



# Annual Statistical Supplement to the Social Security Bulletin, 2007

**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 sections on income maintenance programs—Temporary Assistance for Needy Families, Food Stamps, and the Low-Income Home Energy Assistance Program—have been discontinued.) 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.

General comments or questions about this report are welcome and should be directed to Angela Y. Harper at 410-966-9541 or [supplement@ssa.gov](mailto:supplement@ssa.gov). For answers to specific questions about the data, you will find contact information provided at the bottom of each table.

This report is available on our Web site at <http://www.socialsecurity.gov/policy>, as are the *SSI Annual Statistical Report* and the *Annual Statistical Report on the Social Security Disability Insurance Program*. For additional copies of the *Supplement*, please e-mail [op.publications@ssa.gov](mailto:op.publications@ssa.gov).

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

April 2008

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## Social Security (OASDI)

### Employment and Earnings

Workers in OASDI covered employment, 2006	161.6 million
Average earnings, 2006	\$37,346
Earnings required in 2007 for—	
1 quarter of coverage	\$1,000
Maximum of 4 quarters of coverage	\$4,000
Earnings test exempt amounts for 2007	
Under full retirement age for entire year	\$12,960
For months before reaching full retirement age in 2007	\$34,440
Beginning with month of reaching full retirement age in 2007	Test eliminated

### Program Data

Cost-of-living adjustment for December 2006	3.3 percent
Average monthly benefit, December 2006	
Retired workers	\$1,044
Widows and widowers, nondisabled	\$1,008
Disabled workers	\$978
Number of beneficiaries, December 2006	
Old-Age, Survivors, and Disability Insurance	49.1 million
Old-Age Insurance	
Total	33.9 million
Retired workers	30.9 million
Survivors Insurance	
Total	6.6 million
Widows and widowers, nondisabled	4.3 million
Disability Insurance	
Total	8.6 million
Disabled workers	6.8 million
Benefit payments, 2006	
Old-Age, Survivors, and Disability Insurance	\$546.2 billion
Old-Age and Survivors Insurance	\$454.5 billion
Disability Insurance	\$91.7 billion
Administrative expenses, 2006	
Old-Age and Survivors Insurance	
Amount	\$3.0 billion
As a percentage of total benefits paid	0.7 percent
Disability Insurance	
Amount	\$2.3 billion
As a percentage of total benefits paid	2.5 percent

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## Program Trends

- About 49.1 million persons received Social Security benefits for December 2006, an increase of 676,700 (1.4 percent) since December 2005. Sixty-nine percent were retired workers and their spouses and children, 13 percent were survivors of deceased workers, and 18 percent were disabled workers and their spouses and children.
- Seventy-three percent of the 30.9 million retired workers received reduced benefits because of entitlement prior to full retirement age. Relatively more women (76 percent) than men (71 percent) received reduced benefits.
- The number of beneficiaries aged 65 or older rose from 32.9 million in 2001 to 34.5 million in 2006 (4.7 percent). Beneficiaries aged 85 or older increased at a greater rate during the 5-year period (14 percent) from 4,095,000 in 2001 to 4,668,000 in 2006. In 2006, 43,100 centenarians were receiving Social Security.
- About 19.8 million women aged 65 or older received benefits for December 2006. About 7.9 million (40 percent) were entitled solely to a retired-worker benefit, and 5.9 million (29.6 percent) were dually entitled to a retired-worker benefit and a wife's or widow's benefit. About 6 million (30.3 percent) were receiving wife's or widow's benefits only.
- More than 3 million children under age 18 received benefits, including 1,320,900 children of deceased workers, 1,530,300 children of disabled workers, and 282,300 children of retired workers.
- About 7.8 million persons received benefits based on disability—6,807,000 disabled workers, 777,000 disabled adult children, and 220,000 disabled widows and widowers. In addition, 153,500 spouses and 1,579,900 minor and student children of disabled workers received benefits.
- Average monthly benefits for December 2006, including the 3.3 percent cost-of-living adjustment, were \$1,044 for retired workers, \$978 for disabled workers, and \$1,008 for nondisabled widows and widowers. Among retired workers, benefits averaged \$1,178 for men and \$905 for women. For disabled workers, average benefits were \$1,097 for men and \$840 for women.
- Average monthly family benefits for December 2006 were \$1,955 for a widowed mother or father and children; \$1,668 for a disabled worker, wife, and children; and \$2,104 for a retired worker, wife, and children.
- Total OASDI benefit payments for calendar year 2006 were \$546.2 billion. Payments from the OASI trust fund were \$454.5 billion—an increase of 4.4 percent from the \$435 billion paid in 2005.
- Benefit payments from the DI trust fund, from which benefits are paid to disabled workers, their spouses, and children, increased by 7.5 percent from \$85.4 billion in 2005 to \$91.7 billion in 2006.
- OASDI benefit awards in calendar year 2006 totaled 4,621,100, including 1,999,000 to retired workers, 455,300 to their spouses and children and 869,600 to survivors of insured workers. Benefits were awarded to 798,700 disabled workers and to 498,500 of their spouses and children.

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## Supplemental Security Income

### Annual Payment Adjustments

Monthly federal benefit rate, effective January 2007

Individual living in his or her own household

\$623

Couple with both members eligible

\$934

Cost-of-living adjustment

3.3 percent

### Program Data

Federally administered payments

Benefits paid in 2006

\$38.9 billion

Number of recipients, December 2006

7.2 million

Average benefit, December 2006

\$454.75

Federal SSI payments

Benefits paid in 2006

\$34.7 billion

Number of recipients, December 2006

6.9 million

Average benefit, December 2006

\$423.05

Federally administered state supplementation

Benefits paid in 2006

\$4.2 billion

Number of recipients, December 2006

<sup>a</sup> 2.3 million

Average benefit, December 2006

\$156.24

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

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## Program Trends

- In December 2006, 7,235,583 persons received federally administered SSI payments—121,704 more than the previous year. Of the total, 2,004,476 (27.7 percent) were aged 65 or older; 4,152,130 (57.4 percent) were blind or disabled aged 18–64; and 1,078,977 (14.9 percent) were blind or disabled under age 18.
- The number of blind or disabled aged 18–64 rose by 69,260 (1.7 percent) between December 2005 and December 2006, and the number under age 18 increased by 42,479 (4.1 percent).
- During 2006, 838,448 persons were awarded federally administered payments, a decrease of 13,800 from the previous year. Of the 2006 awards, 556,140 went to blind or disabled recipients aged 18–64, 170,453 to those blind or disabled under age 18, and 111,855 to recipients aged 65 or older.
- Total federally administered SSI payments were \$38.9 billion in 2006, up 4.4 percent from 2005. Federal SSI payments in 2006 were \$34.7 billion (an increase of 5.1 percent over the previous year). Federally administered state supplementation totaled \$4.2 billion.



