States: 1999,” Census Bureau, *Current Population Reports*, P60-210 [2000], Appendix A). Although the poverty thresholds in some sense represent families’ needs, the official poverty measure should be interpreted as a statistical yardstick rather than as a complete description of what people and families need to live.

The poverty thresholds have become the basis for the official statistics on the extent of poverty in the United States, which are issued annually by the Census Bureau in the *Current Population Reports* series. The thresholds are adjusted annually for price changes using the annual average Consumer Price Index for All Urban Consumers

(CPI-U). (See Bureau of the Census, “Revision in Poverty Statistics, 1959 to 1968,” *Current Population Reports*, Special Studies, P-23, No. 28 [1969]; and Department of Commerce, Office of Federal Statistical Policy and Standards, “Directive No. 14: Definition of Poverty for Statistical Purposes,” *Statistical Policy Handbook* [1978].) The thresholds are the same for all 50 states and the District of Columbia.

The poverty guidelines are a simplified version of the poverty thresholds. There are separate sets of guidelines for the two noncontiguous states (Hawaii and Alaska). The guidelines are used for determining whether a person or family is financially eligible for assistance or services under certain federal programs. Authorizing legislation or regulations for specific programs indicate whether a program uses the poverty guidelines as one of several eligibility criteria, uses a modification of the guidelines (for example, 125 percent or 185 percent of the guidelines), or uses them for the purpose of setting priorities in providing assistance or services.

Since 1973, the guidelines have been computed from the poverty thresholds by increasing the most recently published weighted average poverty thresholds by the percentage change in the CPI-U over the past year (more precisely, from the next most recent calendar year to the most recent calendar year) and rounding the figure for a family of four up to the next highest multiple of \$50. Figures for all family sizes over and under four persons are computed by adding or subtracting equal dollar amounts derived from the average difference between poverty lines for different family sizes (rounded to the nearest multiple of \$20).

As noted above, the poverty thresholds were developed in 1963 and 1964 by Mollie Orshansky of the Social Security Administration. In May 1965—just over a year after the Johnson administration had initiated the War on Poverty—the Office of Economic Opportunity adopted Orshansky’s thresholds as a working or quasi-official definition of poverty. At that time, the thresholds comprised a matrix of 124 detailed poverty thresholds based on the total number of family members, the number of family members who were related children under age 18, the sex of the family householder, the age of the individual or family householder (for one- and two-person units only), and whether the family lived on a farm.

Orshansky calculated the poverty thresholds using data (from the 1955 Household Food Consumption Survey) that defined income as after-tax money income. However, when the thresholds were used to calculate poverty population figures, they were applied to family

income microdata (from the Census Bureau's Current Population Survey) that defined income as before-tax money income, because no other good source of family income microdata was available in the 1960s that used after-tax income as a definition of income.

In 1969, a federal interagency committee made two changes in the poverty definition: the thresholds would be annually updated by the CPI-U instead of by the per capita cost of the economy food plan, and farm poverty thresholds would be set at 85 percent rather than 70 percent of corresponding nonfarm thresholds. (Poverty threshold and poverty population figures for prior years were retabulated retrospectively on this basis.) In August 1969, the Bureau of the Budget designated the poverty thresholds with these revisions as the federal government's official statistical definition of poverty.

In 1981, several other changes recommended by another interagency committee were made in the poverty definition: (1) elimination of separate thresholds for farm families, (2) elimination (through appropriate averaging) of separate thresholds for female-householder and "all other" families, and (3) extension of the poverty matrix to make the largest family size category "nine persons or more" rather than "seven or more persons." (See Bureau of the Census, "Characteristics of the Population Below the Poverty Level: 1980," *Current Population Reports*, P-60, No. 133 [1982], pp. 2–5, 9, and 186.) As a result of these changes, the current matrix of poverty thresholds used by the Census Bureau to determine the poverty status of families and unrelated individuals consists of a set of 48 detailed thresholds arranged in a two-dimensional matrix by family size (number of family members, ranging from one person, that is, an unrelated individual, to nine or more persons) cross-classified by the presence and number of family members who are related children under age 18 (from no children to eight or more children present). Unrelated individuals and two-person families are further differentiated by the age of the individual or family householder (under age 65 and aged 65 or older).

The current official definition of poverty is 40 years old. In 1990, Congress requested a study of the official U.S. poverty measure by the National Research Council (NRC) to provide a basis for a possible revision of the poverty measure. In 1992, the NRC's Committee on National Statistics appointed a Panel on Poverty and Family Assistance to conduct this study. In 1995, the panel published its report of the study, *Measuring Poverty: A New Approach*, Constance F. Citro and Robert T. Michael, eds. (Washington, DC: National Academy Press, 1995). In the report, the panel proposed a new approach for developing an official poverty measure for the United States—although it did not propose a specific set of dollar figures. The panel's proposed approach focused on three major areas: new poverty thresholds, a

new and consistent definition of family resources (income), and data sources.

In July 1999, the Census Bureau, in collaboration with the Bureau of Labor Statistics, released a report, "Experimental Poverty Measures: 1990 to 1997," *Current Population Reports*, P60-205 (1999), that examined the effects of different resource definitions and thresholds on poverty and estimated several experimental poverty rates based on the NRC panel's recommendations. That report and subsequent updates are available on the Census Bureau's poverty measurement Web site at <http://www.census.gov/hhes/www/povmeas/nas.html>.

Data on the poverty population and on family and personal income are collected in the Current Population Survey Annual Social and Economic Supplement (CPS ASEC), formerly known as the March Supplement. Following the standard Census Bureau definition, *family* is defined as two or more persons related by birth, marriage, or adoption and residing together. *Income* refers to money income before federal, state, or local personal income taxes and excludes capital gains and lump-sum payments; however, public income transfers are included. Money income does not reflect that many families receive noncash benefits, such as employee use of business transportation and facilities, employer-paid health insurance and other employer-supported fringe benefits, Medicare, Medicaid, food stamps, and housing assistance. Many farm families receive benefits in the form of rent-free housing or goods produced and consumed by the family.

Every year between February and April, the sample of U.S. households interviewed in the monthly CPS is asked to provide information on household members' incomes during the preceding calendar year. Survey experience indicates that respondents tend to underreport their income in household surveys. Underreporting is most pronounced for dividends, interest, and workers' compensation; less pronounced for veterans' payments, public assistance, and private pensions; and modest for Social Security and other federal retirement programs. The proportion of nonresponses to CPS income questions is greater among middle income and higher income families than among lower income families.

Because the CPS sample size, content, and procedures have changed several times, some differences in the data over time may in part reflect these methodological changes, not just changes in the population. Important changes to the CPS methodology took place for data years 1976, 1979, 1980, 1987, 1988, 1992, 1994, 1995, and 2000. The table below presents a summary of the methodological changes and provides references for more information concerning these changes. The report

numbers, "P60-#", refer to the *Current Population Reports*, Consumer Income series.

For details about how questionnaire changes and file processing changes affected the data, see Edward J. Welniak Jr., "Effects of the March Current Population Survey's New Processing System on Estimates of Income and Poverty," paper presented at the annual meeting of the American Statistical Association (1990).

Further details about CPS methodology may be found in Technical Paper 63RV, available at <http://www.bls.census.gov/cps/tp/tp63.htm>.

For additional poverty data, browse the Census Bureau poverty Web site at <http://www.census.gov/hhes/www/poverty/poverty.html>, contact the Census Bureau's Data Integration Division information staff at (301) 763-3242, or visit the Census Bureau's Question & Answer Center at <http://ask.census.gov>.

For further information about technical changes to the poverty measure, contact Bernadette Proctor at (301) 763-3213 or e-mail bernadette.d.proctor@census.gov.

For further information about the statistical reliability of the CPS estimates, contact dsmd_s&a@census.gov.

Year	Methodological change	Reference
1959	First year for which poverty data are available. The poverty measure was developed in 1963 and 1964.	P60-210, Appendixes
1969	Modification of poverty measure. Bureau of the Budget prescribed the new measure as the official poverty measure for statistical use in federal agencies.	P60-68, pp. 11–12
1979	"Householder" concept first implemented, replacing "head" concept—the husband is no longer automatically the family reference person. Secondary families (people who are related to each other but not the householder) are tallied separately from "families." Change in universe—income questions no longer asked of 14-year-olds. Poverty universe changed—people under age 15 not living with any family members are excluded. (Previously, unrelated individuals under age 14 were excluded.)	P60-130, pp. 6–10
1980	Modification of poverty measure (final approval in 1981). Estimates weighted using 1980 Census results.	P60-133, pp. 2–7
1987	New CPS processing system.	P60-166, pp. 1, 14–17; Welniak, 1990 ASA proceedings
1992	Estimates first weighted using 1990 Census results.	P60-188, p. vii
1994	Computer-assisted interviewing replaced pencil-and-paper interviewing.	P60-189, p. vii
1994–1995	New CPS sample design.	P60-189, p. vii and Table D-3; P60-194, pp. v and xiii and Table D-3
1995	Revised edit and allocation procedures for race groups.	P60-194, pp. v and xiii
2000	Expansion of CPS sample interviewed from about 50,000 households to about 78,000 households nationwide. Poverty data for 2000 and 2001 from sample expansion first published in P60-219, "Poverty in the United States: 2001." In the same report, data were weighted using Census 2000 results.	P60-219, Appendix B
2002	For the first time, the CPS ASEC of 2003 recorded multiple categories for respondents who identified themselves with more than one race. We do not know how people who reported more than one race in 2002 previously reported their race. Therefore, there is no single way to compare changes to poverty by race between 2001 and 2002. The "Asian or Pacific Islander" race category was divided into two groups: "Asians" and "Native Hawaiians and Other Pacific Islanders."	P60-222, pp. 2–3, 5

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Appendix D: Computing a Retired-Worker Benefit

Overview

This section provides instructions and a worksheet for computing a retired-worker benefit for persons born in the years 1935 through 1948. The worksheet assumes that the worker had no prior period of entitlement to disability benefits and did not work after becoming entitled to retired-worker benefits.

