

Pursuant to Executive Order 14091 (February 16, 2023) on "Further Advancing Racial Equity and Support for Underserved Communities Through the Federal Government"

## 2023 Equity Action Plan Summary

# U.S. Social Security Administration

### Delivering equity through SSA

Social Security provides a financial safety net for millions of people. The mission of the U.S. Social Security Administration (SSA) is to ensure equity and accessibility in delivering Social Security services by improving the customer experience and addressing systemic barriers to participation in our programs. SSA recognizes that our administrative system may pose barriers to people who need our programs the most, including people living with disabilities, populations who have limited English proficiency (LEP), and households that need additional income support due to disability or death of a loved one. SSA is committed to administering our programs in a way that promotes equity by eliminating barriers to participation in our programs, reaching out to people who may be underserved, and improving service delivery.

## New strategies to advance equity

SSA has identified five focus areas for its 2023 Equity Action Plan through internal assessments, feedback from program offices, engagement with local communities via outreach events, existing evidence, and more. SSA will engage the public on these action areas throughout the year and beyond.

**1. Improve access to the Supplemental Security Income (SSI) program for women, families, individuals from underserved communities, and other people facing barriers.** *Eligibility for the SSI program provides access to multiple federal and state assistance programs. The complexity of the SSI program—driven in part by legislative, regulatory, and sub-regulatory requirements—can create burdens for program applicants, recipients, and SSA front-line employees who help claimants understand SSA’s programs and complete forms. Some customers have expressed that they cannot conduct business with SSA online due to limited access to technology, housing insecurity, lack of credit history, or difficulty understanding the procedures to establish online accounts. Many of these barriers are interconnected for families and individuals with limited resources. To address these barriers and others, SSA will:*

- Simplify the process for applying for the SSI program.
- Conduct SSI outreach including holding stakeholder listening sessions, marketing program and policy updates, and informing the public about updates that affect underserved communities.
- Develop, market, and assess the effectiveness of informative materials, including priority language translations, to educate the public and other stakeholders on SSI eligibility and the application process.

New strategies to advance equity

- Complete SSA's regulatory agenda to simplify SSI, particularly In-Kind Support and Maintenance (ISM) policies.

## **2. Improve equity in access to our programs for our customers who communicate primarily in languages other than English.**

*Navigating SSA's processes can be economically, socially, and culturally challenging due to complexities in the application and in the policy. Many applicants with LEP may have difficulty answering questions, leading to incomplete applications and technical denials. Language barriers may also lead to miscommunication between people with LEP and SSA staff who serve them, reducing customer service quality and decreasing customer satisfaction. To address these barriers and others, SSA will:*

- Improve language access by providing printed and online translated materials (prioritized by need or population size), language interpretation services, and culturally competent assistance throughout SSA's administrative processes, for applicants to complete an application, file an appeal, and manage their benefits.
- Improve stakeholder awareness of the process to request free interpreter services in advance of an appointment.
- Improve SSA's use of relevant LEP data by language, location, and age to ensure SSA is aware of and can work to address any difficulties in supporting language access in specific regions or local field offices.
- Train SSA employees and interpreters on how best to support customers requesting interpreter services.

New strategies to advance equity

**3. Reduce pending SSI underpayments to improve equity in the delivery of payments to our customers disproportionately affected by poverty.** *Today, approximately 7.4 million people living in the U.S. receive SSI and count on SSA to provide accurate and timely payments. Complexity in the SSI program can cause payment errors that may adversely affect the economic security of people receiving SSI payments. To address this barrier and others, SSA will:*

- Assess the root causes of improper payments and improve payment accuracy for overpayments and underpayments.
- Establish a dashboard to identify demographic information of customers most affected by underpayments.
- Prioritize releasing underpayments with more than \$5,000 on the record and processing cases involving an SSI underpayment and non-medical redeterminations or limited issues.
- Improve the use of technology and management information to help prevent underpayments, streamline the processing of underpayments, and support other future enhancements to SSI case processing.