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## Health Care

### Medicare

Total benefits paid in calendar year 2006	
Hospital Insurance (Part A)	\$189.0 billion
Supplementary Medical Insurance (Part B)	\$213.0 billion
Number of enrollees in July 2006 (one or both of Parts A and B)	43.3 million
Aged	36.3 million
Disabled	7.0 million
Administrative costs, 2006	
Hospital Insurance	
Amount	\$2.9 billion
As a percentage of total benefits paid	1.6 percent
Supplementary Medical Insurance	
Amount	\$3.4 billion
As a percentage of total benefits paid	1.6 percent

### Medicaid

Medical service expenditures in fiscal year 2004	\$257.7 billion
Number of unduplicated recipients, fiscal year 2004	55.0 million
Average 2004 vendor payment per unduplicated recipient	
Persons aged 65 or older	\$13,790
Permanently and totally disabled persons	\$14,070
Dependent children under age 21	\$1,530
Average 2004 vendor payment for medical services	
Nursing facility services	\$24,585
Inpatient general hospital care	\$6,435
Prescribed drugs	\$1,433
Physicians services	\$426

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## Other Social Insurance Programs and Veterans' Benefits

### Unemployment Insurance

Total payments, 2006	\$34.0 billion
Average—	
Weekly benefit amount (regular programs)	\$277.20
Duration of benefits	15.2 weeks
Weekly insured unemployment	2.5 million
Covered employment	132.2 million

### Workers' Compensation

Benefit payments, 2005	\$55.3 billion
Compensation payments	\$29.1 billion
Medical and hospitalization	\$26.2 billion
Benefits paid by—	
Private insurance carriers	\$28.1 billion
State and federal funds	\$14.0 billion
Employers' self-insurance	\$13.1 billion
Covered workers per month	128.1 million
Costs as a percentage of covered payroll	1.70 percent

### Temporary Disability Insurance

Average weekly benefit, 2004	
California	
State fund	\$338
Private plans	\$489
New York	
Private plans	\$185

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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	\$584.00
Maximum family benefit	\$1,168.00
Part B (claims filed before July 1, 1973)	
Number of monthly benefits to miners, widows, and dependents, December 2006	40,018
Total benefits paid, calendar year 2006	\$312.5 million
Part C (claims filed July 1, 1973, or later)	
Total benefits paid, fiscal year 2006	
Disability and survivors benefits	\$304.4 million
Medical benefits	\$40 million

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## Veterans' Benefits

Number of veterans with disability compensation or pension, 2006	
Service-connected disability	2,726,000
Non-service-connected disability	330,000
Monthly payment in 2007 for—	
Service-connected disability	
10 percent disability	\$115
Total disability	\$2,471
Non-service-connected disability (maximum payment)	
Without dependent	\$911
With one dependent and in need of aid and attendance	\$1,801

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## Poverty Data

### Weighted average poverty thresholds, 2006

Individual, aged 65 or older	\$9,669
Couple, householder aged 65 or older	\$12,201
Family of four	\$20,614

### Percentage of population with income below poverty level, 2005

All ages	12.6 percent
Children under the age of 18 living in families	17.1 percent
Persons aged 65 or older	10.1 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 2006, 49.1 million people were receiving benefits at a rate exceeding \$46 billion each month (nearly \$546 billion annually). According to the latest Social Security Trustees Report, these cash benefits made up 4.3 percent of the nation's gross domestic product. During the same year, approximately 162 million employees and self-employed workers, along with employers, contributed \$626 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. Social Security pays benefits to 91 percent of the U.S. population aged 65 or older. It is the major source of income (providing 50 percent or more of total income) for 66 percent of the beneficiaries. It contributes 90 percent or more of income for one-third of the beneficiaries and is the only source of income for 21 percent of them.

### 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-Employed 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—\$97,500 in 2007. 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 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 that contains SSA's mainframe computers that drive SSA systems; much of the executive staff for policy, programs, operations, and systems; as well as field support components.

SSA's field structure is divided into 10 geographic regions containing more than 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 servicing all regions. Teleservice centers offer 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 process a variety of workloads involving disability, international and earnings operations, ongoing eligibility for Supplemental Security Income benefits, 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 workforce (**Tables 2.F1–2.F3**), claims workloads (**Tables 2.F4–2.F6**), delivery of services (**Table 2.F7**), and its 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.

**Tables 2.A1–2.A18** and **2.A29–2.A30** show dates of enactment and list recurring annual changes.

## Coverage and Financing

In 2007, about 163 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 96 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 2007, a domestic employee must earn \$1,500 from any single employer in a calendar year before FICA is withheld. Most election workers must earn \$1,300 in 2007 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—\$97,500 in 2007—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

Insured status is the minimum number of credits a worker must earn to become eligible for his or her own Social Security benefit. Insured status on the insured worker's earnings record is also required to establish eligibility to benefits for the worker's family members or survivors. The requirements for insured status differ depending on the type of benefit involved.

To determine whether a worker has 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 2007, one quarter of coverage (QC) is credited for each \$1,000 in annual covered earnings, up to a maximum of four QCs for the year. Earnings of \$4,000 or more in 2007 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 21 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
Finland	1992	Norway	1984, 2003
France	1988	Portugal	1989
Germany	1979, 1988, 1996	Spain	1988
Greece	1994	Sweden	1987, 2007
Ireland	1993	Switzerland	1980, 1989
		United Kingdom	1985, 1997

International Social Security agreements have two main purposes. First, they eliminate dual Social Security coverage, 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 or upon entitlement to unreduced disability benefits. (Full retirement age [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 1992 through 2007. **Table 2.A9** shows indexed earnings for workers first eligible from 2000 through 2007 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. Dropout years exclude the years of lowest earnings from the computation; there are five dropout years for retirement and survivor computations and many disability insurance benefit computations. Workers disabled before age 47 have zero to 4 dropout years (one-fifth the number of elapsed years). If the resulting number of computation years is less than 2, the number must be raised to 2. In no case are fewer than 2 years used in the computation. The number of computation years for computing retirement benefits is 35 for workers who are 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 2007, the formula provides a PIA equal to the sum of

90 percent of the first \$680 of AIME, plus  
32 percent of the next \$3,420 of AIME, plus  
15 percent of AIME over \$4,100.

The PIA is increased by cost-of-living adjustments (COLAs) beginning with the first year of eligibility. The COLA for 2007 will be effective for December 2006.

**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 1942, the 2004 formula is used and the PIA is increased by COLAs beginning with the one for December 2004. 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 full retirement age for workers born in 1942 is 65 years and 10 months.

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 a percentage increase (after rounding) of at least 0.1 percent

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 for 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 2007 eligibility year is \$340. 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 2007.

Regular PIA, based on AIME of \$800.

$$\$680 \times .90 = \$612.00$$

$$\$120 \times .32 = \$38.40$$

$$\text{PIA} = \$650.40$$

WEP PIA, based on AIME of \$800.

$$\$680 \times .40 = \$272.00$$

$$\$120 \times .32 = \$38.40$$

$$\text{PIA} = \$310.40$$

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 addi-

tional 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, when age 67 becomes the full retirement age. 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 full retirement age 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 par-

ent 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 equivalent component 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

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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 that are described in a subsequent section.

For beneficiaries who are younger than FRA throughout the year:

- The earnings test exempt amount is \$12,960 in 2007.
- Benefits are withheld at the rate of \$1 for each \$2 of earnings above the exempt amount.

For beneficiaries who attain FRA in 2007, the annual earnings test is significantly higher.

- This earnings test exempt amount is \$34,440 in 2007. 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 more than an amount equal to 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 Primary Insurance Amount (PIA) is \$955.50 effective December 2006 and the beneficiary had earnings in 2006, a recomputation would be considered for January 2007. After considering all earnings through 2006, if it is found that the PIA

has increased to \$976.50 as of January 2007, the recomputation can be allowed because the increase is at least \$1.00 over the December 2006 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.