The worksheet describes the various steps used in computing a benefit. The steps are based on the following Social Security program goals:

- *To provide a benefit based on lifetime earnings.* Benefits are related to the 35 highest earnings years (the number of computation years), but only for years after 1950. If there are fewer than 35 years with earnings, then years of no earnings are included among the 35 computation years.
- *To index lifetime earnings.* Earnings used in the computation are not the actual covered earnings but an amount that reflects earnings increases in average wage levels for each year after the earnings were paid. This procedure is termed *wage indexing*. Currently, earnings are generally indexed to wage levels in the year the worker turns age 60. For example, for a person attaining age 62 in 2010, actual earnings in 1985 of \$20,000 are indexed to \$49,142.45, on the basis of 2008 wage levels. Earnings after age 60 are included at their actual (nominal) value.
- *To replace a portion of the indexed earnings.* Indexed earnings are averaged over the number of computation years to calculate the average indexed monthly earnings (AIME). A benefit formula is applied to the AIME to produce the *primary insurance amount* (PIA), the amount payable to a worker who retires at the full retirement age (FRA). The benefit formula is weighted to provide a higher replacement of earnings for lower-wage workers. The formula for persons aged 62 in 2010 is 90 percent of the first \$761 of AIME; plus 32 percent of the next \$3,825; plus 15 percent of the AIME over \$4,586.
- *To permit early retirement.* Persons can retire as early as age 62, but the monthly benefit is reduced. The reduction is 5/9 of 1 percent for each of the first 36 months of entitlement immediately preceding the age at which 100 percent of PIA is payable (age 66 in 2010 but scheduled to increase to age 67 by 2022), plus 5/12 of 1 percent for each of up to 24 earlier months. For a person aged 62 in 2010, the maximum reduction is 25 percent if the individual is entitled to benefits for all 48 months between ages 62 and 66.

- *To provide for price indexing after age 62.* Benefits are adjusted annually in December to reflect increases in the Consumer Price Index (CPI-W). The benefit increase in 2009 was 0.0 percent. These cost-of-living adjustments are applied to the benefit for each year after the person attained age 62—even if the person was not actually receiving benefits.
- *To give credit for earnings after age 61.* Earnings after age 61 (which are not indexed) can be substituted for earnings in earlier years if they result in a higher benefit.
- *To give credit for late retirement.* Persons who do not receive benefits between the FRA and age 69 may receive increased benefits as a result of the delayed retirement credit provision. The benefit is increased by a specified percentage for each month a benefit was deferred. See Table 2.A20 for percentage increases.

Clarifying the Worksheet Procedure

Step 1 - Determining the Number of Computation Years

For workers born in the years 1935 through 1948, the number of computation years is 35.

Step 2 - Wage Indexing of Earnings

The following description and examples are provided for persons who wish to compute the index factors and indexed earnings. The indexing year is the year a person attains age 60. Beneficiaries born on January 1 are deemed to have attained age 60 on December 31 of the prior year.

The average wage for the indexing year is divided by the average wage in each prior year to obtain the factor for each prior year. For example, for a person attaining age 62 in 2010, the indexing year is 2008. The average annual wage for 2008 was \$41,334.97. The average annual wage for 1990 was \$21,027.98. The amount \$41,334.97 divided by \$21,027.98 yields a factor of 1.9657128.

The worker's actual earnings covered under Social Security in that year, up to the maximum earnings creditable, are multiplied by the indexing factor to obtain the indexed earnings (see Worksheet 1). For example, actual covered earnings of \$10,000 in 1990, multiplied by 1.9657128, result in indexed earnings of \$19,657.13; actual earnings of \$51,300 (the maximum creditable) result in indexed earnings of \$100,841.07.

Step 3 - Computing the Average Indexed Monthly Earnings (AIME)

After the earnings in each year have been indexed, they are used in computing average indexed monthly earnings. The years of highest indexed earnings corresponding to

the number of computation years are selected and totaled. This total is then divided by the number of months in the computation years. The result, rounded to the nearest lower dollar, is the average indexed monthly earnings.

For example, for a person attaining age 62 in 2010, the highest 35 years of indexed earnings are used. If the sum of these earnings equals \$400,000, the AIME is \$952 (\$400,000 divided by 420 months = \$952.38, rounded to \$952).

Step 4 - Computing the Primary Insurance Amount (PIA)

The PIA, the amount from which all Social Security benefits payable on a worker's earnings record are based, is computed by applying a formula to the AIME. The formula consists of brackets in which three percentages are applied to amounts of AIME. The dollar amounts defining the brackets are called *bend points*, and the bend points are different for each calendar year of attainment of age 62. The PIA is rounded to the nearest lower 10 cents.

For retired workers who attained age 62 in 2010, the bend points are \$761 and \$4,586. Thus the formula is 90 percent of the first \$761 of AIME; plus 32 percent of the next \$3,825 of AIME; plus 15 percent of AIME above \$4,586. The following are examples of PIA computations for such workers with different AIME amounts.

Example 1 - AIME of \$700

PIA is \$630

Based on: 90 percent of \$700

Example 2 - AIME of \$1,500

PIA is \$921.38 rounded to \$921.30

Based on: 90 percent of \$761 (\$684.90); plus
32 percent of \$739 (\$236.48)

Example 3 - AIME of \$5,000

PIA is \$1,971.00

Based on: 90 percent of \$761 (\$684.90); plus
32 percent of \$3,825 (\$1,224.00); plus
15 percent of \$414 (\$62.10)

The above calculations are applicable to workers who attain age 62 in 2010. For workers who attained age 62 in prior years, the bend points will be different, and the PIA must be increased to reflect cost-of-living adjustments between the year of attainment of age 62 and 2010. Worksheet 2 shows cost-of-living increase factors for 1979 through 2009. After the PIA is calculated for the year of attainment of age 62, cost-of-living increases are applied for each year through 2009. The result is the current 2010 PIA.

For example, a worker who attained age 62 in 2007 would receive cost-of-living adjustments for the years 2007–2009. The adjustments are cumulative, with each step rounded to the next lower dime. If the PIA at age 62 was \$700, the cost-of-living adjustments would be:

2007: \$700 multiplied by 1.023 = \$716.10

2008: \$716.10 multiplied by 1.058 = \$757.60

2009: \$757.60 multiplied by 1.000 = \$757.60

\$757.60 would be the PIA effective December 2009.

Step 5 - Computation of the Monthly Benefit

The full PIA is payable to a worker who retires at the full retirement age (FRA). In 2000, incremental increases in the FRA—from age 65 for workers born 1937 and earlier to age 67 for workers born 1960 and later—began to be phased in.

Early retirement reduces benefits:

Workers can still retire as early as age 62, but the monthly benefit is reduced by 5/9 of 1 percent for each of the first 36 months of entitlement immediately preceding the FRA. If the number of months preceding FRA exceeds 36, then the benefit is further reduced 5/12 of 1 percent for each of up to 24 earlier months. Workers attaining age 62 in 2010 have their benefits computed based on the FRA of 66. See Table 2.A17.1 to determine the FRA based on the year of birth as well as the reduction factors. For individuals electing benefits at exactly age 62 in 2010, the maximum reduction is 25 percent.

For example, in 2010 a worker with a PIA of \$700 would receive \$525 at age 62. The PIA is reduced by \$175.00, reflecting a reduction rate of 5/9 of 1 percent for each of the first 36 months and a reduction rate of 5/12 of 1 percent for each of the additional 12 months for a total reduction of 25 percent. After reduction of the PIA by \$175.00, the benefit amount is rounded down to the nearest lower dollar.

Delayed retirement increases benefits:

Delayed retirement increases the benefit amount (by a certain percentage depending on a person's date of birth) if the worker delays retirement beyond FRA. Benefit increases stop accumulating when the worker reaches age 70, even if he or she continues to delay taking benefits. Delayed retirement increases begin to apply to benefits in January of the year following the year the worker reaches FRA. The credit given for delayed retirement will gradually reach 8 percent per year (16/24 of 1 percent monthly) for those born 1943 and later. See Table 2.A20 for percentage increases.

For example, a worker born June 1944 will reach FRA in June 2010. If the worker delays receiving benefits until November 2010 (5 months after FRA), his or her benefit will be 103.33% of the PIA. If the worker's PIA is \$700, his or her benefit would increase to \$723.31 rounded to \$723.30.

Instructions for computing a retired-worker benefit (only for workers attaining age 62 in years 1997–2010)

