
**OFFICE OF
THE INSPECTOR GENERAL**

SOCIAL SECURITY ADMINISTRATION

**EFFECTIVENESS OF THE
SOCIAL SECURITY STATEMENT IN
CORRECTING EARNINGS RECORDS**

August 2008

A-15-07-17089

AUDIT REPORT



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SOCIAL SECURITY

MEMORANDUM

Date: August 27, 2008

Refer To:

To: The Commissioner

From: Inspector General

Subject: Effectiveness of the Social Security Statement in Correcting Earnings Records
(A-15-07-17089)

OBJECTIVE

Our objective was to assess the effectiveness of the annual Social Security Statements (Statement) in correcting individuals' earnings records.

BACKGROUND

Section 1143 of the *Social Security Act*¹ requires that the Social Security Administration (SSA) send an annual Statement² of potential Social Security benefits to Social Security numberholders aged 25 and older who are not yet in benefit status and for whom SSA can determine a current mailing address. The Statement contains

1. an estimate of potential monthly Social Security retirement, disability, survivor and auxiliary benefits and a description of benefits under Medicare;
2. the amount of earnings paid to the employee or income from self-employment; and
3. the aggregate taxes paid toward Social Security and Medicare.

¹ 42 U.S.C. § 1320b-13.

² Your Social Security Statement, Form SSA-7005-SM-SI (11/07). See Appendix C for a sample Statement.

The goals of the Statement are to:

1. Verify and ensure the accuracy of a worker's earnings record. The Statement provides workers with an easy way of determining whether their earnings (or self-employment income) are accurately posted on their Social Security record. This is important because the amount of worker's future benefits will be based on his or her earnings record.
2. Educate the public about Social Security programs. The Statement contains information about various benefits to which a worker may be entitled.
3. Assist in financial planning. The Statement contains information about planning for retirement. By reviewing this information, individuals can see if they are on track to meet their retirement goals.

The Statement instructs workers to call the SSA toll-free number to correct inaccurately posted earnings. SSA's policy³ requires that teleservice center (TSC) employees annotate the alleged earnings discrepancy on a computer screen and indicate whether the earnings corrections resulted from a Statement inquiry or for other reasons. The allegation is transferred electronically to a field office (FO) for development and resolution.

In Fiscal Year (FY) 2007, SSA spent about \$42 million to mail about 147 million Statements to eligible workers. To assess the effectiveness of the Statements in correcting earnings records, we

1. contacted TSC and FO personnel to obtain their perspective on the effectiveness of the Statements;
2. analyzed a sample of earnings corrections to determine whether SSA documented the Statement was responsible for the correction; and
3. requested that FOs conduct a special study to provide us with a reason for the earnings correction.

We conducted our audit between November 2007 and March 2008 at Social Security Administration Headquarters; a TSC in Baltimore, Maryland; and the Wilmington, Delaware, FO.

³ SSA, Program Operations Manual System, TSC 18005.050 Procedure 3: Process Earnings Correction on the Earnings Modernization, Item Correction System.

RESULTS OF REVIEW

We were unable to determine whether SSA achieved one of its primary goals of the Statement, that is, to verify and ensure the accuracy of a worker's earnings records. SSA did not maintain information on the effectiveness of the annual Statement in correcting individuals' earnings records. This concern is further supported by a prior Government Accountability Office (GAO) report,⁴ which indicated that SSA did not have any way of knowing or reliably estimating how many of the reported earnings records were corrected as a result of the Statement. However, GAO did not make a recommendation to address this condition.

We contacted TSC and FO personnel⁵ who suggested that the Statements were responsible for 75 to 90 percent of all earnings corrections. Our preliminary analysis showed significantly fewer corrections resulting from the Statements. Our analysis of 50 transactions showed that 7 transactions (14 percent) were initiated as a result of a Statement inquiry. Four of these transactions resulted in \$257,694 in additional wages being credited to the individuals' earnings records. The Statement was effective for correcting these four individuals' earnings records to ensure they receive the amount of future benefits to which they are entitled. The other three transactions were not fully developed because the numberholder did not provide the evidence requested by the FO. For the remaining 43 sample items (86 percent), we found no indication the Statements were responsible for initiating the requested corrections.