In 2001 the Social Security Administration changed from a periodic adjustment of the earnings amount for a nonblind disabled individual to be considered engaging 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 2007 is \$900 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 2007 is \$1,500 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, including reference to recent changes in thresholds for determining SGA.

## 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 Social Security spouse's or widow's or widower's 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 of that, or \$400, would offset a Social Security spousal benefit. An individ-

ual 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 wife's benefit on her husband's Social Security record, the wife's benefit would not be paid because her own Social Security benefit offset it.

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



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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 2007 federal SSI benefit rate for an individual living in his or her own household and with no other countable income is \$623 monthly; for a couple (with both husband and wife eligible), the SSI benefit rate is \$934 monthly.

Payments under SSI began in January 1974. It 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 monthly in OASDI benefits or other earned or unearned income is not counted. Also excluded is \$65 monthly of 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 \$443 in federal SSI payments

$$\$623 - (\$200 - \$20) = (\$623 - \$180) = \$443.$$

A person whose income consists of \$500 in gross monthly earnings would receive \$415.50 in federal SSI payments

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

$$\text{FBR } \$623 - \$207.50 = \$415.50 \text{ federal SSI}$$

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.

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### 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 (AB) 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 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.

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**1980** (Public Law 96-265, enacted June 9). A disabled recipient who loses federal SSI eligibility because of earnings at the substantial gainful activity 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.<sup>1</sup>

**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 agencies (DDS). 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.

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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.

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**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 unless they are in a “qualified alien” category and meet one of certain exceptions such as lawful permanent residents who earn or can be credited with 40 qualifying quarters of earnings, certain refugee type categories eligible for up to 5 years of time-limited eligibility, or active duty U.S. military or veterans and their spouses and children. Extends eligibility for aliens receiving SSI as of August 22, 1996, (the enactment date of the law) for 1 year after the enactment date for those aliens found ineligible under the new standards.

(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 bene-

fits 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.

### ***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

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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 towards 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 payment of SSI benefits for up to 3 months is 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 benefits 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.

### ***Vocational Rehabilitation 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 vocational rehabilitation 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,

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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 substantial gainful activity 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 vocational rehabilitation program to include blind SSI recipients.

**1990** (Public Law 101-508, enacted November 5). Reimbursement authorized for the cost of vocational rehabilitation 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 in suspense<sup>2</sup> status (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 vocational rehabilitation 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 substantial gainful activity 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. 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

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

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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 provide SSA the authority 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

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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). Offset (by reduction of retroactive Social Security benefits) to prevent persons whose initial OASDI payment is retroactive from receiving more in total benefits than if they were paid the benefits when regularly due.

**1984** (Public Law 98-617, enacted November 8). Offset provision expanded 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 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 where 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.



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## **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 February 8, 2006.

## **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.

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**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 for exclusions for 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 substantial gainful activity. 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

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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.

## 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 calendar 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

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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 (PESS), 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. Individual 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.

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(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). Excludes grants, scholarships, fellowships, or gifts to be used for tuition or educational fees from an individual's countable resources for 9 months after the month of receipt.

### ***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 criteria of eligibility, 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 con-

ditions: (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 payments 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.”

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(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.

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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.

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# Medicare

The following are brief summaries of complex subjects. 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.<sup>1</sup>

## 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. 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 Supplementary Medical Insurance (SMI), which in the past was also known simply as Part B. Part A helps pay for inpatient hospital, home health, 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, 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 (BBA) 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, upon payment of premium, for all beneficiaries, 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 2007, over 44 million are enrolled in one or both of Parts A and B of the Medicare program, and almost 8 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, 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

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1. These summaries were prepared by Earl Dirk Hoffman Jr., Barbara S. Klees, 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.

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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. 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 2006, Part A provided protection against the costs of hospital and specific other medical care to about 43 million people (36 million aged and 7 million disabled enrollees). Part A benefit payments totaled \$189.0 billion in 2006.

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 is covered by Part A only if it follows within 30 days (generally) of a hospitalization of 3 days or more and is certified as medically necessary. Covered services are similar to those for inpatient hospital care, but they also 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 is 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 (DME) may also be provided, although beneficiaries must pay a 20 percent coinsurance for DME, as required under Part B of Medicare. There must be a plan of treatment and periodical review by a physician. Full-time nursing care, food, blood, and drugs are not provided as HHA services.

- Hospice care is a service provided 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 2006, Part B provided protection against the costs of physician and other medical services to about 40 million people (34 million aged and 6 million disabled enrollees). Part B benefits totaled \$165.9 billion in 2006.

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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; also covered are the services provided by these Medicare-approved practitioners who are not physicians: 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 DME 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;
- 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 outpatient treatments for mental illness). 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 Advantage (Part C) is an expanded set of options for the delivery of health care. Although all Medicare beneficiaries can receive their benefits through the original fee-for-service program, most beneficiaries enrolled in Parts A and B can choose to participate in a Medicare Advantage plan instead. Organizations that seek to contract as Medicare Advantage plans must meet specific organizational, financial, and other requirements. Following are the primary Medicare Advantage plans:

- Coordinated care plans, which include health maintenance organizations (HMOs), provider-sponsored organizations (PSOs), preferred provider organizations (PPOs), and other certified coordinated care plans and entities that meet the standards set forth in the law; and
- Private, unrestricted fee-for-service plans, which allow beneficiaries to select certain private providers. For those providers who agree to accept the plan's payment terms and conditions, this option does not place the providers at risk nor does it vary payment rates based on utilization.

These Medicare Advantage plans are required to provide at least the current Medicare benefit package, excluding hospice services. Plans may offer additional covered services and are required to do so (or return excess payments) if plan costs are lower than the Medicare payments received by the plan.

Beginning in 2006, a new regional Medicare Advantage plan program was established that allows regional coordinated care plans to participate in the Medicare Advantage program. There are 26 regions (statute required that between 10 and 50 regions be established), and plans wishing to participate must serve an entire region. There are provisions to encourage plan participation, and a fund was established that is used to encourage plan entry and limit plan withdrawals. Enrollment began in late 2005.

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

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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 2006, Part D provided protection against the costs of prescription drugs to about 28 million people. Part D benefits totaled \$47.1 billion in 2006.

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.) 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 \$96.40 per beneficiary per month in 2008. While this will be the amount paid by most Part B beneficiaries, there are three provisions that can alter the premium rate for certain enrollees. 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. The 2008 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 table on the next page. 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 certain individuals who have their premiums deducted from their Social Security checks.

Income	Income-related monthly adjustment (dollars)	Total monthly premium (dollars)
<b>Beneficiaries who file individual tax returns</b> <i>(single individuals, heads of households, qualifying widow(er)s with dependent children, and married individuals who lived apart from their spouse for the entire taxable year and file separately)</i>		
Less than or equal to \$82,000	0	96.40
Greater than \$82,000 and less than or equal to \$102,000	25.80	122.20
Greater than \$102,000 and less than or equal to \$153,000	64.50	160.90
Greater than \$153,000 and less than or equal to \$205,000	103.30	199.70
Greater than \$205,000	142.00	238.40
<b>Beneficiaries who file joint tax returns</b>		
Less than or equal to \$164,000	0	96.40
Greater than \$164,000 and less than or equal to \$204,000	25.80	122.20
Greater than \$204,000 and less than or equal to \$306,000	64.50	160.90
Greater than \$306,000 and less than or equal to \$410,000	103.30	199.70
Greater than \$410,000	142.00	238.40
<b>Beneficiaries who are married and lived with their spouse at any time during the year but file separate tax returns</b>		
Less than or equal to \$82,000	0	96.40
Greater than \$82,000 and less than or equal to \$123,000	103.30	199.70
Greater than \$123,000	142.00	238.40

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 2008 will be \$27.93; the 2007 amount was \$27.35. The actual Part D premiums paid by individual beneficiaries equal the base beneficiary premiums adjusted by a number of factors. 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 enrollee premium for basic Part D coverage, which reflects the specific plan-by-plan premiums and the actual number of beneficiaries in each plan, will be about \$25 in 2008. 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.