STEP 1.—Determining the Number of Computation Years		
1	Number of Computation Years.	35
STEP 2.—Indexing of Earnings (Use Worksheet 1 for Steps 2 and 3.)		
2	Enter in column 2 your earnings in each year 1951 through 2009. If none, enter “0.”	
3	Column 3 contains the maximum earnings creditable under Social Security for each year.	
4	Enter in column 4 the lower amount from columns 2 or 3 for each year.	
5	Enter in column 5 the indexing factors applicable to the year you attained age 62 from Table 2.A8. (This table contains the indexing factors for persons attaining age 62 during the period 1995–2010.)	
6	Multiply column 4 by column 5 and enter results in column 6 in dollars and cents. These are your indexed earnings.	
STEP 3.—Computing the Average Indexed Monthly Earnings (AIME)		
7	Enter the number of computation years from line 1.	35
8	Place an “X” in column 7 next to each of the 35 highest indexed earnings entries.	
9	Add all individual indexed earnings marked with an “X.”	
10	Number of months in the computation period.	420
11	Divide line 9 by line 10.	
12	Round the result in line 11 to the next lower dollar. This is your average indexed monthly earnings (AIME).	
STEP 4.—Computing the Primary Insurance Amount (PIA) (Use Worksheet 2 for Step 4.)		
13	Enter first bend point from Worksheet 2 based on year of attainment of age 62. (If your birthday is January 1, enter prior year.)	
14	Enter second bend point from Worksheet 2.	
15	If your AIME (obtained in line 12) is equal to or less than line 13, complete line 16, otherwise skip to line 17.	
16	Multiply line 12 by 0.9. (If you receive a pension on the basis of noncovered employment, see Table 2.A11.1.) Round to next lower dime to obtain your PIA at age 62. Continue with line 26.	
17	If your AIME (obtained in line 12) is greater than line 13 but less than or equal to line 14, complete lines 18–20, otherwise skip to line 21.	
18	Multiply line 13 by 0.9. (If you receive a pension on the basis of noncovered employment, see Table 2.A11.1.)	
19	Subtract line 13 from line 12 then multiply by 0.32.	
20	Add line 18 to line 19, and round to next lower dime to obtain your PIA at age 62. Continue with line 26.	
21	If your AIME (obtained in line 12) is greater than line 14, complete lines 22–25.	
22	Multiply line 13 by 0.9. (If you receive a pension on the basis of noncovered employment, see Table 2.A11.1.)	
23	Subtract line 13 from line 14 then multiply by 0.32.	
24	Subtract line 14 from line 12 then multiply by 0.15.	
25	Add lines 22, 23, and 24, and round to the next lower dime to obtain your PIA at age 62. Continue with line 26.	
26	If you attained age 62 in 2010, skip to line 32. Otherwise you will need to adjust your PIA to reflect cost-of-living adjustments (COLAs) from the year you attained age 62 through 2009 by using lines 27–31 and Worksheet 2.	
27	Enter year of attainment of age 62.	
28	Place an “X” corresponding to the year you attained age 62 in column 5 (Worksheet 2).	
29	Place an “X” in column 5 (Worksheet 2) next to each subsequent year through 2009.	
30	Enter your PIA at age 62 from either line 16, 20, or 25—here and in the first row of column 6 (Worksheet 2).	
31	Beginning with first year marked, multiply your PIA at age 62 by the corresponding factor (column 4), round to the next lower dime, and enter in column 6. The resulting PIA is then multiplied by the next factor and is again rounded to the next lower dime. Continue this process through 2009. Enter this last figure, which is your current PIA.	

(Continued)

Instructions for computing a retired-worker benefit (only for workers attaining age 62 in years 1997–2010)—Continued

STEP 5.—Computing the Monthly Benefit		
32	Enter your current PIA from either line 16, 20, 25, or 31.	
33	Using Table 2.A17.1, determine your full retirement age and enter here.	
34	If you retired at your full retirement age, round PIA from line 32 to the next lower dollar to obtain your monthly benefit. If you retired before the full retirement age, skip to line 35. If you retired after the full retirement age, skip to line 45.	
35	If you retired before the full retirement age, enter your age at retirement in years and months, and complete lines 36–44.	
36	Subtract line 35 from line 33, and convert the result to months to determine the total number of reduction months.	
37	If line 36 is greater than 36 reduction months, subtract 36 months and enter the result here.	
38	“0.0055556” (the decimal equivalent of 5/9 of 1 percent—the monthly reduction factor for the first 36 months) has been entered.	0.0055556
39	“0.0041667” (the decimal equivalent of 5/12 of 1 percent—the monthly reduction factor for months above 36) has been entered.	0.0041667
40	Multiply line 36 (but not more than 36 months) by line 38 to obtain the percent reduction for the first 36 months.	
41	Multiply line 37 by line 39 to obtain the percent reduction for months in excess of 36.	
42	Add line 40 to line 41 to obtain the total percent reduction.	
43	Multiply line 32 by line 42 to obtain the amount of benefit reduction.	
44	Subtract line 43 from line 32, and round to the next lower dollar to obtain your monthly benefit.	
45	If you retired (or plan to retire) after the full retirement age, enter your actual (or planned) age at retirement in years and months, and complete lines 46–50. If you worked (or plan to work) after attaining age 70, enter “70 years 0 months.”	
46	Subtract line 33 from line 45, and convert the result to months to determine the total number of delayed months.	
47	“0.006667” (the decimal equivalent of 16/24 of 1 percent—the monthly percentage increase for persons born 1943 or later) has been entered.	0.006667
48	Multiply line 46 by line 47 to obtain the total percent increase.	
49	Multiply line 32 by line 48 to obtain the amount of benefit increase.	
50	Add line 32 to line 49, and round to the next lower dollar to obtain your monthly benefit.	

Worksheet 1: Indexing of earnings

Year	Your earnings	Maximum taxable earnings (dollars)	Lower of columns 2 or 3	Indexing factor	Column 4 times column 5	Highest indexed earnings
1	2	3	4	5	6	7
1951		3,600				
1952		3,600				
1953		3,600				
1954		3,600				
1955		4,200				
1956		4,200				
1957		4,200				
1958		4,200				
1959		4,800				
1960		4,800				
1961		4,800				
1962		4,800				
1963		4,800				
1964		4,800				
1965		4,800				
1966		6,600				
1967		6,600				
1968		7,800				
1969		7,800				
1970		7,800				
1971		7,800				
1972		9,000				
1973		10,800				
1974		13,200				
1975		14,100				
1976		15,300				
1977		16,500				
1978		17,700				
1979		22,900				
1980		25,900				
1981		29,700				
1982		32,400				
1983		35,700				
1984		37,800				
1985		39,600				
1986		42,000				
1987		43,800				
1988		45,000				
1989		48,000				
1990		51,300				
1991		53,400				
1992		55,500				
1993		57,600				
1994		60,600				
1995		61,200				
1996		62,700				
1997		65,400				
1998		68,400				
1999		72,600				
2000		76,200				
2001		80,400				
2002		84,900				
2003		87,000				
2004		87,900				
2005		90,000				
2006		94,200				
2007		97,500				
2008		102,000				
2009		106,800				

Worksheet 2: Computing the primary insurance amount (PIA) for workers retiring after age 62

Year	1st bend point (dollars)	2nd bend point (dollars)	Cost-of-living increase (percent)	Cost-of-living factor	Years aged 62 or older	PIA (dollars)
	1	2	3	4	5	6
Age 62 PIA						
1979	180	1,085	9.9	1.099		
1980	194	1,171	14.3	1.143		
1981	211	1,274	11.2	1.112		
1982	230	1,388	7.4	1.074		
1983	254	1,528	3.5	1.035		
1984	267	1,612	3.5	1.035		
1985	280	1,691	3.1	1.031		
1986	297	1,790	1.3	1.013		
1987	310	1,866	4.2	1.042		
1988	319	1,922	4.0	1.040		
1989	339	2,044	4.7	1.047		
1990	356	2,145	5.4	1.054		
1991	370	2,230	3.7	1.037		
1992	387	2,333	3.0	1.030		
1993	401	2,420	2.6	1.026		
1994	422	2,545	2.8	1.028		
1995	426	2,567	2.6	1.026		
1996	437	2,635	2.9	1.029		
1997	455	2,741	2.1	1.021		
1998	477	2,875	1.3	1.013		
1999	505	3,043	^a 2.5	1.025		
2000	531	3,202	3.5	1.035		
2001	561	3,381	2.6	1.026		
2002	592	3,567	1.4	1.014		
2003	606	3,653	2.1	1.021		
2004	612	3,689	2.7	1.027		
2005	627	3,779	4.1	1.041		
2006	656	3,955	3.3	1.033		
2007	680	4,100	2.3	1.023		
2008	711	4,288	5.8	1.058		
2009	744	4,483	0.0	1.000		
2010	761	4,586	...	...

NOTE: ... = not applicable.

- a. The December 1999 cost-of-living adjustment (COLA) was originally determined to be 2.4 percent, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the December 1999 COLA had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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GLOSSARY AND ABBREVIATIONS



Glossary

actuarial reduction (OASDI). Reduction in monthly benefit amount payable on—

1. Entitlement prior to full retirement age if the beneficiary is a retired worker, a wife or husband of a retired or disabled worker (with entitlement not based on caring for a child beneficiary), divorced spouse, a widow(er), or a surviving divorced spouse; or
2. Entitlement, in case of disability, at ages 50–59 if the beneficiary is a widow(er) or surviving divorced spouse.

For formulas used to compute the reduction, see "Benefit Types and Levels" in the section Social Security (Old-Age, Survivors, and Disability Insurance).

administrative law judge—ALJ. An official of the Social Security Administration's (SSA's) Office of Disability Adjudication and Review who is specially qualified by education and experience to hold hearings and make independent decisions regarding eligibility for SSA programs based on all the evidence and testimony. ALJs conduct impartial hearings and issue decisions to individuals who have appealed previous determinations by SSA. See also **administrative review process**.

administrative review process (OASDI and SSI). The procedures followed by the Social Security Administration (SSA) in determining one's right under Title II and Title XVI of the Social Security Act. The administrative review process consists of several steps, which must usually be requested within certain time periods, in the following order: initial determination, reconsideration, decision of the administrative law judge, and a review by SSA's Appeals Council.