From this analysis, we determined that documentation was limited to a data collection screen that captures earnings correction information in narrative form that cannot be readily accessed and summarized. Also, TSC staff did not always comply with SSA's policy to indicate whether the earnings corrections resulted from a Statement inquiry, and there is no similar requirement for FO staff. This noncompliance was addressed in a June 2008 SSA bulletin⁶ that indicated TSC documentation was sometimes poor or nonexistent.

Given that the available data may not fully reflect the utility of the Statement for correcting earnings records, we requested the SSA Philadelphia Regional Office to conduct a 1-week study of earnings corrections. The results showed that of the 76 earnings corrections processed, 61 corrections (80 percent) were made because the Statement contained earnings that differed from the numberholder's records. The other 15 earnings corrections were due to claims inquiries (14) and an Internal Revenue Service notification (1).

⁴ GAO's Report to Congressional Requesters: *Social Security Statements: Social Security Administration Should Better Evaluate Whether Workers Understand Their Statements*, GAO-05-192 (April 2005).

⁵ TSC in Baltimore, Maryland; and the Manassas, Virginia; Wheaton, Maryland; Williamsport, Pennsylvania; and Wilmington, Delaware FOs.

⁶ June 2008 Item Correction (EM 2.8) Tips.

In this instance, the study shows the Statements were effective in correcting earnings records. Although these results cannot be considered a nationwide representation of how the Statements impact earnings corrections, we believe the study shows there is value in collecting this information so the Agency can assess the Statement's effectiveness as it relates to earnings corrections.

Given that SSA spends about \$42 million to issue 147 million Statements annually, information on the effectiveness of this investment would help SSA determine whether it is achieving its intended goals; if not, the Agency can evaluate additional measures that can be taken to optimize the utility of the Statement.

CONCLUSION AND RECOMMENDATIONS

The correction of inaccurate earnings is one of SSA's primary goals for the Statement. SSA does not have a process in place to accurately and reliably measure the effectiveness of the Statements in correcting earnings records. The screen that is annotated when earnings corrections are requested as a result of the Statement is narrative and does not allow SSA to collect usable statistical information. Therefore, SSA cannot determine the number of earnings corrections made as a result of individuals receiving their Statements.

To facilitate achieving its goal of verifying the accuracy of workers' earnings records, SSA should consider transitioning the narrative field to something that can be queried and measured. As such, we recommend SSA develop a process to document the reasons for earnings corrections and measure how effective the Statements are in correcting earnings records.

AGENCY COMMENTS

SSA agreed with the recommendation. The full text of the Agency's comments is included in Appendix D.



Patrick P. O'Carroll, Jr.

Appendices

[APPENDIX A](#) – Acronyms

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Acronyms

FO	Field Office
FY	Fiscal Year
GAO	Government Accountability Office
OIG	Office of the Inspector General
SSA	Social Security Administration
Statement	Social Security Statement
TSC	Teleservice Center
U.S.C.	United States Code

Scope and Methodology

To meet our objective, we performed the following steps.

- Examined prior Government Accountability Office reports on Social Security Statements (Statement).
- Interviewed staff at the Wilmington, Delaware, field office (FO); Baltimore, Maryland, Teleservice Center (TSC); and Division of Earnings Records Operations to discuss the earnings correction process.
- Obtained a list of earnings corrections initiated in Fiscal Year 2007. This listing identified 569,751 corrections by Social Security number.¹
- Selected a random sample of 50 initiated earnings corrections and reviewed the Earnings Modernization Item Correction System screen to determine whether the Report of Contact indicated the correction was the result of the Statement.
- Reviewed the Earnings Modernization (2.8) Clearance Reports for the Philadelphia Region to identify FOs with the greatest number of earnings corrections.
- Requested the Philadelphia Region conduct a special study of earnings corrections processed March 17 through 21, 2008. This study was performed by two FOs in each of the six area offices in the Region. The purpose of this study was to determine whether the corrections were the result of the Statement.