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.

For beneficiaries enrolled 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

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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 (\$1,024 in 2008). 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 (\$256 per day in 2008) 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 (\$512 per day in 2008) 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 (\$128 per day in 2008) is required from the beneficiary. After 100 days of SNF care per benefit period, Medicare pays nothing. 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 \$423 in 2008; for those with 30 to 39 quarters of coverage, the rate will be reduced to \$233. 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.

For Part B, the beneficiary's payment share includes the following: one annual deductible (\$135 in 2008), 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 liable for 50 percent of the approved charges. For services reim-

bursed under the outpatient hospital prospective payment system, coinsurance percentages vary by service and currently fall in the range of 20 percent to 50 percent. For certain services, such as clinical lab tests, home health agency services, and some preventive care services, there are no deductibles or coinsurance.

For the standard Part D benefit design, there is an initial deductible (\$275 in 2008). After meeting the deductible, the beneficiary pays 25 percent of the remaining costs, up to an initial coverage limit (\$2,510 in 2008). The beneficiary is then responsible for all costs until an out-of-pocket threshold is reached. (The 2008 out-of-pocket threshold will be \$4,050, which is equivalent to total covered drug costs of \$5,726.25.) For costs thereafter, there is catastrophic coverage, which requires enrollees to pay the greater of 5 percent coinsurance or a small defined copayment amount (\$2.25 in 2008 for generic or preferred multisource drugs and \$5.60 in 2008 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 exception to this "true out-of-pocket" provision is cost-sharing assistance from the low-income subsidies provided under Part D and from State Pharmacy Assistance programs. 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, partial coverage in the coverage gap. The monthly premiums required for Part D coverage are described in the previous section.

### **Payments to Providers**

For Part A, before 1983, 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

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nursing care, home health care, inpatient rehabilitation hospital care, long-term care hospitals, and hospice are made under separate prospective payment systems. A prospective payment system for inpatient psychiatric hospitals has been implemented and is in a transition period with payments reflecting blends of the old reasonable cost basis payment system and the new prospective payment system.

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. Beginning January 1992, allowed charges are 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.) Payments for durable medical equipment (DME) and clinical laboratory services are also based on a fee schedule. Most hospital outpatient services are reimbursed on a prospective payment system, and home health care is reimbursed under the same prospective payment system as Part A.

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 Medicare beneficiaries may select their doctors, they have the option to choose those who participate.

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. Under the new regional plan program, which began for Medicare Advantage in January 2006, capitated payment rates are based on a competitive bidding process.

For Part D, each month for each plan member, Medicare pays Part D drug plans (stand-alone prescription drug plans [PDPs] and the prescription drug portions of Medicare Advantage plans) their risk-adjusted bid (net of estimated reinsurance), 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 plans with unexpected costs and to share in unexpected savings. The risk corridors become 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.

## 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 the following:

- 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 the following:

- 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.

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 generally oversee the care provided to Medicare beneficiaries in each state and to improve the quality of services. QIOs educate other health care professionals and assist in the effective, efficient, and economical delivery of health care services to the Medicare population. The ongoing effort to combat monetary fraud and abuse in the Medicare program was intensified after enactment of the Health Insurance Portability and Accountability Act of 1996 (Public Law 104-191), which created the Medicare Integrity Program. Before this 1996 legislation, the Centers for Medicare & Medicaid Services (CMS) was limited by law to contracting with its current carriers and fiscal intermediaries to perform payment safeguard activities. The Medicare Integrity Program provided CMS with stable, increasing funding for payment safeguard activities, as well as new authorities to contract with entities to perform specific payment safeguard functions.

## Administration

The Department of Health and Human Services (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 deter-

mining 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, making determinations as to the amount of the individual’s Part B premium if the income-related monthly adjustment applies. The Internal Revenue 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, for 2007 and later, which Part B enrollees are subject to the income-related monthly adjustment amount in their premiums (and to what degree).

A 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.

## Data Summary

The Medicare program covers 95 percent of our nation’s aged population, as well as many people who are on Social Security because of disability. In 2006, Part A covered about 43 million enrollees with benefit payments of \$189.0 billion, Part B covered about 40 million enrollees with benefit payments of \$165.9 billion, and Part D covered about 27.9 million enrollees with benefit payments of \$47.1 billion. Administrative costs in 2006 were under 1.6 percent, 1.9 percent, and 0.7 percent of expenditures for Part A, Part B, and Part D, respectively. Total expenditures for Medicare in 2006 were \$408.3 billion.



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## Medicare: History of Provisions

This section is a summary of select Medicare provisions, based on general interest. 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.** 3 QC for each year after 1966 and before attainment of age 65.

**1972.** Disabled individual, under the age of 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 the age of 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 the age of 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 the age of 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.

#### ***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 the age of 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

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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 prescription drug plan (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 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 skilled nursing facility 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.

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**1997.** Home health services not associated with a hospital or skilled nursing facility 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 a skilled nursing facility 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 a skilled nursing facility (when Part A coverage has been exhausted), in a clinic, rehabilitation agency, public health agency, or by an independently practicing therapist.

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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 health maintenance organizations 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 skilled nursing facility 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 a skilled nursing facility 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

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(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 fre-

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quency 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.

### ***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 the age of 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 it. The extension to include the first 18 months of an individual's entitlement on the basis of ESRD is effective through September 30, 1998.

**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 preferred provider organizations), (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.

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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.)

#### ***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 (TA) 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 prescription drug plan

(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 plans with unexpected costs and to share in unexpected savings; after 2007, the risk corridors will become 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).

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## Medicare Financing

### *Hospital Insurance Taxes*

See Table 2.A3.

### *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 subsidies 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.

### *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 from age 65 up to age 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 were 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 is waived, effective January 2007, and a special enrollment period for these beneficiaries is established.

#### ***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.

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***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. 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.<sup>1</sup>

### 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, known as the State Children's Health Insurance Program (SCHIP), is a program initiated by the Balanced Budget Act (BBA) of 1997 (Public Law 105-33). In addition to allowing states to craft or expand an existing state insurance program, SCHIP provides more federal funds for states to expand

Medicaid eligibility to include a greater number of children who are currently uninsured. With certain exceptions, these are low-income children who would not qualify for Medicaid based on the plan that was in effect on April 15, 1997. Funds from SCHIP also may be used to provide medical assistance to children during a presumptive eligibility period for Medicaid. This is one of several options from which states may select to provide health care coverage for more children, as prescribed within the BBA's Title XXI program.