1. *Initial determination.* A determination SSA makes about an individual's entitlement to benefits or about any other matter that gives that person a right to further administrative and/or judicial review.
2. *Reconsideration.* The first step in the administrative review process. When an individual disagrees with the initial determination, the individual may, within 60 days of receiving notice of the initial determination, ask SSA to reconsider the decision.
3. *Hearing before an administrative law judge (ALJ).* When an individual disagrees with the reconsidered determination, he or she may, within 60 days of receiving notice of the determination, request a hearing before an ALJ.
4. *Appeals Council review.* When an individual disagrees with the decision or dismissal by the ALJ, he or she may, within 60 days of receiving the hearing decision, request that the Appeals Council review that decision. The Appeals Council, within the Office of Disability Adjudication and Review, may deny or dismiss the request for review, or grant the request and either issue a decision or remand (return) the case to an ALJ. The Appeals Council may also review any ALJ action on its own motion within 60 days after the ALJ's action. The Appeals Council's decision, or the hearing decision if the Council denies the request for review, represents SSA's final decision in the administrative review process. See **expedited appeals process** and **federal court review**.

adult (SSI). A person older than age 21, aged 18–21 who is not regularly attending school, or a person under 21 who is married or the head of a household.

age (OASDI). In tables showing beneficiaries in current-payment status, the age classification is based on the age of the person at his or her last birthday. In tables showing awards data, age is the beneficiary's age in the month of award or age in year of the award, as specified.

aged beneficiary (OASDI). A person who qualifies for benefits on the basis of age rather than on the basis of a disability or caring for a child.

aged enrollee (Medicare). An individual, aged 65 or older, who is enrolled in the Medicare program.

aged person (SSI). A person aged 65 or older.

allowance (DI). A determination that a worker is entitled to a cash disability benefit award or to the establishment of a period of disability because of an inability to work by reason of any physical or mental impairment.

allowed charge (Medicare). The amount a physician or provider is allowed to charge Medicare for a covered medical service or supply.

annual maximum taxable limit (OASDI and HI). The dollar amount above which earnings in Social Security-covered employment are neither taxable nor creditable for benefit computation purposes. (Also referred to as "contribution and benefit base," "annual creditable maximum," "maximum contribution and benefit base," "taxable maximum," and "maximum taxable.") Under the Hospital Insurance program, there is no upper limit on earnings subject to taxes. See Table 2.A3.

assigned claim (Medicare). A claim for which the physician or supplier agrees to accept the amount approved by Medicare as the total payment. The physician or supplier is paid 80 percent of the approved fee schedule (less any unmet deductible). The beneficiary can be charged only for the coinsurance, the remaining 20 percent of the approved amount. A participating physician or supplier agrees to accept assignment on all claims.

auxiliary benefit (OASDI). Monthly benefit payable to a spouse or child of a retired or disabled worker, or to a survivor of a deceased worker. (Also known as **dependents benefit**.)

average. See **mean**.

average indexed monthly earnings—AIME (OASDI). The resulting average monthly earnings of a worker after indexing of actual earnings to reflect the value of the individual's previous earnings relative to national average earnings in the indexing year. A formula is then applied to this figure to compute the primary insurance amount (PIA) for most workers who attain age 62, become disabled, or die after 1978. The indexing year is the second year before the year in which the worker attains age 62, becomes disabled, or dies. Taxable earnings after the indexing year are included at their actual value. For widow(er)s first eligible after December 1984, the indexing year applicable to the deceased worker's earnings may alternatively be the second year before the widow(er)'s date of eligibility for survivors benefits if it results in a higher benefit.

Earnings are indexed by multiplying the worker's taxable earnings for each year after 1950 through the indexing year by the average wages of all workers for the indexing year, and dividing by the average wages of all workers for the year being indexed. Once the earnings have been indexed, the AIME is computed by—

1. Determining the number of computation years—the number of years elapsed after attaining age 21 (or 1950, if later) until the year in which the worker attains age 62, becomes disabled, or dies, minus the number (generally 5) of lowest-earnings years dropped out of the computation (the minimum number of computation years is 2);

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2. Selecting the actual computation years, based on highest indexed earnings from any years after 1950; and
 3. Dividing the sum of indexed earnings in the computation years by the total number of months in the computation years.

For workers entitled to disability benefits after June 1980, the number of dropout years varies according to the age attained in year of disability onset. For workers aged 26 or younger, the number of dropout years is 0; for those aged 27–31, 32–36, 37–41, 42–46, and 47 or older, the numbers are 1, 2, 3, 4, and 5, respectively. After June 1981, however, disabled workers may obtain additional dropout years (up to 3, 2, and 1, respectively, for those aged 26 or younger, 27–31, and 32–36) for each year the workers had no earnings and were living with a child (their own or their spouse's) under age 3.

average monthly wage—AMW (OASDI). The amount of earnings used as the basis for determining the primary insurance amount (PIA) for workers who attained age 62, became disabled, or died before 1979, and also under a transitional guarantee computation for workers who attained age 62 in 1979–1983 or survivors of such workers, if the resulting PIA is higher than under the average indexed monthly earnings (AIME) method. The AMW is computed by—

1. Determining the number of computation years—the number of years elapsed after attaining age 21 (or 1950, if later) until the year in which the worker attains age 62 (age 65 for men born before January 2, 1911, and the later of age 62 or the year 1975 for men born after January 1, 1911), becomes disabled, or dies, minus the number (generally 5) of lowest-earnings years dropped out of the computation (the minimum number of computation years is 2);
2. Selecting the actual computation years, based on highest earnings (up to the amount of the annual maximum taxable earnings in each year), from any years after 1950; and
3. Dividing the sum of earnings in the computation years by the total number of months in the computation years.

See the last paragraph under AIME for special dropout rules for disabled workers.

An alternative computation method takes into account the worker's earnings after 1936, if it yields a higher PIA.

award (OASDI). A determination that an individual is entitled to a specified type of benefit. An award action is processed adding the individual to the Social Security benefit rolls maintained for that type of benefit and is counted as an award in a particular month. Award actions are processed not only for new beneficiaries but also for persons already on the rolls whose benefits in one category are terminated but who become entitled to another type of benefit. These actions are called conversions. When a disabled worker attains the full retirement age, the worker benefit and the benefits of spouses and children are converted to the retirement category. Upon the death of a disabled worker, benefits for children are converted to the survivor child category and benefits for spouses caring for these children are converted to widowed mothers and fathers benefits. Benefits for spouses of retired and disabled workers entitled because of age are converted to nondisabled widows and widowers benefits upon the death of the worker. The above conversions are counted in the award data. The benefits for children of retired workers that are converted to benefits for children of deceased workers upon the death of the worker are not counted in the award data.

base years (OASDI). For computing Social Security benefits, the years after 1950 up to the year a person is entitled to retirement or disability benefits. For a survivor's claim, the base years include the year of the worker's death.

bend points (OASDI). The dollar amounts defining the average indexed monthly earnings or primary insurance amount brackets in the benefit formulas. See Tables 2.A11 and 2.A13.

beneficiary (OASDI). A person who has been awarded benefits on the basis of his or her own or another's earnings record. The benefits may be either in current-payment status or withheld.

benefit period (Medicare). An alternate name for **spell of illness**.

benefit reduction (OASDI). See **actuarial reduction**.

benefit termination (OASDI). See **termination**.

benefits in force (OASDI). The sum of the number of persons with benefits in current-payment status and persons with benefits withheld.

benefits withheld (OASDI). See **withholding**.

Black Lung Benefits Program. Provides for monthly payments and medical treatment to coal miners totally disabled from pneumoconiosis (black lung disease) arising from employment in or around the nation's coal mines, augmented payments based on the number of miner's dependents, and payments to certain survivors of miners who died due to or while totally disabled from pneumoconiosis.

blind (OASDI and SSI). "Blindness" for Social Security purposes means either central visual acuity of 20/200 or less in the better eye with the use of a correcting lens, or a limitation in the fields of vision so that the widest diameter of the visual field subtends an angle of 20 degrees or less (tunnel vision).

buy-in (Medicare). A Medicare beneficiary who is also eligible for Medicaid and for whom Part B (Supplementary Medical Insurance) premiums are paid by a state Medicaid program.

capitation (Medicare). A prospective payment method that pays the provider of service a uniform amount for each person served, usually on a monthly basis. Capitation is used in managed care alternatives such as Health Maintenance Organizations.

carrier (Medicare). An entity that the Centers for Medicare & Medicaid Services contracts to process physician/other supplier claims and make payments for Part B (Supplementary Medical Insurance) services.

child (SSI). An unmarried blind or disabled person who is not the head of a household and who is either under age 18 or aged 18–21 and regularly attending school.

childhood disability benefit (OASDI). See **disabled child's benefit**.

child's benefit (OASDI). Monthly benefits payable to children of a retired or disabled worker or of a deceased worker who died either fully or currently insured. Benefits are payable to unmarried children under age 18 (up to age 19 if a full-time student attending elementary or secondary school) and to disabled children aged 18 or older who became disabled before age 22. Under certain circumstances, benefits can be paid to stepchildren, grandchildren, or adopted children. Benefits for disabled children may continue if they marry certain other Social Security beneficiaries.

claimant (OASDI and SSI). The person on whose behalf an application for benefits is filed.

coinsurance (Medicare). See **cost sharing**.

computation starting date (OASDI). December 31 of either 1936 or 1950. Taxable earnings after the applicable starting date are counted in computing average monthly earnings (only starting date of December 31, 1950 is applicable in computing average indexed monthly earnings).

Consumer Price Index—CPI. A relative measure of inflation computed by the U.S. Department of Labor. The CPI charts the rise in costs for selected goods and services and is used to compute cost-of-living increases. In this report, references to the CPI relate to the CPI for Urban Wage Earners and Clerical Workers (CPI-W), unless otherwise noted.

continuing disability review (DI and SSI). A periodic review to determine if a disabled individual is still medically eligible to receive benefits.

contributions (OASDI and Medicare). The amount based on a percentage of earnings, up to an annual maximum, that must be paid by—

1. Employers and employees on wages from employment under FICA (Federal Insurance Contributions Act),
2. The self-employed on net earnings from self-employment under SECA (Self-Employment Contributions Act), and
3. States on the wages of state and local government employees covered under the Social Security Act through voluntary agreements under section 218 of the Act.

Generally, employers withhold contributions from wages, add an equal amount of contributions, and pay both on a current basis. Also referred to as "taxes." See Table 2.A3.

conversion of benefits (OASDI). See **award (OASDI)**.

cost-of-living adjustment—COLA. Social Security benefits and Supplemental Security Income payments are increased each year to keep pace with increases in the cost of living (inflation). The Consumer Price Index is used to compute COLA increases.

cost sharing (Medicare). The generic term that includes copayments, coinsurance, and deductibles.