We conducted our audit between November 2007 and March 2008 at Social Security Administration Headquarters; a TSC in Baltimore, Maryland; and the Wilmington, Delaware, FO. The entities audited were the Office of Central Operations and the Deputy Commissioner for Systems. We found the data used for this audit were sufficiently reliable to meet our audit objective.

We conducted this performance audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a

¹ There could have been multiple corrections associated with a Social Security number.

reasonable basis for our findings and conclusions based on our audit objectives.
We believe that the evidence obtained provides a reasonable basis for our
findings and conclusions based on our audit objectives.

Sample Social Security Statement

Prevent identity theft—protect your Social Security number

Your Social Security Statement

Prepared especially for Wanda Worker

March 25, 2008



www.socialsecurity.gov

See inside for your personal information



WANDA WORKER
456 ANYWHERE AVENUE
MAINTOWN, USA 11111-1111

What's inside...

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What Social Security Means To You

This *Social Security Statement* can help you plan for your financial future. It provides estimates of your Social Security benefits under current law and updates your latest reported earnings.

Please read this *Statement* carefully. If you see a mistake, please let us know. That's important because your benefits will be based on our record of your lifetime earnings. We recommend you keep a copy of your *Statement* with your financial records.

Social Security is for people of all ages...

We're more than a retirement program. Social Security also can provide benefits if you become disabled and help support your family after you die.

Work to build a secure future...

Social Security is the largest source of income for most elderly Americans today, but Social Security was never intended to be your only source of income when you retire. You also will need other savings, investments, pensions or retirement accounts to make sure you have enough money to live comfortably when you retire.

Saving and investing wisely are important not only for you and your family, but for the entire country. If you want to learn more about how and why to save, you should visit www.mymoney.gov, a federal government website dedicated to teaching all Americans the basics of financial management.

About Social Security's future...

Social Security is a compact between generations. For decades, America has kept the promise of security for its workers and their families. Now, however, the Social Security system is facing serious financial problems, and action is needed soon to make sure the system will be sound when today's younger workers are ready for retirement.

In 2017 we will begin paying more in benefits than we collect in taxes. Without changes, by 2041 the Social Security Trust Fund will be exhausted* and there will be enough money to pay only about 78 cents for each dollar of scheduled benefits. We need to resolve these issues soon to make sure Social Security continues to provide a foundation of protection for future generations.

Social Security on the Net...

Visit www.socialsecurity.gov on the Internet to learn more about Social Security. You can read our publications, use the *Social Security Benefit Calculators* to calculate future benefits or use our easy online forms to apply for benefits.

Michael J. Astrue
Commissioner

* These estimates are based on the intermediate assumptions from the Social Security Trustees' Annual Report to the Congress.

Your Estimated Benefits

*Retirement	You have earned enough credits to qualify for benefits. At your current earnings rate, if you stop working and start receiving benefits...	
	At age 62, your payment would be about.....	\$ 1,018 a month
	If you continue working until...	
	your full retirement age (67 years), your payment would be about.....	\$ 1,476 a month
	age 70, your payment would be about.....	\$ 1,840 a month
*Disability	You have earned enough credits to qualify for benefits. If you became disabled right now, your payment would be about.....	\$ 1,350 a month
*Family	If you get retirement or disability benefits, your spouse and children also may qualify for benefits.	
*Survivors	You have earned enough credits for your family to receive survivors benefits. If you die this year, certain members of your family may qualify for the following benefits:	
	Your child.....	\$ 1,053 a month
	Your spouse who is caring for your child.....	\$ 1,053 a month
	Your spouse, if benefits start at full retirement age.....	\$ 1,405 a month
	Total family benefits cannot be more than.....	\$ 2,584 a month
	Your spouse or minor child may be eligible for a special one-time death benefit of \$255.	
Medicare	You have enough credits to qualify for Medicare at age 65. Even if you do not retire at age 65, be sure to contact Social Security three months before your 65th birthday to enroll in Medicare.	

* Your estimated benefits are based on current law. Congress has made changes to the law in the past and can do so at any time. The law governing benefit amounts may change because, by 2041, the payroll taxes collected will be enough to pay only about 78 percent of scheduled benefits.

