

# O A S I S

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SSA Awards Issue



## SSA and SSI: The tenth anniversary

First of a two-part series.

This month, SSA passed an important milestone in its history. Ten years ago, on January 1, 1974, we launched a new program, Supplemental Security Income. SSI replaced the State-administered adult public assistance programs--old-age assistance, aid to the blind, and aid to the permanently and totally disabled.

The earlier form of welfare for the aged and for disabled adults had been almost exclusively a State-and-local operation, although it was basically federally financed. To a large extent, each State decided the amount of the welfare benefit it felt was appropriate and how individuals would be determined eligible for assistance.

Why did the Congress put SSI into effect? To assure a minimum level of payments for aged, blind and disabled people with income and resources below specified levels. The new program also meant uniform eligibility conditions throughout the country and provided equal and efficient administration.

The SSI program has always been a Federal-State partnership. Under agreements with States, SSA administers State supplementary payments. All Federal SSI payments and the cost of administering the program come from general revenues rather than from the Social Security trust funds. SSI payments are made in all 50 States, the District of Columbia and the Northern Mariana Islands.

With the coming of SSI, the United States increased its commitment to needy people who are aged, blind or disabled. In calendar year 1973, payments to these groups under State welfare programs totalled \$3.46 billion. In the 12 months ending June 1975, (the first full fiscal year of SSI), \$5.43 billion went to SSI recipients.

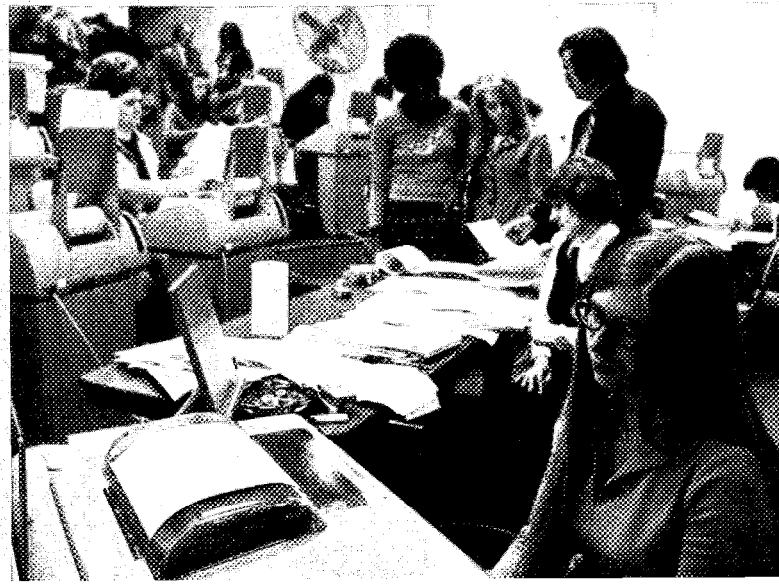
In December 1973, just before SSI began, about 3 million people were on the State adult welfare rolls. By June 1974, SSI payments went to 3.6 million recipients, with the number increasing to 4.1 million in June 1975.

SSI is one Federal program that has not grown in numbers of re-

cipients since 1975. In December 1983, about 4 million recipients received SSI payments. As a matter of fact, the number of aged SSI recipients declined from 2.3 million in June 1975 to about 1.5 million in December 1983.

Why was SSA given the responsibility of running the SSI program? SSA possessed a nationwide network of field offices and a large scale data processing and recordkeeping system. Also, a considerable overlap existed between the clientele of the Social Security program and SSI. Over half of all SSI recipients also receive OASDI benefits.

The Federal SSI benefit rate for an individual with no other countable income rose from \$140 a month in January 1974 to \$314 in January 1984. The monthly rate for couples rose from \$210 in January 1974 to \$472 in January 1984. Looking back over the past 10 years, it seems clear that the SSI program is meeting its primary objectives. SSI payments have enabled needy recipients to keep pace with the cost of living.