- *Copayments*—Flat fees, typically modest, that insured persons must pay for a particular unit of services, such as an office visit, emergency room visit, or the filling of a prescription.
- *Coinsurance*—Portion of the costs paid by the beneficiary after meeting the annual deductible.
- *Deductibles*—The annual amount payable by the beneficiary for covered services before Medicare makes reimbursement.

couple (SSI). See **eligible couple**.

covered earnings (OASDI). Earnings in employment covered by the OASDI programs.

covered employment (OASDI). All employment and self-employment creditable for Social Security purposes.

covered worker (OASDI). A person who has earnings creditable for Social Security purposes on the basis of services for wages in covered employment or on the basis of income from self-employment.

creditable coverage (Medicare). Alternative prescription drug coverage in which the actuarial value of the coverage equals or exceeds the actuarial value of standard Medicare prescription drug coverage, as demonstrated through the use of generally accepted actuarial principles and in accordance with Centers for Medicare & Medicaid Services actuarial guidelines. In the absence of creditable coverage, a late enrollment penalty is imposed on beneficiaries who delay signing up for Part D after their initial enrollment period.

current-payment status (OASDI). Status of a beneficiary who is paid a benefit for a given month, with or without deductions, provided the deductions add to less than a full month's benefit. The amount shown is prior to deduction for the Medicare Part B (Supplementary Medical Insurance) premium. A benefit in current-payment status at the end of a month is usually payable in the following month.

deductible (Medicare). The amount paid by enrollees for covered services before Medicare makes reimbursements.

- *Hospital Insurance*—Deductible applies to each new benefit period. It is determined each year by a formula specified by law, and approximates the current cost of a 1-day inpatient hospital stay.
- *Supplementary Medical Insurance*—Deductible is the first \$100 of covered charges per calendar year.

deeming (SSI). Accounting for the income and resources of certain persons who live with an SSI recipient when determining the payment amount. These persons include the ineligible spouses of adult recipients, the ineligible parents of child recipients under age 18, and the immigration sponsor for certain noncitizens.

delayed retirement credit (OASDI). A credit that increases the benefit amount for certain individuals who did not receive benefits for months after attainment of the full retirement age but before age 70. Delayed retirement credit increases are applicable for benefits beginning January of the year following the year the individual attains full retirement age.

Each monthly credit serves as a basis for increasing the monthly benefit (unless the benefit is based on a special minimum primary insurance amount [PIA]) by specified percentages that depend on the year the worker attains age 62. The monthly credit was 1/12 of 1 percent for workers who attained age 62 before 1979 and 1/4 of 1 percent for workers who attained age 62 from 1979 through 1986. The corresponding monthly credits for workers who attain age 62 after 1986 are shown in Table 2.A20. The increase is applicable to the worker's monthly benefit amount but not to his or her PIA, therefore, auxiliary benefits are generally not affected. However, a widow(er)'s benefit may be increased based on the credit that had been applied to the benefit of the deceased worker or for which the worker was eligible at the time of death.

dependents benefit (OASDI). Monthly benefit payable to a spouse or child of a retired or disabled worker.

diagnosis-related groups (Medicare). A classification system that groups patients according to diagnosis, type of treatment, age, and other relevant criteria. Under the prospective payment system, hospitals are paid a set fee for treatment of patients in a single diagnosis-related groups category, regardless of the actual cost of care for the individual.

direct deposit (OASDI and SSI). A method of payment whereby beneficiaries have their monthly benefits sent electronically to financial institutions they designate. Also referred to as electronic funds transfer (EFT).

disability (DI). The inability to engage in substantial gainful activity (SGA) by reason of any medically determinable physical or mental impairment that can be expected to result in death or can be expected to last for a continuous period of not less than 12 months. Special rules apply for workers aged 55 or older whose disability is based on blindness.

The law generally requires that a person be disabled continuously for 5 full months before he or she can qualify for a disabled-worker benefit.

disability (SSI). The inability to engage in substantial gainful activity (SGA) by reason of any medically determinable physical or mental impairment that can be expected to result in death or can be expected to last for a continuous period of not less than 12 months. This 12-month requirement does not apply to the blind.

The SGA criterion does not apply to children under age 18. The standard for them is a medically determinable physical or mental impairment which results in marked and severe functional limitations.

disabled child's benefit (OASDI). A monthly benefit payable to a disabled person aged 18 or older—a child or stepchild or eligible grandchild of retired, deceased, or disabled worker—whose disability began before age 22. (Also referred to as "disabled adult child.")

disabled enrollee (Medicare). A person under age 65 who has been entitled to disability benefits under Title II of the Social Security Act or Railroad Retirement system for at least 2 years.

disabled surviving divorced husband's benefit (OASDI). See **widow(er)'s benefit**.

disabled surviving divorced wife's benefit (OASDI). See **widow(er)'s benefit**.

disabled widow(er)'s benefit (OASDI). See **widow(er)'s benefit**.

disabled-worker benefit (DI). A monthly benefit payable to a disabled worker under full retirement age insured for disability. Before November 1960, disability benefits were limited to disabled workers aged 50–64.

divorced husband's benefit (OASDI). See **husband's benefit**.

divorced wife's benefit (OASDI). See **wife's benefit**.

dropout years (OASDI). Years dropped out of the computation period in determining average indexed monthly earnings (AIME). Dropout years are those with the lowest earnings during the worker's lifetime. The number of years dropped out of the computation period is generally the maximum of 5, but can vary, depending primarily on the worker's age at death or disability onset. Other factors may apply. See **average indexed monthly earnings—AIME**.

drug addiction and alcoholism (OASDI and SSI). Legislation enacted in 1996 eliminated drug addiction and alcoholism as a basis for entitlement to Social Security and SSI disability benefits, effective January 1, 1997. Individuals for whom drugs and/or alcohol is deemed a contributing factor material to the determination of disability cannot be entitled to disability benefits.

dual entitlement (OASDI). Entitlement to a worker (primary) benefit and a higher secondary benefit, usually a spouse's or widow(er)'s benefit. The primary benefit is paid in full but the secondary benefit is paid only in the amount by which it exceeds the primary benefit. If the two benefits are financed from the same trust fund, the beneficiary is usually represented only once in the statistics, as a retired-worker-

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- worker beneficiary, and the benefit amount recorded is the larger amount associated with the auxiliary benefit. If the benefits are paid from different trust funds the beneficiary is represented twice, and the respective benefit amounts are recorded for each type of benefit.
- durable medical equipment (Medicare).** Includes certain medical supplies and such items as hospital beds and wheel chairs used in a patient's home.
- early retirement (OASDI).** Retirement prior to the full retirement age.
- earnings (OASDI and Medicare).** All wages from employment and net earnings from self-employment, whether or not taxable or covered.
- earnings test (OASDI).** The provision requiring the withholding of benefits if nondisabled beneficiaries under full retirement age have earnings in excess of certain exempt amounts. See Table 2.A29.
- eligible couple (SSI).** Two persons living together as married, both of whom are eligible for SSI.
- eligible individual (SSI).** An aged, blind, or disabled person eligible for SSI.
- eligible worker (OASDI).** For retirement benefits, an individual who meets the insured status and age requirements for benefits whether or not he or she has filed an application; for Disability Insurance benefits, an individual who meets the insured status requirements and has established a period of disability.
- emergency advance payments (SSI).** Payments available at initial application for individuals who need cash assistance before their first Supplemental Security Income payment arrives. This advance is withheld from the first check.
- end-stage renal disease (Medicare).** Permanent kidney failure.
- entitlement (OASDI).** The state of meeting the applicable requirements for receipt of benefits, including the filing of an application. Entitlement can be retroactive and thus precede the date of award. The retroactive period can be 12 months for disabled workers, their spouses and children, and disabled widow(er)s. The maximum retroactive period for other types of benefits is 6 months. Retroactive benefits for months before full retirement age are not payable to a retired worker, a spouse, or a widow(er) if a permanent reduction of the monthly benefit amount would result. However, persons filing for a widow(er)'s benefit in the month immediately following the month of the worker's death may elect a 1-month retroactivity, even if reduced benefits would result. A person can be entitled to more than one benefit simultaneously. See **dual entitlement**.
- expedited appeals process (OASDI and SSI).** This permits an individual to go directly to a federal district court after review of the initial determination without first completing the administrative review process, if the only dispute is whether an applicable provision of the Social Security Act is constitutional. See **administrative review process**.
- family benefit (OASDI).** The sum of the individual monthly benefits payable to all the beneficiaries entitled on the basis of a single earnings record. See **maximum family benefit**.
- family classification (OASDI).** As used in statistical tables, the number and types of beneficiaries entitled to benefits on a single earnings record. Since the family classification is determined by the types of beneficiaries entitled, it can differ from actual family status. For example, a married couple is classified as a worker-and-spouse family if
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both persons are entitled on the earnings record of one of them. If both persons were entitled on their own earnings record they would be designated as two worker-only families.

father's benefit (OASDI). A monthly benefit payable to a widower or surviving divorced father if (1) the deceased worker on whose account the benefit is paid was either fully or currently insured at the time of death and (2) an entitled child of the worker in his care is under age 16 or is disabled.

federal benefit rates (SSI). The basic benefit standards used in computing the amount of federal SSI payments. Benefit levels differ for individuals and couples living in households and for persons in Medicaid institutions. Individuals or couples living in their own households receive the full federal benefit. The federal benefit is reduced by one-third if an individual or couple is living in another person's household and receiving support and maintenance there. The federal benefit rates are increased annually to reflect increases in the cost of living.

federal court review (OASDI and SSI). When an individual disagrees with SSA's final decision he or she may request judicial review by filing a civil action in a federal district court. See **administrative review process**.

federally administered payments (SSI). Federal SSI payments and state supplementation payments issued by the Social Security Administration on behalf of the states.

federally administered state supplementation (SSI). Cash payments provided by a state and issued by the Social Security Administration, which is also responsible for the maintenance of payment records. See **state supplementation**.

Food Stamp Program. The program issues monthly allotments of coupons that are redeemable at retail food stores, or provides benefits through electronic benefit transfer to help individuals and families with little or no income to buy food.

full retirement age—FRA (OASI). The age at which a person may first become entitled to unreduced retirement benefits. For persons attaining age 62 before 2000, the full retirement age is 65. Beginning with an increase to 65 years and 2 months for persons reaching age 65 in 2003, FRA is increasing gradually to 67 for persons reaching that age in 2027 or later. The higher full retirement age affects the benefit amount if a person chooses to receive benefits before attaining the FRA. See Table 2.A17.1.

government pension offset (OASDI). A law that affects spouse's or widow(er)'s benefits. Benefits are subject to reduction by any government pensions payable to the spouse on the basis of his or her own earnings in noncovered employment. The offset reduces the Social Security benefit amount by two-thirds of the amount of the government pension.