We based your benefit estimates on these facts:

Your date of birth (please verify your name on page 1 and this date of birth).....	April 5, 1967
Your estimated taxable earnings per year after 2007.....	\$40,352
Your Social Security number (only the last four digits are shown to help prevent identity theft).....	XXX-XX-1234

How Your Benefits Are Estimated

To qualify for benefits, you earn “credits” through your work — up to four each year. This year, for example, you earn one credit for each \$1,050 of wages or self-employment income. When you’ve earned \$4,200, you’ve earned your four credits for the year. Most people need 40 credits, earned over their working lifetime, to receive retirement benefits. For disability and survivors benefits, young people need fewer credits to be eligible.

We checked your records to see whether you have earned enough credits to qualify for benefits. If you haven’t earned enough yet to qualify for any type of benefit, we can’t give you a benefit estimate now. If you continue to work, we’ll give you an estimate when you do qualify.

What we assumed — If you have enough work credits, we estimated your benefit amounts using your average earnings over your working lifetime. For 2008 and later (up to retirement age), we assumed you’ll continue to work and make about the same as you did in 2006 or 2007. We also included credits we assumed you earned last year and this year.

Generally, estimates for older workers are more accurate than those for younger workers because they’re based on a longer earnings history with fewer uncertainties such as earnings fluctuations and future law changes.

These estimates are in today’s dollars. After you start receiving benefits, they will be adjusted for cost-of-living increases.

We can’t provide your actual benefit amount until you apply for benefits. **And that amount may differ from the estimates stated above because:**

- (1) Your earnings may increase or decrease in the future.
- (2) Your estimated benefits are based on current law.

The law governing benefit amounts may change.

- (3) Your benefit amount may be affected by **military service, railroad employment or pensions earned through work on which you did not pay Social Security tax.** Following are two specific instances. You can also visit www.socialsecurity.gov/mystatement to see whether your Social Security benefit amount will be affected.

Windfall Elimination Provision (WEP) — In the future, if you receive a pension from employment in which you do not pay Social Security taxes, such as some federal, state or local government work, some nonprofit organizations or foreign employment, and you also qualify for your own Social Security retirement or disability benefit, your Social Security benefit may be reduced, but not eliminated, by WEP. The amount of the reduction, if any, depends on your earnings and number of years in jobs in which you paid Social Security taxes, and the year you are age 62 or become disabled. For more information, please see *Windfall Elimination Provision* (Publication No. 05-10045) at www.socialsecurity.gov/WEP.

Government Pension Offset (GPO) — If you receive a pension based on federal, state or local government work in which you did not pay Social Security taxes and you qualify, now or in the future, for Social Security benefits as a current or former spouse, widow or widower, you are likely to be affected by GPO. If GPO applies, your Social Security benefit will be reduced by an amount equal to two-thirds of your government pension, and could be reduced to zero. Even if your benefit is reduced to zero, you will be eligible for Medicare at age 65 on your spouse’s record. To learn more, please see *Government Pension Offset* (Publication No. 05-10007) at www.socialsecurity.gov/GPO.

Your Earnings Record

Years You Worked	Your Taxed Social Security Earnings	Your Taxed Medicare Earnings
1983	560	560
1984	1,358	1,358
1985	2,312	2,312
1986	3,756	3,756
1987	5,241	5,241
1988	6,530	6,530
1989	8,074	8,074
1990	10,416	10,416
1991	12,665	12,665
1992	14,921	14,921
1993	16,448	16,448
1994	18,156	18,156
1995	20,054	20,054
1996	22,049	22,049
1997	24,213	24,213
1998	26,267	26,267
1999	28,452	28,452
2000	30,674	30,674
2001	31,991	31,991
2002	32,863	32,863
2003	34,191	34,191
2004	36,288	36,288
2005	38,097	38,097
2006	40,352	40,352
2007	Not yet recorded	Not yet recorded

You and your family may be eligible for valuable benefits:

When you die, your family may be eligible to receive survivors benefits.

Social Security may help you if you become disabled—even at a young age.

A young person who has worked and paid Social Security taxes in as few as two years can be eligible for disability benefits.

Social Security credits you earn move with you from job to job throughout your career.