### Medicaid Eligibility

Medicaid does not provide medical assistance for all poor persons. Under the broadest provisions of the federal statute, Medicaid does not 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 persons 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 the age of 6 whose family income is at or below 133 percent of the federal poverty level (FPL). (As of January 2007, 100 percent of the FPL has been set at \$20,650 for a family of four 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

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1. These summaries were prepared by Earl Dirk Hoffman Jr., Barbara S. Klees, 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.

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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 predate 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 SSI payments because of earnings from work or from increased Social Security benefits but who may keep Medicaid for a period of time).
- All children under the age of 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 will receive federal matching funds for coverage under the Medicaid program include the following:

- Infants up to the age of 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 the age of 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 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 (HCBS) 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 within 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. 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 within the State Children’s Health Insurance Program (SCHIP) established by the Balanced Budget Act (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 that reduce their income to or below 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 a MN program, there are federal requirements that certain groups and certain services must be included, for example, children under the age of 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 within its MN program. As of 2004, 35 states plus the District of Columbia have elected to have a MN program and are providing at least some MN 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 had an impact on 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

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ban; emergency services, however, are mandatory for both of these alien coverage groups. For aliens who lose SSI benefits because of the new restrictions regarding SSI coverage, Medicaid coverage for them 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 before application—if the person would have been eligible 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 the age of 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 has been 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.

## Scope of Medicaid Services

Title XIX of the Social Security Act allows considerable flexibility within 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 the following:

- 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 the age of 21.

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

- Diagnostic services;
- Clinic services;
- Intermediate care facilities for the mentally retarded (ICFs/MR);
- Prescribed drugs and prosthetic devices;
- Optometrist services and eyeglasses;
- Nursing facility services for children under the age of 21;
- Transportation services;
- Rehabilitation and physical therapy services;
- Hospice care;

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- 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 on the basis of 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 (HCBS) 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, other than as a part of respite care, states may not provide room and board for the beneficiaries). With certain exceptions, a state's Medicaid program must allow beneficiaries to have some informed choices among partici-

pating 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 within 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 the age of 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 and family planning services. Under the DRA, new cost sharing and benefit rules provide states with 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

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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 2007, the FMAPs varied from 50 percent in 12 states to 75.89 percent in Mississippi and averaged 56.8 percent overall. The BBA permanently raised the FMAP for the District of Columbia from 50 percent to 70 percent. For children covered through the SCHIP program, the federal government pays states a higher share, or “enhanced” FMAP, that averages about 70 percent for all states.

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 SCHIP program, the QI program, and DSH payments, 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 assured Medicaid coverage to an expanded 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 2004, for example, indicate that Medicaid payments for services for 28.6 million children, who constituted 52 percent of all Medicaid beneficiaries, averaged about \$1,615 per child (a relatively small average expenditure per person). Similarly, for 13.5 million adults, who comprised 24 percent of beneficiaries, payments averaged about \$2,400 per person. However, certain other specific groups had much larger per-person expenditures. Medicaid payments for services for 4.7 million aged, who constituted 8 percent of all Medicaid beneficiaries, averaged about \$13,295 per person; for 8.8 million disabled, who comprised 16 percent of beneficiaries, payments averaged about \$13,320 per person. When expenditures for these high- and lower-cost beneficiaries are combined, the 2004 payments to health care vendors for 55.6 million Medicaid beneficiaries averaged \$4,640 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 over 41 percent of the total cost of care for persons using nursing facility or home health services in 2004. National data for 2004 show that Medicaid payments for nursing facility services (excluding ICFs/MR) totaled \$42.1 billion for more than 1.7 million beneficiaries of these services—an average expenditure of \$24,475 per nursing home beneficiary. The national data also show that Medicaid payments for home health services totaled \$4.6 billion for more than 1.1 million beneficiaries—an average expenditure of \$3,975 per home health care beneficiary. With the per-

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centage 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 state-wide health care reform experimental demonstrations to cover uninsured populations and to test new delivery systems without increasing costs. Finally, the BBA provided states with 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 65 percent in 2006.

More than 55.6 million persons received health care services through the Medicaid program in fiscal year 2004 (the last year for which beneficiary data are available). In fiscal year 2006, total outlays for the Medicaid program (federal and state) were \$319.6 billion, including direct payment to providers of \$219.2 billion, payments for various premiums (for HMOs, Medicare, etc.) of \$65.9 billion, payments to disproportionate share hospitals of \$13.7 billion, administrative costs of \$19.1 billion, and \$1.8 billion for the Vaccines for Children program. Outlays under the SCHIP program in fiscal year 2006 were \$7.9 billion. With no changes to either program, expenditures under Medicaid and SCHIP are projected to reach \$478.0 billion and \$7.5 billion, respectively, by fiscal year 2012.

## 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, prescription drugs, 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, or 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 the 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. 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 (QDWs).

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 several times. The most recent extension expired at the end of fiscal year 2007.

The Centers for Medicare & Medicaid Services (CMS) estimates that, in 2006, Medicaid provided some level of supplemental health coverage for about 8.0 million Medicare beneficiaries.

Starting January 2006, a new Medicare prescription drug benefit provides drug coverage for Medicare beneficiaries, including those who also receive coverage from



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Medicaid. In addition, individuals eligible for both Medicare and Medicaid receive the 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 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. After 2006, the percentage will decrease by 1 2/3 percent per year to 75 percent for 2014 and later.

Note: Medicaid data are based on the projections of the Mid-Session Review of the President's Fiscal Year 2008 Budget and are consistent with data received from the states on Forms CMS-2082, MSIS, 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 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 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 and financially secure.

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 had been limited to employment covered by the Federal Unemployment Tax Act (FUTA), which relates primarily to industrial and commercial workers in private industry. However, several federal laws added substantially to the number and types of workers protected under the state programs, such as the Employment Security Amendments of 1970 and the Unemployment Compensation Amendments of 1976.

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 were 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 for securing federal approval of the state law. Under this form of coverage, local government and nonprofit employers have the option of making contributions as under FUTA or of reimbursing the state for benefit expenditures actually made. 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.

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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 workers whose employers contribute to or make payments in lieu of contributions to state unemployment funds, federal civilian employees, and ex-servicemembers are eligible if they are involuntarily unemployed, able to work, available for work, and actively seeking work. Workers must also meet the 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.

## 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, normally about 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 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 larger 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.

Thirteen states provide additional allowances for certain dependents. They all include children under the ages of 16, 18, or 19 (and, generally, older if incapacitated); 8 states include a nonworking spouse; and 2 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 14 states require a waiting period of 1 week of total unemployment before benefits can begin. Two states pay benefits retroactively for the waiting period if unemployment lasts a certain period or if the employee returns to work within a specified period.

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

## Extended Benefits

In the 1970s, 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 happens 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

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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 October 23, 2005, Extended Benefits were not payable in any state.

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

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 employ-

ment in underground uranium mines. The lump-sum payments are specified in law and range from \$50,000 to \$100,000.

### Coverage

In 2005, state and federal workers' compensation laws covered about 128.1 million employees. Covered payroll in 2005—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.

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## 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 decreased to \$55.3 billion in 2005, which was a 1.4 percent decrease from the 2004 benefit figure of \$56.1 billion. When compared to covered wages, the benefits fell by seven cents from \$1.13 to \$1.06 per \$100 of covered wages.

In 2005, medical benefits accounted for \$26.2 billion, and wage loss compensation accounted for \$29.1 billion. The latter amount includes payments to disabled workers and the survivors of deceased workers.