New strategies to advance equity

**4. Increase awareness of survivors benefits eligibility for children and families, same-sex couples, and people disproportionately impacted by COVID-19.** *The loss of a family member who contributed to the household income can be devastating both emotionally and financially. Social Security helps by providing survivors benefits for eligible families. Applying for survivors benefits is a straightforward process. However, barriers to survivors benefits for underserved individuals usually involve delays in obtaining death reports for benefits that require proof of death, lack of awareness for eligibility when surviving children live with guardians, and lack of culturally relevant information for LEP communities. To address these barriers and others, SSA will:*

- Audit existing public information materials and revise them using plain language to make the eligibility requirements clear and inclusive for women, same-sex couples and families, people from underserved communities, and others who access public benefits.
- Develop and enact a stakeholder outreach strategy to increase public understanding of survivors benefits, including among Black, Latino, and American Indian and Alaska Native communities that are disproportionately represented in higher mortality rates.
- Revise online information on criteria for benefit entitlement to incorporate cultural nuance and reduce technical jargon.
- Design a culturally sensitive Tribal-focused Benefits Guide and training for the Indian Health Service (IHS) Tribal Benefit Coordinators.

New strategies to advance equity

**5. Increase race and ethnicity data collection to further identify, monitor, and address service inequities.** *Incomplete demographic data in SSA's records can hamper SSA's ability to determine whether its programs are equitably serving applicants and beneficiaries. In 1987, SSA started the Enumeration at Birth (EAB) process with states as an efficient way for parents to obtain a Social Security number (SSN) for a newborn during the birth registration process. This convenient option allows parents to obtain an SSN without having to visit a local Social Security field office or Card Center. However, unlike the standard SSN application, the current EAB process does not collect voluntarily race and ethnicity data. Today, almost all new SSNs are processed through EAB. In FY 2022, EAB accounted for 99 percent of SSNs issued for children under the age of one. The increase in assigning SSNs through EAB led to an unintended 30 plus year period of incomplete voluntary collection of race and ethnicity data in our records. To address these barriers and others, SSA will:*

- Increase voluntary data collection through the SSN Application (Form SS-5, Application for a Social Security Card) to further identify, monitor, and address service inequities to the populations SSA serves.
- Track the voluntary collection of race and ethnicity data in the Demographic Tracking Dashboard to inform collection strategies.
- Partner with states to increase collection of race and ethnicity data in the EAB process for research and statistical purposes.
- Update the SSN application (SS-5) and other collection processes, to reflect the 2024 update of OMB's 1997 Statistical Policy Directive No. 15 (SPD 15): Standards for Maintaining, Collecting, and Presenting Federal Data on Race and Ethnicity.

## What SSA accomplished

Below is a sampling of SSA's progress delivering on equity and racial justice since its first Equity Action Plan in 2022.

- ***Increased language access in application forms***  
In August 2023, SSA made Form SS-5 instructions available in 15 languages other than English and Spanish in local Social Security offices and Card Centers. The non-English instructions will help applicants with LEP complete the English-language form SS-5.
- ***Increased voluntary race and ethnicity reporting opportunities***  
In August 2022, SSA added race and ethnicity questions to the [Online Social Security Number Application Process](#) used to obtain a Social Security card. This has resulted in an increase of voluntary reporting of race and ethnicity information. In September 2023, SSA also added race and ethnicity questions to the [Internet Social Security Number Replacement Card application process](#) used to obtain a replacement card.
- ***Increased the overall number of SSI applications nationally and in underserved communities***  
In FY 2023, SSA launched a new SSI "Basic Needs" campaign to restore applications closer to pre-pandemic levels, in support of its FY 2022-2023 Agency Priority Goal (APG). The APG was to increase SSI applications from underserved communities by 25 percent and nationwide by 15 percent, relative to the 2021 baseline. The agency exceeded its APG target for SSI applications from underserved communities, achieving about 105 percent of its goal. Nationwide, the agency achieved about 99 percent of its goal for SSI applications.

What SSA accomplished

- ***Increased gender equity and equality in SSA programs***  
In September 2023, SSA updated its policy to offer people the choice to self-select their gender on their SSN record. People who update their gender marker will still need to show a current document to prove their identity, but they will no longer need to provide medical or legal documentation of their gender.
- ***Established the Office of Transformation (OT), which includes SSA's Customer Experience (CX) team***  
The OT's mission is to facilitate the most critical business enhancements that serve the public and support SSA's frontline employees. The mission is underpinned by CX to ensure equitable access to SSA programs by providing a fair, equitable, accessible experience. The OT is undertaking the SSI simplification equity strategy and plans to include accessibility expertise to ensure greater disability equity in SSA initiatives.
- ***Established the Office of Native American Partnerships***  
The Office of Native American Partnership's mission is to elevate and centralize efforts to administer comprehensive programs and policies related to American Indians and Alaska Natives. The Office also works to enhance the agency's relationship with Tribes, serving as the primary point of contact on Tribal affairs for all stakeholders.