For more information, see "Government Pension Offset" in the section Social Security (Old-Age, Survivors, and Disability Insurance).

gross domestic product—GDP. The total dollar value of all goods and services produced by labor and property located in the United States, regardless of who supplies the labor or property.

health maintenance organization (Medicare). One of several competitive medical plans, including Medicare Advantage, that have contracts with the Centers for Medicare & Medicaid Services on a prospective capitation basis for providing health care to Medicare beneficiaries.

home health agency (Medicare and Medicaid). A public or private organization that provides skilled nursing services and other therapeutic services in the patient's home and that meets certain conditions to ensure the health and safety of the individual.

home health services (Medicare and Medicaid). Items furnished in a patient's home under the care of physicians. These services are furnished under a plan established and periodically reviewed by a physician. They include part-time or intermittent skilled nursing care; physical, occupational, or speech therapy; medical social services; medical supplies and appliances (other than drugs and biologicals); home health aid services; and services of interns and residents.

hospice (Medicare and Medicaid). A public agency or private organization that is primarily engaged in providing pain relief, symptom management, and supportive services to patients that are certified to be terminally ill. Medicare beneficiaries may elect to receive hospice care instead of standard Medicare benefits for terminal illnesses.

husband's benefit (OASDI). Monthly benefit payable to a husband or a divorced husband (aged 62 or older) of a retired or disabled worker. See **spouse's benefit**.

independent laboratory services (Medicare). Diagnostic laboratory tests ordered by a physician and performed in a laboratory independent of a physician's office or a hospital.

inpatient hospital services (Medicare). Items and services furnished to an inpatient of a hospital by the hospital, including room and board, nursing and related services, diagnostic and therapeutic services, and medical or surgical services.

institutionalization (Medicaid and SSI). Living arrangements for persons in public or private institutions when more than 50 percent of the cost of their care is met by the Medicaid program.

insured status (OASDI). The state of having sufficient quarters of coverage to meet the eligibility requirements for retired-worker or disabled-worker benefits or to permit the worker's spouse and children or survivors to establish eligibility for benefits in the event of his or her disability, retirement, or death. For qualifications, see "Insured Status" in the section Social Security (Old-Age, Survivors, and Disability Insurance).

interim assistance (SSI). Payments made by a state or local government to Supplemental Security Income applicants while their claims are being adjudicated. Repayment is made from the first SSI payment.

intermediary (Medicare). An organization, selected by providers of health care, that has an agreement with the Centers for Medicare & Medicaid Services to process and pay institutional claims and perform other functions under the program.

life expectancy. The average number of years of life remaining at each tabulated birthday. See **life table (period)**.

life table (period). A period life table represents the mortality experience of an entire population during a relatively short period of time, usually 1–3 years. Such tables are useful for analyzing changes in the mortality experienced by a population through time. The table refers to a cohort of 100,000 people with the same birthday who experience the rate of mortality, or probability of death within 1 year, shown in the table, throughout their lives.

lifetime reserve (Medicare). Nonrenewable 60 days of inpatient hospital care to draw on if the 90 covered days per benefit period are exhausted. Patients are required to pay a

daily coinsurance amount equal to one-half of the inpatient hospital deductible for each lifetime reserve day.

limitation of widow(er)'s benefit (OASDI). The reduction of the widow(er)'s benefit due to the early retirement of the deceased spouse. The benefit for a nondisabled widow(er) is limited to the larger of 82 1/2 percent of the deceased spouse's primary insurance amount, or the amount to which the deceased spouse would have been entitled if he or she were still alive. Thus, receipt of benefits by a worker before the full retirement age will result in a reduction of benefits for a widow(er), even if the widow(er) became entitled after his or her own full retirement age. Tables showing data on reduction for early retirement for nondisabled widow(er)s do not include those with limited benefits unless they became entitled before their own full retirement age. See **widow(er)'s benefit**.

low-income subsidy (Medicare). Financial assistance for beneficiaries with limited income and resources. Eligible beneficiaries receive assistance in paying their monthly premium, yearly deductible, prescription coinsurance, and copayments.

lump sum death benefit (OASDI). A one-time payment, generally \$255, payable upon the death of a fully or currently insured worker. The lump sum is payable to the surviving spouse of the worker, under most circumstances. If there is no spouse, the lump sum is payable to the worker's entitled children.

managed care (Medicare). Includes health maintenance organizations, competitive medical plans, and other plans that provide health services on a prepayment basis which is either based on cost or risk depending on the type of contract they have with Medicare. See also **Medicare Advantage**.

mandatory minimum state supplementation (SSI). Required by federal law for individuals converted to the Supplemental Security Income program from state assistance programs for the aged, blind, or disabled. This provision insures that monthly income will not be less than the amount received under the former state programs.

maximum family benefit (OASDI). The maximum monthly amount that can be paid on a worker's earnings record. Whenever the total of the individual monthly benefits payable to all the beneficiaries entitled on one earnings record exceeds the maximum, each dependent's or survivor's benefit is proportionately reduced to bring the total within the maximum. Benefits payable to divorced spouses or surviving divorced spouses are not reduced under the family maximum provision. Tables 2.A13, 2.A14, and 2.A17 give the formulas for computing the maximum family benefit.

maximum taxable (OASDI and Medicare). See **annual maximum taxable limit**.

mean. The arithmetic mean is calculated by dividing the sum of all of the values of a variable by the number of cases. The term "average" used in this publication refers to the arithmetic mean. See also **median**.

median. The median is a measure of central value which identifies that value that divides a distribution in half such that an equal number of cases fall below it as there are above it. See also **mean**.

Medicaid. A federal-state program that provides medical assistance for certain individuals and families with low incomes and limited resources.

medical savings account (Medicare). A plan that provides benefits after a single high deductible is met. Medicare makes an annual deposit to the medical savings account,

and the beneficiary is expected to use that money to pay for medical expenses above the annual deductible.

medically needy (Medicaid). Persons who would be eligible for Medicaid under one of the program's mandatory or optional groups, except that their income or resources are above the eligibility level set by their state. The states may extend eligibility to these otherwise qualified persons by allowing them to "spend down" to Medicaid eligibility by incurring medical or remedial care expenses to offset their excess income, thereby reducing it to a level below the maximum allowed by that state's Medicaid plan.

Medicare. A federally administered health insurance program that covers the cost of hospitalization, medical care, and some related services for most persons aged 65 or older. Also covers persons receiving Social Security Disability Insurance payments for 2 years, and persons with end stage renal disease. Medicare consists of four separate but coordinated programs—Part A (Hospital Insurance), Part B (Supplementary Medical Insurance), Part C (Medicare Advantage) and Part D (Prescription Drug Coverage).

Medicare Advantage. An expanded set of options for the delivery of health care under Medicare established by the Balanced Budget Act of 1997. Most Medicare beneficiaries can choose to receive benefits through the original fee-for-service program or through one of the following Medicare Advantage plans: (1) coordinated care plans (such as health maintenance organizations, provider sponsored organizations, and preferred provider organizations); (2) medical savings account/deductible plans; or (3) private fee-for-service plans.

Medicare economic index. An index that is often used in the calculation of the increases in the prevailing charge levels that help to determine allowed charges for physician services. In 1991 and later, this index is considered in connection with the update factor for the physician fee schedule.

Medigap (Medicare). A term used for private health insurance that pays, within limits, most of the health care service charges not covered by Part A (Hospital Insurance) or Part B (Supplementary Medical Insurance).

military wage credits (OASDI and Medicare). Credits recognizing that military personnel receive wages in kind (such as food and shelter) in addition to their basic pay and other cash payments. Noncontributory wage credits of \$160 are provided for each month of active military service from September 16, 1940, through December 31, 1956. For years after 1956, the basic pay of military personnel is covered under the Social Security program on a contributory basis. See Table 2.A2 for amounts of noncontributory wage credits for 1957–2001. Noncontributory wage credits were eliminated for all years after 2001.

minimum benefit (OASDI). The lowest benefit (before actuarial reduction) payable to a retired worker, a disabled worker, or a sole survivor of a deceased worker. The minimum benefit was eliminated for most workers who attain age 62, become disabled, or die after 1981.

monthly benefit (OASDI). The amount payable after reduction, if necessary, for age, family maximum, and other reasons but before any deduction for Supplementary Medical Insurance (SMI) premiums. Effective June 1982, the final benefit payment is rounded to the next lowest \$1 (if not already a multiple of \$1) after reduction for age, family maximum, and other reasons and after any deduction for SMI premiums. The tables in this publication reflect the monthly benefit credited (MBC) which is calculated as follows:

1. Subtract the SMI premium from the monthly benefit amount;
2. Round the above result down to the nearest whole dollar; and

3. Add back the SMI premium to the rounded result from 2 above.

For example, if a monthly benefit amount is \$968.20, and an SMI premium of \$96.40 is deducted, the MBC is \$967.40 (calculated as follows: $\$968.20 - \$96.40 = \$871.80$ rounded down to $\$871.00 + \$96.40 = \$967.40$).

mother's benefit (OASDI). A monthly benefit payable to a widow or surviving divorced mother if (1) the deceased worker on whose account the benefit is paid was either fully or currently insured at the time of his death and (2) the entitled child of the worker is in her care and is under age 16 or disabled.

nondisabled widow(er)'s benefit (OASDI). See **widow(er)'s benefit**.

nonpayment status (OASDI). See **withholding**.

normal retirement age (OASI). See **full retirement age**.

old-age benefit (OASI). See **retired-worker benefit**.