Clockwise from lower left: Bureau of District Office Operations staffers who received a group Commissioner's Citation in November 1974 for superior performance in implementing SSI; teletypists from SSA field offices assigned to headquarters to answer SSI queries from the field when the SSADARS system was not operational; crowds of people in the Stockton, Calif., District Office, in January 1974--typical of conditions in Offices across the country.

# The birth and early years of SSI

When the Supplemental Security Income program began a decade ago, it was "the biggest civilian job the Federal Government has undertaken since Medicare," according to then HEW Secretary Caspar Weinberger.

Getting SSI under way was a monumental effort involving tens of thousands of SSAers from coast to coast. Many made considerable personal sacrifices to get the job done under the most trying conditions.

## CONVERSION-A MAJOR TASK

One of the first major tasks in preparing for SSI was the conversion of over 3 million people from State welfare rolls to SSI.

SSA had to deal with 1,152 State and local agencies, with a wide variety of records systems, quality control and adjudicative methods. We were in frequent contact with these agencies by letter and phone and in visits and meetings.

In some States a single welfare office ran the entire adult welfare program. But in others, each county ran its own program. For example, we worked with each California county, including Los Angeles, the county with the largest population in the Nation. New York State had two separate welfare programs--one in New York City and one in the rest of the State.

Some States kept excellent welfare records. In Oklahoma and West Virginia, for example, the files were fully automated. Other States--and most counties we dealt with--had little or no automation. Countless paper files had to be sifted through, with pertinent data put on magnetic tape. State and local agencies used their own staffs for this task or

hired temporary employees. Naturally, many errors were made.

We began getting the first conversion records early in 1973. Here again the quality of the data was uneven. If the welfare agency had regularly checked eligibility factors, the information was good, but this was often not the case. Also, after the States sent in their conversion records, our ongoing SSI system could not make changes entered by the States.

## LAST-MINUTE CHANGES

Two major changes in the SSI program were enacted before it went 'live.' In mid-1973, State supplementation was added, making the entire program much more complex. Then on December 31, 1973, on the eve of SSI, the 'roll-back amendment' was passed, requiring SSA to identify those who came on State disability rolls after July 1, 1973. We then had to determine whether they met SSA's definition of disability. This added a great deal to SSI workloads in SSA and in the State disability determination services (DDSs).

Things became so hectic in the last half of 1973 that SSI conversion staffers in Baltimore sometimes put in 12 hours a day, 7 days a week, working with the welfare agencies to complete the conversion. That kind of dedication was recognized by SSA's first group Commissioner's Citation across bureau lines. Receiving this award were 12 staffers from the old Bureaus of Data Processing and Supplemental Security Income.

Along with conversion, SSA had to build a framework to run SSI. We had to develop policies and procedures to carry out the intent of the very complex law setting up SSI.