The \$55.3 billion for workers' compensation benefit payments in 2005 includes over \$664 million in benefits for the Black Lung program. This program is described separately (see tables 9.D1-9.D2).

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The employers' cost of providing workers' compensation coverage generally varies according to risk, industrial classification, and experience rating. Nationally in 2005, such costs were approximately \$1.70 per \$100 of covered wages, or about \$693 for each of the 128.1 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 system of short-term disability comparable with the federal-state system of unemployment insurance. However, the Federal Unemployment Tax Act (FUTA) was amended in 1946 to permit states where employees made contributions under the unemployment insurance program to use some or all of these contributions for the payment of disability benefits (but not for administration). Three of the nine states that could have benefited by this provision for initial funding for TDI took advantage of it: California, New Jersey, and Rhode Island. The first state law was enacted by Rhode Island in 1942, followed by legislation in California and the railroad industry in 1946, New Jersey in 1948, and New York in 1949. Then came a hiatus of two decades 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-



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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.

Four of the seven TDI programs are administered by the same agency that administers unemployment insurance. Under those five 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. The New York law is administered by the state Workers' Compensation Board, and the Hawaii law is administered separately in the Department of Labor and Industrial Relations.

By way of contrast, 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 with respect to employed workers to exercising general supervision over private plans, to setting standards of performance, and to 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 responsible for the payment and administration of these Part B benefits (miner, survivor, and dependent) with respect to claims filed through June 30, 1973 (and certain survivor cases, before December 31, 1973).

On October 1, 1997, responsibility for maintenance and payment of Part B was transferred from SSA to the Department of Labor (DOL); SSA, however, maintains responsibility for conducting formal hearings necessary to resolve contested issues with respect to Part B claims. Only data on these Part B claims are reported in this *Supplement*. Part C claims are reported in the *OWCP Annual Report to Congress*, U.S. Department of Labor, Office of Workers' Compensation Programs.

Under the Black Lung Benefits Act of 1972, DOL was assigned jurisdiction over Part C benefits, generally claims filed July 1, 1973, and later. Different financing provisions are applicable to these claims.

Legislation enacted on November 2, 2002, (Public Law 107-275) transferred permanently the responsibility for all Black Lung claims (Parts B and C) to the Office of Workers' Compensation Programs (OWCP) of the Department of Labor. The Social Security Administration will only continue to handle a small number of pending Part B appeals cases on a reimbursable basis.

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.

Since Black Lung payments are tied directly to federal employee salary scales, increases are automatically payable when federal salaries are increased. Reflecting a 1.74 percent adjustment, monthly benefit rates effective January 1, 2007, are the following:

- Miner or widow, \$584.00
- Miner or widow and 1 dependent, \$876.00
- Miner or widow and 2 dependents, \$1,022.00
- Miner or widow and 3 or more dependents (family benefit), \$1,168.00

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 non-service-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 2007 range from \$115 a month for a 10 percent disability to \$2,471 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 Non-service-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 years or older who meet service, net worth, and income requirements are eligible for a pension, regardless of current physical condition.

Effective December 1, 2006, maximum benefit amounts for non-service-connected disabilities range from \$911 per month for a veteran without a dependent spouse or child to \$1,801 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 \$156 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 service persons 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 non-service-connected death of a veteran with a service-connected disability requires a marriage of at least a 1-year 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 service person or veteran. In 2007, for pay grades E-1 through E-6, a flat monthly rate of \$1,067 is paid to surviving spouses. Monthly benefits for grades E-7 through E-9 range between \$1,104 and \$1,312. For veterans who died after January 1, 1993, surviving spouses receive a

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flat \$1,067 a month. An additional \$228 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 \$250 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 Non-service-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 non-service-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 2007, pensions range from \$611 a month for a surviving spouse without dependent children to \$1,165 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 \$156 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, or (3) want care for a service-connected disability.

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 a veteran 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, discharged for a disability incurred or aggravated in the line of duty, was awarded VA compensation, or is 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;

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- Provide nursing home care, either directly or through contracts when clinically indicated for eligible veterans;
  - Facilities will 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 Department of Veterans Affairs also pays educational assistance for dependents if a veteran is permanently and totally disabled from a service-related cause, or dies as a result of service, or while completely disabled from service-related causes.

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## **Section 2. History of Program Provisions and SSA Administrative Data**

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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 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, 2006; 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 <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.
1954	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, 2006; 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 <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, 1937–2007**

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	<sup>a</sup> 14,100	<sup>a</sup> 14,100	5.85	4.375	0.575	0.9	7.9	6.185	0.815	0.9	0.9
1976	<sup>a</sup> 15,300	<sup>a</sup> 15,300	5.85	4.375	0.575	0.9	7.9	6.185	0.815	0.9	0.9
1977	<sup>a</sup> 16,500	<sup>a</sup> 16,500	5.85	4.375	0.575	0.9	7.9	6.185	0.815	0.9	0.9
1978	<sup>a</sup> 17,700	<sup>a</sup> 17,700	6.05	4.275	0.775	1.0	8.1	6.01	1.09	1.0	1.0
1979	22,900	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	<sup>a</sup> 32,400	<sup>a</sup> 32,400	6.7	4.575	0.825	1.3	9.35	6.8125	1.2375	1.3	1.3
1983	<sup>a</sup> 35,700	<sup>a</sup> 35,700	6.7	4.775	0.625	1.3	9.35	7.1125	0.9375	1.3	1.3
1984	<sup>a</sup> 37,800	<sup>a</sup> 37,800	<sup>b</sup> 7.0	5.2	0.5	1.3	<sup>b</sup> 14.0	10.4	1.0	2.6	2.6
1985	<sup>a</sup> 39,600	<sup>a</sup> 39,600	7.05	5.2	0.5	1.35	<sup>b</sup> 14.1	10.4	1.0	2.7	2.7
1986	<sup>a</sup> 42,000	<sup>a</sup> 42,000	7.15	5.2	0.5	1.45	<sup>b</sup> 14.3	10.4	1.0	2.9	2.9
1987	<sup>a</sup> 43,800	<sup>a</sup> 43,800	7.15	5.2	0.5	1.45	<sup>b</sup> 14.3	10.4	1.0	2.9	2.9
1988	<sup>a</sup> 45,000	<sup>a</sup> 45,000	7.51	5.53	0.53	1.45	<sup>b</sup> 15.02	11.06	1.06	2.9	2.9
1989	<sup>a</sup> 48,000	<sup>a</sup> 48,000	7.51	5.53	0.53	1.45	<sup>b</sup> 15.02	11.06	1.06	2.9	2.9
1990	<sup>c</sup> 51,300	<sup>c</sup> 51,300	7.65	5.6	0.6	1.45	15.3	11.2	1.2	2.9	2.9
1991	<sup>c</sup> 53,400	<sup>d</sup> 125,000	7.65	5.6	0.6	1.45	15.3	11.2	1.2	2.9	2.9
1992	<sup>c</sup> 55,500	130,200	7.65	5.6	0.6	1.45	15.3	11.2	1.2	2.9	2.9
1993	<sup>a</sup> 57,600	<sup>a</sup> 135,000	7.65	5.6	0.6	1.45	15.3	11.2	1.2	2.9	2.9
1994	<sup>a</sup> 60,600	<sup>e</sup>	7.65	5.26	0.94	1.45	15.3	10.52	1.88	2.9	2.9
1995	<sup>a</sup> 61,200	<sup>e</sup>	7.65	5.26	0.94	1.45	15.3	10.52	1.88	2.9	2.9
1996	<sup>a</sup> 62,700	<sup>e</sup>	7.65	5.26	0.94	1.45	15.3	10.52	1.88	2.9	2.9
1997	<sup>a</sup> 65,400	<sup>e</sup>	7.65	5.35	0.85	1.45	15.3	10.7	1.7	2.9	2.9
1998	<sup>a</sup> 68,400	<sup>e</sup>	7.65	5.35	0.85	1.45	15.3	10.7	1.7	2.9	2.9
1999	<sup>a</sup> 72,600	<sup>e</sup>	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, 1937–2007—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	<sup>a</sup> 76,200	<sup>e</sup>	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2001	<sup>a</sup> 80,400	<sup>e</sup>	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2002	<sup>a</sup> 84,900	<sup>e</sup>	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2003	<sup>a</sup> 87,000	<sup>e</sup>	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2004	<sup>a</sup> 87,900	<sup>e</sup>	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2005	<sup>a</sup> 90,000	<sup>e</sup>	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2006	<sup>a</sup> 94,200	<sup>e</sup>	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2007	<sup>a</sup> 97,500	<sup>e</sup>	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, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