Old-Age, Survivors, and Disability Insurance—OASDI. The Social Security programs that pay monthly cash benefits to:

1. Retired-worker (old-age) beneficiaries and their spouses and children as well as to survivors of deceased insured workers (OASI), and
2. Disabled-worker beneficiaries and their spouses and children (DI). Rehabilitation services are also provided for disabled beneficiaries.

optional state supplementation (SSI). May be provided by states to bring the combined Supplemental Security Income and state payment to an amount more nearly commensurate with their costs of living than is the SSI payment alone.

outpatient services (Medicare). Services furnished to outpatients by a participating hospital for diagnosis or treatment of an illness or injury.

own household (SSI). A definition used to determine the federal benefit rates. Applies to adults who either own their living quarters, are liable for the rent, pay their pro rata shares of household expenses, are living in households composed only of recipients of public income-maintenance payments, or are placed by agencies in private households; and to children living in their parent's household. See **federal benefit rates**.

parent's benefit (OASDI). Monthly benefit payable to a dependent parent, aged 62 or older, of a deceased fully insured worker.

payment status (OASDI). The state or condition of a benefit with respect to actual receipt by the beneficiary—that is, whether the benefit is in current-payment status or withheld.

peer review organization (Medicare). A group of practicing physicians and other health care professionals, paid by the federal government, to review the care given to Medicare patients.

physician services (Medicare). Services provided by an individual licensed under state law to practice medicine or osteopathy. Services provided by hospitals are not covered by this provision.

preferred provider organization (Medicare). An arrangement between a provider network and a health insurer or a self-insured employer. Providers generally accept payments less than traditional fee-for-service payments in return for a potentially greater

share of the patient market. Preferred provider organization enrollees are not required to use the preferred providers, but are given financial incentives to do so, such as reduced coinsurance and deductibles. Providers do not accept financial risk for the management of care.

presumptive disability or blindness (SSI). For certain diagnoses, where there is high probability of a favorable medical determination of disability or blindness, payments may be made for up to 6 months before the formal determination if the applicant meets the other eligibility qualifications.

primary insurance amount—PIA (OASDI). The primary insurance amount is related to a worker's average monthly wage or average indexed monthly earnings. The PIA is used to compute all types of benefits payable on the basis of an individual's earnings record. Retired workers electing benefits at the full retirement age and disabled workers who did not receive a retirement benefit reduced for age receive a benefit equal to the PIA. Dependents and survivors of workers receive specified percentages of the PIA subject to the family maximum and entitlement before the full retirement age.

primary insurance amount formula (OASDI). The mathematical formula relating the primary insurance amount (PIA) to the average indexed monthly earnings (AIME) for workers who attain age 62, become disabled, or die after 1978. The PIA is equal to the sum of 90 percent of AIME up to the first bend point, plus 32 percent of AIME above the first bend point up to the second bend point, plus 15 percent of AIME in excess of the second bend point. Automatic benefit increases are applied beginning with the year of eligibility.

prospective payment system (Medicare). A method of reimbursement for hospitals that was implemented effective with hospital cost reporting periods beginning on or after October 1, 1983. Under this system, Medicare payment is made at a predetermined, specific rate for each discharge. All discharges are classified according to a list of diagnosis-related groups.

Prouty benefit (OASI). See **special age-72 benefit**.

provider (Medicare and Medicaid). *Medicare*—A provider is a facility, supplier, or physician who furnishes medical services. *Medicaid*—A provider is a person, group, or agency who provides covered services to enrollees.

qualified Medicare beneficiaries (Medicare and Medicaid). Qualified Medicare beneficiaries are persons with incomes at or below 100 percent of the federal poverty level and resources at or below 200 percent of the Supplemental Security Income limit. Medicaid pays the Medicare (Parts A and B) premiums and the coinsurance and deductibles, subject to limits that states may impose on payment rates.

quarters of coverage (OASDI and Medicare). The crediting of coverage needed for insured status. A worker receives 1 quarter of coverage (up to a total of 4) for a designated amount of annual earnings reported from employment or self-employment. This dollar amount is subject to annual automatic increases in proportion to increases in average earnings. For amounts in years 1939 to present, see Table 2.A7. No more than 4 quarters of coverage may be credited for any calendar year, and no quarter of coverage is credited after the quarter in which death occurred or for a quarter entirely included in a period of disability.

Railroad Retirement. A federal insurance program designed for workers in the railroad industry. The Railroad Retirement Act provides for a system of coordination and financial interchange between the Railroad Retirement program and the Social Security program.

reasonable cost (Medicare). Intermediaries and carriers use the Centers for Medicare & Medicaid Services guidelines to determine reasonable costs incurred by providers in furnishing covered services to enrollees. Reasonable cost is based on the actual cost of providing such services, including direct and indirect costs of providers and excluding any costs that are unnecessary in the efficient delivery of services covered by the Hospital Insurance program.

redetermination (SSI). The periodic review of eligibility for each Supplemental Security Income recipient to ensure that eligibility continues and that payments are in the proper amount.

reduction for early retirement (OASDI). See **actuarial reduction**.

representative payee (OASDI and SSI). A person designated by the Social Security Administration to receive monthly benefits on behalf of a beneficiary when such action appears to be in the beneficiary's best interest. A representative payee is appointed for an adult beneficiary when the beneficiary is physically or mentally incapable of managing his or her own funds. In addition, a payee is usually appointed to receive benefits on behalf of a child under age 18.

retired-worker (old-age) benefit (OASI). Monthly benefit payable to a fully insured retired worker aged 62 or older, or to a person entitled under the transitionally insured status provision in the law. Retired-worker benefit data do not include special age-72 benefits, unless indicated.

Retiree Drug Subsidy (Medicare). One of several options under Medicare that enables employers and unions to continue assisting their Medicare-eligible retirees in obtaining more generous drug coverage. In turn, employers and unions are subsidized for providing this alternative coverage.

retirement age (OASI). The age at which an individual establishes entitlement to retirement benefits. See **full retirement age**.

retirement earnings test (OASDI). See **earnings test**.

secondary benefit (OASDI). Monthly benefit payable to a spouse or child of a retired or disabled worker, or to a survivor of a deceased worker.

Section 1619(a) (SSI). See **special cash payments**.

Section 1619(b) (SSI). See **special recipient status**.

self-employed (OASDI and HI). One who derives income from the operation of a partnership or nonincorporated trade or business.

skilled nursing facility (Medicare). An institution that has a transfer agreement with one or more participating hospitals, is primarily engaged in providing skilled nursing care and rehabilitative services to inpatients, and meets specific regulatory certification requirements.

Social Security number (OASDI and HI). A nine-digit number used to identify the record of earnings an individual has in employment or self-employment covered by Social Security and Medicare.

Social Security Act. Public Law 74-271, enacted August 14, 1935, with subsequent amendments. The Social Security Act consists of 21 titles, of which three have been repealed.

special age-72 benefit (OASI). Monthly benefit payable to men who attained age 72 before 1972 and to women who attained age 72 before 1970 and who do not have sufficient quarters of coverage to qualify for a retired-worker benefit under either the fully or the transitionally insured status provisions. (Also known as **Prouty benefits**.)

special cash payments (SSI). Continuing cash benefits for disabled individuals whose gross earned income is at the amount designated as the substantial gainful activity level. The person must continue to be disabled and meet all other eligibility rules.

special minimum PIA (OASDI). An alternative primary insurance amount (PIA) based on the worker's length (years) of covered employment. It is designed to help those who worked in covered employment for many years but had low earnings. See Table 2.A12 for computation of the special minimum PIA.

special recipient status (SSI). For Medicaid purposes, provides special status to working disabled or blind individuals when their earnings make them ineligible for cash payments.

specified low-income Medicare beneficiaries (Medicare and Medicaid). Persons who meet all Qualified Medicare Beneficiary requirements except that their incomes are slightly higher, though less than 120 percent of the federal poverty level. Medicaid pays their Part B (Supplementary Medical Insurance) premium.

spell of illness (Medicare). A period of consecutive days beginning with the first day on which a beneficiary is furnished inpatient hospital or extended care services and ending with the close of the first period of 60 consecutive days thereafter in which the beneficiary is in neither a hospital or skilled nursing facility.

spouse's benefit (OASDI). Monthly benefit payable to a spouse or a divorced spouse of a retired or disabled worker under one of the following conditions:

1. The spouse is aged 62 or older or has an entitled child of the worker in his or her care who is under age 16 or is disabled; or
2. The divorced spouse is aged 62 or older and was married to the worker for 10 years before the divorce became final. Effective with benefits payable after December 1984, a divorced spouse of an eligible worker can be entitled to benefits if he or she meets the requirements for entitlement and has been divorced for at least 2 years, regardless of whether the worker has filed for benefits or has benefits withheld due to the earnings test. Effective with benefits payable beginning January 1991, the 2-year period is waived if the worker was entitled to benefits before the divorce. The earnings test will continue to apply to the divorced spouse's own earnings; or
3. Effective with benefits payable beginning January 1991, a deemed spouse (including a divorced deemed spouse), regardless of whether the legal spouse is entitled to benefits on the same earnings record. A deemed spouse is a person who entered into an invalid ceremonial marriage in good faith.

state-administered supplementation (SSI). See **state supplementation**.

state supplementation (SSI). Payments to eligible persons made under state provisions. These payments may vary by the recipient's living situation and by geographic area within the state. The payments are federally and state administered.

student benefit (OASDI). Child's benefit payable to a full-time unmarried elementary or secondary school student aged 18–19. Student benefits continue through the earlier of the month the course is completed, the second month after the month the child

attains age 19 if the school operates on a yearly basis, or the final month of the quarter or semester that is in progress when the child reaches age 19 if the school operates on a quarterly or semester basis.

substantial gainful activity (DI and SSI). Remunerative work that is substantial, as determined by the amount of money earned, the number of hours worked, and the nature of the work. See Table 2.A30 for money amounts.

Supplemental Security Income—SSI. Program for the needy aged, blind, and disabled. Replaced the former federal-state programs of Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled.

surviving divorced father's benefit (OASI). See **father's benefit**.

surviving divorced mother's benefit (OASI). See **mother's benefit**.

surviving divorced spouse's benefit (OASI). See **widow(er)'s benefit**.

survivors benefit (OASI). Benefit payable to a survivor of a deceased insured worker.

suspended benefit (OASDI). A benefit not in current-payment status.

taxable earnings (OASDI and HI). Wages in covered employment and/or covered self-employment income at or below the annual maximum taxable amount (see Table 2.A3 for amounts).