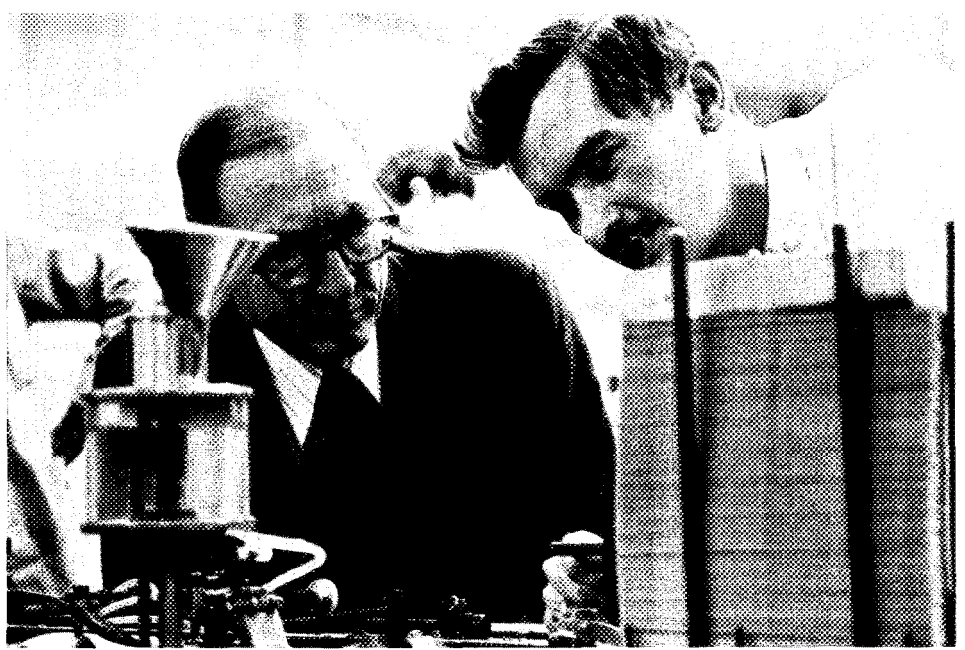
Under a 'grandfather' provision, for example, disabled recipients on State rolls were deemed to meet SSI standards. State limitations on resources and disregards also were grandfathered into SSI for all converted State recipients as were State income disregards for converted blind recipients. On the other hand, Federal rules on income were set uniformly for all recipients.

Second, SSA had to put in place in only 14 months an entirely new automated data processing system as well as a telecommunications system to support our field offices. Our people in the field needed a reliable system for their key role in day-to-day operations. The result was the SSADARS system, which had to connect some 500 high-volume district offices with central office computers. All the new equipment had to be designed, purchased and installed by January 1, 1974. All other field offices had to rely on the old ARS equipment.

## IMPACT ON FIELD

What was happening in the regions to prepare for SSI? About 10,000 new employees came on duty in our field offices to help handle the added work. All needed desks, phones and equipment. Many DOs moved to larger space, and many branch offices and some teleservice centers opened. And nearly all employees received intensive training in SSI.

John Richardson (l.), then San Francisco Regional Commissioner (now retired), and Treasury Department official William Moffett inspect the first batch of SSI checks to be sent out on the West Coast.



Field offices took and processed some 500,000 new SSI claims during 1973. Most of these claimants already received OASDI benefits below the SSI level and had little or no other income. Field staffs also had to contact hundreds of thousands of people moving from State rolls to SSI. DOs had to obtain proofs of age and citizenship, verify addresses, issue correct SSNs, etc.

SSAers in the field helped in other ways. In building its SSI field support staff in Baltimore, the then Bureau of District Office Operations brought in people with DO experience. BDOO had an agreement with some regions to send their best people on the proviso that they would be able to return to their old jobs if they wished. Some stayed to pursue a central office career while others returned to the field with central office experience.

BDOO had a communications and coordination network with the regions. It was in day-to-day and sometimes hour-to-hour contact with the regional SSI coordinators.

Starting on January 2, 1974, thousands of people who had not gotten their new SSI checks began descending on the DOs. At first, nearly all were former State recipients. SSA set up an emergency control center with 26 teletypists from the field to take DO requests for payment status when SSADARS was 'down.' They queried the system and gave the status of the payment as reflected in the data base to the DO by phone, nearly always the same day. When the volume of emergency requests rose, they teletyped replies to the field. This allowed SSA to handle more queries, helping us through the crisis.

Another problem came about as a result of the law enacted the last day of 1973 providing for an increase in SSI payments in January 1974. Recipients were underpaid in January, and their checks had to be adjusted twice in later months. This added to the burden of SSAers in the field who had to explain the changing amounts to recipients.