Total Social Security and Medicare taxes paid over your working career through the last year reported on the chart above:

Estimated taxes paid for Social Security:		Estimated taxes paid for Medicare:	
You paid:	\$28,795	You paid:	\$6,751
Your employers paid:	\$28,795	Your employers paid:	\$6,751

Note: You currently pay 6.2 percent of your salary, up to \$102,000, in Social Security taxes and 1.45 percent in Medicare taxes on your entire salary. Your employer also pays 6.2 percent in Social Security taxes and 1.45 percent in Medicare taxes for you. If you are self-employed, you pay the combined employee and employer amount of 12.4 percent in Social Security taxes and 2.9 percent in Medicare taxes on your net earnings.

Help Us Keep Your Earnings Record Accurate

You, your employer and Social Security share responsibility for the accuracy of your earnings record. Since you began working, we recorded your reported earnings under your name and Social Security number. We have updated your record each time your employer (or you, if you're self-employed) reported your earnings.

Remember, it's your earnings, not the amount of taxes you paid or the number of credits you've earned, that determine your benefit amount. When we figure that amount, we base it on your average earnings over your lifetime. If our records are wrong, you may not receive all the benefits to which you're entitled.

Review this chart carefully using your own records to make sure our information is correct and that we've recorded each year you worked. You're the only person who can look at the earnings chart and know whether it is complete and correct.

Some or all of your earnings from last year may not be shown on your *Statement*. It could be that we still

were processing last year's earnings reports when your *Statement* was prepared. Your complete earnings for last year will be shown on next year's *Statement*. **Note:** If you worked for more than one employer during any year, or if you had both earnings and self-employment income, we combined your earnings for the year.

There's a limit on the amount of earnings on which you pay Social Security taxes each year. The limit increases yearly. Earnings above the limit will not appear on your earnings chart as Social Security earnings. (For Medicare taxes, the maximum earnings amount began rising in 1991. Since 1994, all of your earnings are taxed for Medicare.)

Call us right away at 1-800-772-1213 (7 a.m.–7 p.m. your local time) if any earnings for years before last year are shown incorrectly. Please have your W-2 or tax return for those years available. (If you live outside the U.S., follow the directions at the bottom of page 4.)

Agency Comments



SOCIAL SECURITY

MEMORANDUM

Date: August 18, 2008 **Refer To:** S1J-3

To: Patrick P. O'Carroll, Jr.
Inspector General

From: David V. Foster /s/
Executive Counselor to the Commissioner

Subject Office of the Inspector General (OIG) Draft Report, "Effectiveness of the Social Security Statement in Correcting Earnings Records" (A-15-07-17089)—INFORMATION

We appreciate OIG's efforts in conducting this review. Attached is our response to the recommendation.

Please let me know if we can be of further assistance. Please direct staff inquiries to Ms. Candace Skurnik, Director, Audit Management and Liaison Staff, at (410) 965-4636.

Attachment

**COMMENTS ON THE OFFICE OF THE INSPECTOR GENERAL’S DRAFT REPORT,
“EFFECTIVENESS OF THE SOCIAL SECURITY STATEMENT IN CORRECTING
EARNINGS RECORDS” (A-15-07-17089)**

Thank you for the opportunity to review and provide comments on this draft report. One of our goals for the Social Security statement is to verify and ensure the accuracy of a worker’s earnings record. We encourage individuals to review their earnings history to avoid incorrect benefit payments in the future.

Recommendation 1

Develop a process to document the reasons for earnings corrections and measure how effective the statements are in correcting earnings records.

Comment

We agree. We will make changes in connection with our maintenance activity under Earnings Modernization, estimated for implementation in January 2009. These changes will allow us to measure the effectiveness of the Social Security statement by giving us the ability to determine the number of earnings corrections made as a direct result of individuals receiving their Social Security statements and contacting us about earnings discrepancies.

OIG Contacts and Staff Acknowledgments

OIG Contacts

Kristen Schnatterly, Acting Director, Financial Audit Division, (410) 965-0433

Steven Sachs, Acting Audit Manager, (410) 966-9738

Acknowledgments

In addition to those named above:

Richard Wilson, Senior Auditor

Brennan Kraje, Statistician

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