For wage earners, taxable earnings may consist of:

1. *Social Security taxable wages.* For each employee, employers are required to report calendar-year wages paid up to the taxable limit, and pay the employer share of Social Security tax on this reported amount. Multiple jobholders whose total reported wages exceed the taxable limit are due a refund on taxes withheld beyond the limit. Employers are not due a refund on their share of these taxes. Reported tip income is taxable (subject to the taxable limit) for employees beginning in 1966 and for employers beginning in 1988. For employers from 1980 through 1987, only the amount of tips added to wages to ensure an employee was paid the federal minimum wage was taxable.
2. *Medicare taxable wages.* Wages were first taxable for Medicare in 1966. Through 1982, employment covered by Social Security was also covered by Medicare. Beginning in 1983, the wages of all federal civilian employees in the Civil Service Retirement System are covered by Medicare only. Also, all state and local government employees hired for positions not covered by Social Security on April 1, 1986 and later are covered by Medicare only. The Medicare annual maximum taxable limit was the same as that for Social Security from 1966 through 1990. The limit was set by law at \$125,000 for 1991, indexed for 1992 and 1993, and eliminated beginning in 1994.

For the self-employed, earnings are likewise subject to both Social Security and Medicare taxes. Taxable earnings consist of net self-employment income which, when combined with any taxable wages for that individual, is at or below any applicable annual maximum taxable amount.

taxable maximum (OASDI and HI). See **annual maximum taxable limit**.

taxable self-employment income (OASDI and HI). See **taxable earnings**.

taxable wages (OASDI and HI). See **taxable earnings**.

taxes (OASDI and HI). See **contributions**.

technical entitlement. A technical entitlement occurs when a beneficiary is entitled to benefits on more than one earnings record but is eligible to receive benefits on only one earnings record. There are two types of technical entitlement: (1) Simultaneous technical entitlement, in which the beneficiary is entitled to the same type of benefit on more than one earnings record; and (2) Potential dual entitlement, in which the secondary benefit amount potentially exceeds the primary benefit, but reduction for age or family maximum causes the primary benefit to exceed the secondary benefit amount.

Temporary Disability Insurance—TDI. Sometimes called cash sickness benefits, TDI provides workers with partial compensation for loss of wages caused by temporary nonoccupational disability. Only five states, Puerto Rico, and the railroad industry have TDI laws.

termination (OASDI). Cessation of payment of a specific type of benefit because the beneficiary is no longer entitled to receive it. For example, benefits might terminate as a result of the death of the beneficiary, the recovery of a disabled beneficiary, or the attainment of age 18 by a child beneficiary. In some cases, the individual may become immediately entitled to another type of benefit (such as the conversion of a disabled-worker beneficiary at full retirement age to a retired-worker beneficiary).

totalization (OASDI). International agreements that coordinate the U.S. Social Security programs with the Social Security programs of other countries are called "totalization agreements."

trust fund (OASDI and Medicare). Four separate accounts in the U.S. Treasury in which are deposited the equivalent of taxes received under the Federal Insurance Contributions Act, the Self-Employment Contributions Act, contributions dealing with coverage of state and local government employees, any sums received under the financial interchange with the railroad retirement account, voluntary hospital and medical insurance premiums, and transfers of federal general revenues. Funds not withdrawn for current monthly or service benefits, the financial interchange, and administrative expenses are invested in interest-bearing federal securities, as required by law.

The interest earned is also deposited in the trust funds.

1. Old-Age and Survivors Insurance (OASI). The trust fund used for paying monthly benefits to retired-worker (old-age) beneficiaries and their spouses and children and to survivors of insured workers.
2. Disability Insurance (DI). The trust fund used for paying monthly benefits to disabled-worker beneficiaries and their spouses and children and for providing rehabilitation services to the disabled.
3. Hospital Insurance (HI). The trust fund used for paying part of the costs of inpatient hospital services and related post-hospital care for aged and disabled individuals who meet the eligibility requirements.
4. Supplementary Medical Insurance (SMI). The trust fund used for paying part of the costs of physicians' services, outpatient hospital services, and other related medical and health services for voluntarily insured aged and disabled individuals.

Unemployment Insurance. A federal-state coordinated program that provides partial income replacement to regularly employed members of the labor force who become involuntarily unemployed. All 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands have unemployment insurance programs.

veterans' benefits. A variety of benefits and services to veterans and their dependents and survivors that include, but are not limited to, disability compensation, benefits for survivors, health care benefits, and educational assistance and training.

widowed father's benefit (OASI). See **father's benefit.**

widowed mother's benefit (OASI). See **mother's benefit.**

widow(er)'s benefit (OASDI). Monthly benefit payable to a widow(er) or surviving divorced widow(er) of a worker fully insured at the time of death, if he or she is (1) aged 60 or older or (2) aged 50–59 and has been disabled throughout a waiting period of 5 consecutive calendar months that began no later than 7 years after the month in which the worker died or after the end of his or her entitlement to benefits as a widowed mother or father.

A surviving divorced widow(er)'s marriage to a worker must have lasted 10 years before the divorce became final. Effective for benefits payable after December 1983, benefits are continued for disabled widow(er)s and surviving divorced widow(er)s who remarry after the age of first eligibility for benefits.

Effective January 1991, benefits may be payable to a deemed widow(er), including a divorced deemed widow(er). A deemed widow(er) is a person who entered into an invalid ceremonial marriage in good faith.

wife's benefit (OASDI). A monthly benefit payable to a wife or divorced wife of a retired or disabled worker. See **spouse's benefit.**

windfall elimination provision—WEP (OASI and DI). A modified benefit formula for determining the primary insurance amount, which eliminates the windfall in benefits for individuals who have only minimal Social Security coverage and will receive a pension based on years of work in noncovered employment. This formula prevents a windfall to persons who receive a pension from a job for which they did not pay Social Security taxes, but who would benefit from provisions aimed at low earners. The WEP reduces the PIA for retired and disabled workers and affects the computation of benefits for these workers and their spouses and children, but does not apply to survivor benefits.

For information about the WEP computation, see “Windfall Elimination Provision” in the section Social Security (Old-Age, Survivors, and Disability Insurance), and Table 2.A11.1.

withholding (OASDI). Suspension of benefit payments until the condition(s) causing deductions are known to have ended. The suspension does not affect eligibility for Hospital Insurance benefits.

worker (OASDI). A person who has earnings creditable for Social Security purposes on the basis of services for wages in covered employment or on the basis of income from covered self-employment. Data on covered self-employment exclude self-employed persons who had no self-employment income taxable or creditable under Social Security because they had wages or salaries reaching the annual taxable maximum reported for the same year.

workers' compensation and public disability benefit offset (DI). A requirement that reduces the benefits to a disabled worker and dependents if the worker also receives workers' compensation (WC) or other public disability benefits (PDB). The reduction continues until the month the worker reaches age 65 or the month the WC/PDB payments stop, whichever comes first.

Abbreviations

ACR	Adjusted Community Rate
AFDC	Aid to Families with Dependent Children
AIME	Average indexed monthly earnings
AMW	Average monthly wage
APTD	Aid to the Permanently and Totally Disabled
BBA	Balanced Budget Act of 1997
CDR	Continuing disability review
CHAMPVA	Civilian Health and Medical Program of the Department of Veterans Affairs
CHIP	Children's Health Insurance Program
CLIA	Clinical Laboratory Improvement Act
CMS	Centers for Medicare & Medicaid Services
COLA	Cost-of-living adjustment
CPI-U	Consumer Price Index for All Urban Consumers
CPI-W	Consumer Price Index for Urban Wage Earners and Clerical Workers
CPS	Current Population Survey
DA&A	Drug addiction and alcoholism
DI	Disability Insurance
DOL	Department of Labor
DRA	Deficit Reduction Act of 2005
DRG	Diagnosis-related group
DSH	Disproportionate share hospital
EPSDT	Early and Periodic Screening, Diagnostic, and Treatment program
ESRD	End-stage renal disease
FDA	Food and Drug Administration
FICA	Federal Insurance Contributions Act
FMAP	Federal medical assistance percentage
FPL	Federal poverty level
FQHC	Federally qualified health center
FRA	Full retirement age
FUTA	Federal Unemployment Tax Act
GDP	Gross domestic product
GPO	Government Pension Offset
HCFA	Health Care Financing Administration
HHA	Home health agency
HHS	Department of Health and Human Services
HI	Hospital Insurance
HMO	Health maintenance organization
ICFs/ID	Intermediate care facilities for the intellectually disabled
IRS	Internal Revenue Service
LCCP	Local coordinated care plans
LIS	Low-income subsidy
MA	Medicare Advantage
MBC	Monthly benefit credited

MBR	Master Beneficiary Record
MIP	Medicare Integrity Program
MMA	Medicare Prescription Drug, Improvement, and Modernization Act
MN	Medically needy
MSA	Medical savings account
NRC	National Research Council
OASDI	Old-Age, Survivors, and Disability Insurance
OASI	Old-Age and Survivors Insurance
OBRA	Omnibus Budget Reconciliation Act
PACE	Programs of all-inclusive care for the elderly
PDP	Prescription Drug Plan
PFFS	Private fee-for-service
PIA	Primary insurance amount
PPO	Preferred provider organization
PPS	Prospective payment system
QC	Quarter of coverage
QI	Qualifying individual
QMB	Qualified Medicare beneficiary
RDS	Retiree Drug Subsidy
RVS	Relative value scale
SCHIP	State Children's Health Insurance Program
SECA	Self-Employment Contributions Act
SGA	Substantial gainful activity
SLMB	Specified low-income Medicare beneficiary
SMI	Supplementary Medical Insurance
SNF	Skilled nursing facility
SSA	Social Security Administration
SSI	Supplemental Security Income
TANF	Temporary Assistance for Needy Families
TDI	Temporary Disability Insurance
VA	Department of Veterans Affairs
VEAP	Veterans' Educational Assistance Program
WEP	Windfall Elimination Provision

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