#### 60,000 INQUIRIES A DAY

SSA expected a maximum of 20,000 queries a day over the SSADARS system from the field. Instead, the number of queries rose sharply to as many as 60,000 a day. DOs sometimes made several queries a day on one case when the recipient was demanding or in severe financial distress. The SSADARS overload caused the system to go "down" several times for extensive periods during the early weeks.

Many former State recipients got the wrong SSI payment, mainly because of errors in the State conversion records. Others received no SSI check at all. The problem was most severe in California, with about 500,000 recipients shifting to SSI, and in New York City, with about 200,000. In New York City freezing weather made matters worse for the very large crowds flocking to the city's 23 SSA offices.

Although from 95 to 98 percent of the 3.2 million people shifting from State to SSI rolls got their checks on time at the start of 1974, tens of thousands didn't. Our response was dramatic.

In New York City, SSA rented 22 heated buses with restrooms to provide shelter for people waiting outside some of our most crowded district and branch offices. This provided breathing space for office staffs to talk with people inside the offices and handle the huge workloads.

Some offices had to close their doors before 10 a.m. because they already had as many people as they could handle during the entire day. Those waiting outside were given numbers and told to return the next day when they would get priority. SSA even rented additional space in New York for use as temporary interviewing centers. Extra security guards were hired in some offices.

Our field staffs across the Nation willingly worked a great deal of overtime as needed. SSA relied heavily on front-line management to use their best judgment in solving problems. The durability, strength and resilience of field office staffers helped SSA get through the hectic early months of 1974.

#### OVERTIME, DETAILS USED

To help out in the hardest-hit offices, about 700 employees from other DOs and other parts of SSA received temporary assignments. Many more had volunteered to go, but space was at a premium in the affected DOs. Nearly all those selected had DO experience or SSI program knowledge.

## The best of times, the worst of times

Although a human tidal wave rolled into our DOs in New York and California, field offices in many other States had far more "walk-in" traffic than normal. After the regular closing time, employees stayed as long as needed to interview everyone waiting. Most teleservice centers stayed open 2 1/2 hours extra, and many installations opened on Saturdays.

For SSI recipients who didn't get their checks, DOs had checks in varying amounts to make advance payments in emergency cases. Later, SSA made one-time payments of \$100 through the system for recipients in dire need.

Many other actions were taken to carry out the intent of the SSI law during 1974-75. For example, we began a redetermination process to check on the continuing eligibility of all SSI recipients and the amount of their payments. SSA also led of a large outreach campaign to identify needy aged and disabled people who might be eligible for SSI. Over 50,000 volunteers helped in this effort. Other activities included creating a new SSI quality assurance program to measure payment accuracy and revising agreements with many States for SSA to determine SSI applicants' eligibility to State Medicaid programs.

SSA took over complex welfare programs from the States and turned them into one nationwide program. And we've made many changes in systems, field operations, policies, etc. to carry out the intent of the SSI law and its amendments.

"Probably the most difficult few months we've ever experienced!" That's how *Willie Simpson*, now Assistant District Manager in Memphis, Tenn., and then an operations supervisor, remembers the first half of 1974. "People flooded into the DO expecting their SSI checks right away. In Memphis, our large waiting room was nearly always full, with crowds in the halls as well. In January 1974, about 1,000 people showed up on many days, three times our usual Monday crowd."

Willie became ADM in Jackson, Tenn., late that month. "Most claims and service reps worked 10 hours a day, 6 days a week for at least 6 months. The dedication of the entire staff was incredible."

*Mildred Wallace*, a claims rep trainee in Memphis when SSI hit, recalls a Saturday training class late in December 1973. "An instructor said, 'We only have one manual, so SSI can't be too difficult.' How wrong he was! SSI living arrangements were especially hard for us to explain to claimants in those early months."

"Folders were piled everywhere," states Claims Rep *Joyce Rasche*, then in the downtown DO and now in the Memphis (E.) Branch. "Many people being converted from State rolls had no SSNs. The State issued 'pseudo' numbers to them so our system would accept the data. Later we had to issue correct numbers and revise the SSI record. Because of mixups, some recipients got one

check with their pseudo number on it and another with their correct SSN in the same month."