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, 1937–2007 (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 <sup>a</sup>	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

(Continued)

2.A OASDI: Coverage, Financing, and Insured Status

Table 2.A4—Maximum annual amount of contributions, 1937–2007 (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
1985 <sup>a</sup>	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 <sup>a</sup>	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 <sup>a</sup>	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 <sup>a</sup>	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 <sup>a</sup>	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
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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

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, 2006; 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 <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	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. 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. 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. 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.
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, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>.

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Table 2.A7—Insured status (benefit eligibility) provisions, by eligibility concept and year enacted

Year enacted	Provision																																																												
	<i>Quarter of coverage</i>																																																												
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 style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: left;">Year</th> <th style="text-align: left;">Amount (dollars)</th> </tr> </thead> <tbody> <tr><td>1979</td><td>260</td></tr> <tr><td>1980</td><td>290</td></tr> <tr><td>1981</td><td>310</td></tr> <tr><td>1982</td><td>340</td></tr> <tr><td>1983</td><td>370</td></tr> <tr><td>1984</td><td>390</td></tr> <tr><td>1985</td><td>410</td></tr> <tr><td>1986</td><td>440</td></tr> <tr><td>1987</td><td>460</td></tr> <tr><td>1988</td><td>470</td></tr> <tr><td>1989</td><td>500</td></tr> <tr><td>1990</td><td>520</td></tr> <tr><td>1991</td><td>540</td></tr> <tr><td>1992</td><td>570</td></tr> <tr><td>1993</td><td>590</td></tr> <tr><td>1994</td><td>620</td></tr> <tr><td>1995</td><td>630</td></tr> <tr><td>1996</td><td>640</td></tr> <tr><td>1997</td><td>670</td></tr> <tr><td>1998</td><td>700</td></tr> <tr><td>1999</td><td>740</td></tr> <tr><td>2000</td><td>780</td></tr> <tr><td>2001</td><td>830</td></tr> <tr><td>2002</td><td>870</td></tr> <tr><td>2003</td><td>890</td></tr> <tr><td>2004</td><td>900</td></tr> <tr><td>2005</td><td>920</td></tr> <tr><td>2006</td><td>970</td></tr> <tr><td>2007</td><td>1,000</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
Year	Amount (dollars)																																																												
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2004	900																																																												
2005	920																																																												
2006	970																																																												
2007	1,000																																																												
	<i>Disability definition</i>																																																												
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.																																																												
	<i>Period of disability</i>																																																												
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
<b>Fully insured</b>	
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).
<b>Currently insured</b>	
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).
<b>Disability insured</b>	
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.
<b>Transitionally insured</b>	
1965	Same as fully insured, but minimum reduced to 3 QC.
<b>Requirement for special age-72 monthly benefit</b>	
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, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A8—Factors for indexing earnings, 1951–2007