*Ida Dowdy*, Operations Supervisor in the Memphis (E.) Branch, recalls that "in early 1975, SSI redeterminations became a large workload. We used to ask a lot of recipients to come in on Saturdays. Then our seven claims reps, the branch manager and I used to conduct 'redet' interviews all day."

While Tennessee didn't have State supplementation, this was still a complicating factor. "People thought SSI payments were uniform across the Nation," says Claims Rep *Paul Lee* in Memphis. "Several recipients who moved here from California were sure they were entitled to the same payment as they'd gotten out there. We had a hard time convincing them that the California State supplement was not guaranteed everywhere."

Los Angeles County had by far the largest number of people moving from State welfare rolls unto SSI. "Our reception room always bulged with people in 1974 and 1975," recalls *Morris Schulat-sky*, Claims Rep in the Hollywood DO. "They spoke a melange of foreign tongues. Our staff could handle the Spanish, German and French interviews, but the rest brought interpreters. Some Armenian, Russian and Yiddish interpreters were as young as 11 or 12. We learned to say "thank you" in four languages or more.

"In those days before specialization, claims reps had to take both SSI and OASDI claims; keep

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two sets of manuals, and give training classes on both programs. Naturally, we often had to work on Saturdays and holidays.

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'SSI meant a new life for many others, too, so it was worth the effort of the past 10 years, helping make SSI and Social Security a good marriage.'

"In St. Louis," remembers *Pat Marsh*, Claims Rep in the downtown DO, "we had to adjust in conducting interviews. We'd never asked personal finance questions before, and we were faced with asking about living arrangements, utilities, rent, etc. At first, some of us didn't go far enough in these matters and others went too far. For example, someone asked a claimant whose heating bill was high, 'Did you leave your windows open?'"

In Michigan, conversion from the State welfare rolls began in the fall of 1973. Assistant District Manager *Leo Hoheisel* in the Detroit (NW.), who was then ARM, Detroit (Dwtn.), acted as liaison with the Wayne County Department of Social Services. "The State welfare staff began reviewing all active case folders to complete conversion data records for input onto SSA's computer system," he recalls. "Locating and collecting 40,000 folders from

many locations and reviewing them was quite a logistical feat.

"When I walked into a large basement room of the Masonic Temple in Detroit, I had misgivings about the project. The room was filled with folding tables stacked with case folders. Over 100 people were reviewing folders while a loudspeaker blared instructions. I soon learned that 165 college students had been temporarily hired, trained in coding conversion cases and put to work reviewing folders. Because of the professionalism of a small cadre of trained Social Services staff and the cooperation between State welfare offices and SSA, the conversion went quite smoothly."

"When we learned SSA would administer SSI, states *Margaret Patterson-Bailey*, District Manager, Detroit (NW. ), "I was ADM in Dearborn, just outside Detroit. I was delighted to help run such a program and knew that SSA staffs would do an excellent job. I had special confidence in our claims reps. Looking back now, my confidence was fully justified.

"But not all our employees were enthusiastic about SSI. Some held negative feelings toward welfare clients and didn't know what to expect. They thought these people would be difficult to deal with.

This attitude was a concern for our management staff. At staff meetings, we talked about the positive aspects of SSI and listened to everyone's views. I encouraged employees to make upbeat remarks about the new program. As the staff learned more about SSI and encountered recipients, many employees came to view SSI in a more positive manner."

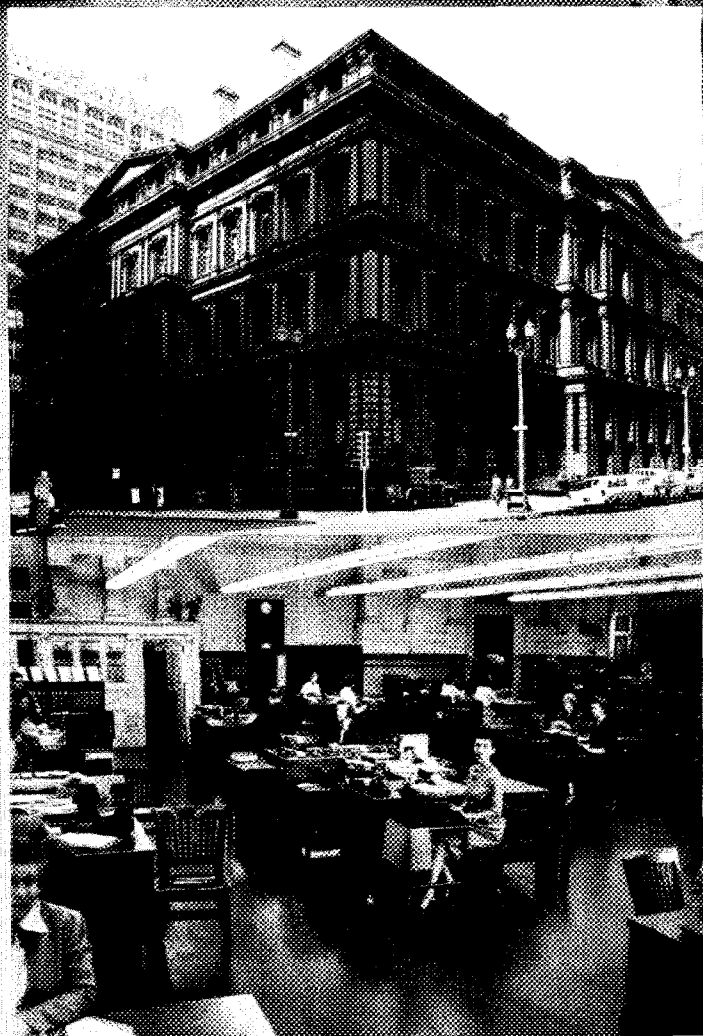
*Rich Shields*, now operations supervisor in Wilkes-Barre, Pa., was a new service rep in the Monticello, N.Y., Branch Office in mid-1973 when he began taking SSI claims. "At that time," he recalls, "SRs handled some SSI interviews. I also keyed SSI claims into the ARS system to be transmitted to Baltimore. Because of the high volume of ARS traffic during normal hours, I often came in at 6 a.m. or waited until after 7 p.m. to get through."

According to *Jack Finnegan*, Area Administrative Assistant in Wilkes-Barre, "I noticed an attraction of claims rep trainees to SSI in the early days. As a brand new CRT in 1974, I volunteered for special SSI projects. We thought we could contribute more in SSI since no one was an expert in that program. On the other hand, the more experienced claims reps tended to prefer the OASDI program because they were more familiar with it. When program specialization came later on, this unofficial grouping was made formal."



**Then and now**  
*(First in a series.)*

Above, the lobby of the Arcade Building; at right, the Old Post Office Building facade and a look inside the DO in 1952.





Things look a lot different now in the St. Louis (Dwtn.), Mo., District Office than they did in the early days of Social Security. From 1937 to 1959, the DO was located in the Old Post Office Building, situated in the heart of the city, near the riverfront (see photos, lower left). And for the next several years, it was in the Arcade Building (see photo at left). The office is now at 210 N. Tucker Blvd., 4 blocks west of the Old Post Office Building (see photos at right).

Of the 35 or so employees who worked at the old site, three are still with the DO--Field Rep *Frank Sclair*, Data Review Technician *Arthur Foiles* and Operations Supervisor *Grace Cole*. Grace started with SSA in 1945 as a GS-1 receptionist.

Frank and Arthur worked in the Old Post Office Building only a short time, but Grace remembers it well. "It was a most impressive structure," she noted. "The architecture was magnificent. There were tall archways with intricate designs carved on them.

"Our office used to be a courtroom, so we even had a jury box complete with mahogany railings and swinging gate. We used it as a waiting area for visitors,

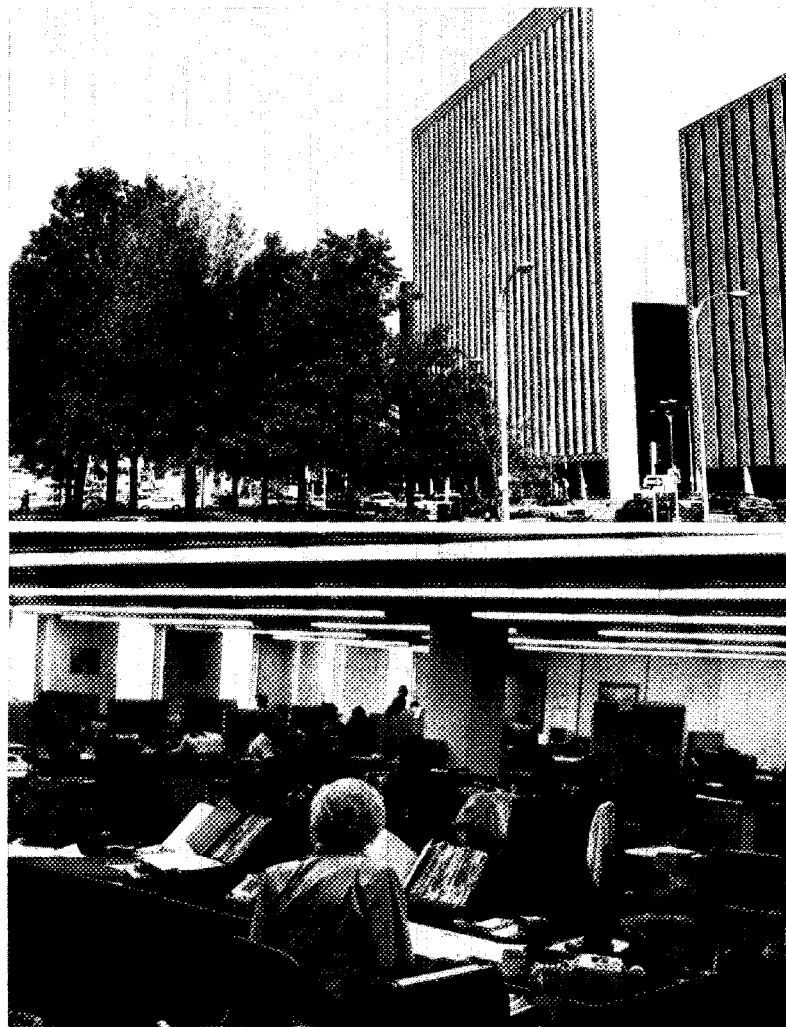
"The building was constructed in the 1870s and had several features for defense purposes. The outside windows had metal shutters, and there were holes for guns. Also, a moat surrounds the whole building, although, as far as I know, no water has ever been in it."

The Old Post Office Building, which has been declared a national historic landmark, was recently restored. Federal agencies still occupy most of it.

Other agencies also occupy the Tucker Blvd. Building, the DO's home since 1971.

Today's DO has 47 employees, about the same number it had 20 years ago. "That was a lot of people then but, of course, the office served a larger area of the city," said *Stan Laurent*, the current District Manager. Since then, other offices have opened to help with the growing workload. "In 1974, when SSI started, our office alone had about 100 employees," he added. "We used to take up portions of 2 of the 18 floors in this building; now, we're only on part of one floor."

"It's a nice, modern building," Grace said, "although it doesn't have the charm and grandeur of the Old Post Office Building."



Above, the Tucker Boulevard Building facade and a current look inside the DO.