Year	Annual maximum taxable earnings (dollars)	Average annual wage <sup>a</sup> (dollars)	Factors for workers who were first eligible (attained age 62, became disabled, or died) in <sup>b</sup> —							
			1992	1993	1994	1995	1996	1997	1998	1999
1951	3,600	2,799.16	7.5122465	7.7921948	8.1936795	8.2641471	8.4859494	8.8260978	9.2577416	9.7979394
1952	3,600	2,973.32	7.0722223	7.3357728	7.7137409	7.7800809	7.9888912	8.3091157	8.7154763	9.2240324
1953	3,600	3,139.44	6.6980035	6.9476085	7.3055768	7.3684065	7.5661679	7.8694481	8.2543065	8.7359529
1954	3,600	3,155.64	6.6636182	6.9119418	7.2680724	7.3305795	7.5273257	7.8290489	8.2119317	8.6911054
1955	4,200	3,301.44	6.3693358	6.6066928	6.9470958	7.0068425	7.1948998	7.4832982	7.8492718	8.3072841
1956	4,200	3,532.36	5.9529550	6.1747953	6.4929452	6.5487861	6.7245496	6.9940946	7.3361435	7.7642143
1957	4,200	3,641.72	5.7741891	5.9893677	6.2979636	6.3521276	6.5226129	6.7840636	7.1158409	7.5310568
1958	4,200	3,673.80	5.7237683	5.9370679	6.2429691	6.2966601	6.4656568	6.7248244	7.0537046	7.4652948
1959	4,800	3,855.80	5.4535972	5.6568287	5.9482909	5.9994476	6.1604673	6.4074018	6.7207583	7.1129208
1960	4,800	4,007.12	5.2476542	5.4432111	5.7236669	5.7728918	5.9278310	6.1654405	6.4669638	6.8443171
1961	4,800	4,086.76	5.1453915	5.3371375	5.6121279	5.6603936	5.8123134	6.0452926	6.3409400	6.7109397
1962	4,800	4,291.40	4.9000280	5.0826304	5.3445076	5.3904716	5.5351470	5.7570164	6.0385655	6.3909214
1963	4,800	4,396.64	4.7827386	4.9609702	5.2165790	5.2614428	5.4026552	5.6192138	5.8940236	6.2379453
1964	4,800	4,576.32	4.5949540	4.7661877	5.0117605	5.0548629	5.1905308	5.3985866	5.6626066	5.9930250
1965	4,800	4,658.72	4.5136819	4.6818869	4.9231162	4.9654562	5.0987245	5.3031004	5.5624506	5.8870248
1966	6,600	4,938.36	4.2580897	4.4167699	4.6443394	4.6842818	4.8100037	5.0028066	5.2474708	5.5536656
1967	6,600	5,213.44	4.0334175	4.1837251	4.3992872	4.4371221	4.5562105	4.7388404	4.9705952	5.2606341
1968	7,800	5,571.76	3.7740283	3.9146697	4.1163690	4.1517707	4.2632005	4.4340855	4.6509361	4.9223226
1969	7,800	5,893.76	3.5678378	3.7007954	3.8914751	3.9249427	4.0302846	4.1918334	4.3968367	4.6533961
1970	7,800	6,186.24	3.3991536	3.5258251	3.7074895	3.7393748	3.8397363	3.9936472	4.1889581	4.4333876
1971	7,800	6,497.08	3.2365278	3.3571389	3.5301120	3.5604718	3.6560316	3.8025790	3.9885456	4.2212809
1972	9,000	7,133.80	2.9476548	3.0575009	3.2150355	3.2426855	3.3297163	3.4631837	3.6325521	3.8445148
1973	10,800	7,580.16	2.7740813	2.8774591	3.0257171	3.0517390	3.1336449	3.2592531	3.4186482	3.6181294
1974	13,200	8,030.76	2.6184296	2.7160070	2.8559464	2.8805082	2.9578184	3.0763788	3.2268303	3.4151189
1975	14,100	8,630.92	2.4363544	2.5271466	2.6573552	2.6802091	2.7521435	2.8624596	3.0024493	3.1776450
1976	15,300	9,226.48	2.2790902	2.3640218	2.4858256	2.5072043	2.5744954	2.6776907	2.8086443	2.9725312
1977	16,500	9,779.44	2.1502233	2.2303527	2.3452693	2.3654391	2.4289254	2.5262858	2.6498348	2.8044551
1978	17,700	10,556.03	1.9920349	2.0662692	2.1727316	2.1914176	2.2502333	2.3404310	2.4548907	2.5981359
1979	22,900	11,479.46	1.8317917	1.9000545	1.9979529	2.0151357	2.0692202	2.1521622	2.2574145	2.3891368
1980	25,900	12,513.46	1.6804289	1.7430511	1.8328600	1.8486230	1.8982384	1.9743268	2.0708821	2.1917200
1981	29,700	13,773.10	1.5267427	1.5836377	1.6652330	1.6795543	1.7246321	1.7937618	1.8814864	1.9912728
1982	32,400	14,531.34	1.4470778	1.5010040	1.5783417	1.5919158	1.6346414	1.7001639	1.7833111	1.8873690
1983	35,700	15,239.24	1.3798575	1.4312787	1.5050239	1.5179674	1.5587083	1.6211871	1.7004719	1.7996960
1984	37,800	16,135.07	1.3032469	1.3518132	1.4214639	1.4336889	1.4721678	1.5311777	1.6060606	1.6997757
1985	39,600	16,822.51	1.2499906	1.2965723	1.3633768	1.3751022	1.4120087	1.4686072	1.5404301	1.6303156
1986	42,000	17,321.82	1.2139590	1.2591979	1.3240768	1.3354642	1.3713068	1.4262739	1.4960264	1.5833209
1987	43,800	18,426.51	1.1411808	1.1837076	1.2446969	1.2554016	1.2890954	1.3407672	1.4063379	1.4883991
1988	45,000	19,334.04	1.0876144	1.1281450	1.1862715	1.1964737	1.2285860	1.2778323	1.3403251	1.4185344
1989	48,000	20,099.55	1.0461916	1.0851785	1.1410912	1.1509049	1.1817941	1.2291648	1.2892776	1.3645082
1990	51,300	21,027.98	1.0000000	1.0372656	1.0907096	1.1000900	1.1296154	1.1748946	1.2323533	1.3042622
1991	53,400	21,811.60	1.0000000	1.0000000	1.0515240	1.0605673	1.0890320	1.1326844	1.1880788	1.2574043
1992	55,500	22,935.42	1.0000000	1.0000000	1.0000000	1.0086002	1.0356702	1.0771837	1.1298638	1.1957924
1993	57,600	23,132.67	1.0000000	1.0000000	1.0000000	1.0000000	1.0268391	1.0679986	1.1202295	1.1855960
1994	60,600	23,753.53	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0400837	1.0909494	1.1546073
1995	61,200	24,705.66	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0489054	1.1101100
1996	62,700	25,913.90	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0583509
1997	65,400	27,426.00	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1998	68,400	28,861.44	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1999	72,600	30,469.84	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
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	--	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2007	97,500	--	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000

## 2.A OASDI: Benefit Computation and Automatic Adjustments

**Table 2.A8—Factors for indexing earnings, 1951–2007—Continued**

Year	Annual maximum taxable earnings (dollars)	Average annual wage <sup>a</sup> (dollars)	Factors for workers who were first eligible (attained age 62, became disabled, or died) in <sup>b</sup> —							
			2000	2001	2002	2003	2004	2005	2006	2007
1951	3,600	2,799.16	10.3107504	10.8853513	11.4873105	11.7613570	11.8793102	12.1697045	12.7354456	13.2014390
1952	3,600	2,973.32	9.7068059	10.2477500	10.8144498	11.0724443	11.1834885	11.4568731	11.9894764	12.4281746
1953	3,600	3,139.44	9.1931809	9.7055016	10.2422152	10.4865581	10.5917265	10.8506453	11.3550665	11.7705514
1954	3,600	3,155.64	9.1459862	9.6556768	10.1896351	10.4327236	10.5373522	10.7949418	11.2967734	11.7101254
1955	4,200	3,301.44	8.7420762	9.2292575	9.7396348	9.9719880	10.0719959	10.3182096	10.7978791	11.1929764
1956	4,200	3,532.36	8.1705828	8.6259158	9.1029284	9.3200919	9.4135620	9.6436801	10.0919923	10.4612610
1957	4,200	3,641.72	7.9252221	8.3668816	8.8295695	9.0402118	9.1308750	9.3540827	9.7889322	10.1471118
1958	4,200	3,673.80	7.8560183	8.2938211	8.7524688	8.9612717	9.0511432	9.2724019	9.7034542	10.0585062
1959	4,800	3,855.80	7.4852015	7.9023393	8.3393381	8.5382852	8.6239146	8.8347295	9.2454354	9.5837284
1960	4,800	4,007.12	7.2025395	7.6039250	8.0244215	8.2158558	8.2982516	8.5011055	8.8963021	9.2218202
1961	4,800	4,086.76	7.0621813	7.4557449	7.8680471	8.0557508	8.1365409	8.3354418	8.7229370	9.0421116
1962	4,800	4,291.40	6.7254136	7.1002097	7.4928508	7.6716037	7.7485413	7.9379573	8.3069744	8.6109288
1963	4,800	4,396.64	6.5644310	6.9302558	7.3134985	7.4879726	7.5630686	7.7479507	8.1081348	8.4048137
1964	4,800	4,576.32	6.3066918	6.6581533	7.0263487	7.1939724	7.2661199	7.4437430	7.7897852	8.0748156
1965	4,800	4,658.72	6.1951437	6.5403888	6.9020718	7.0667308	7.1376022	7.3120836	7.6520053	7.9319942
1966	6,600	4,938.36	5.8443370	6.1700322	6.5112345	6.6665695	6.7334277	6.8980289	7.2187022	7.4828364
1967	6,600	5,213.44	5.5359686	5.8444789	6.1676782	6.3148171	6.3781476	6.5340639	6.8378173	7.0880148
1968	7,800	5,571.76	5.1799503	5.4686203	5.7710346	5.9087111	5.9679688	6.1138581	6.3980771	6.6321844
1969	7,800	5,893.76	4.8969486	5.1698474	5.4557396	5.5858942	5.6419145	5.7798332	6.0485242	6.2698413
1970	7,800	6,186.24	4.6654252	4.9254216	5.1977970	5.3217981	5.3751697	5.5065678	5.7625553	5.9734087
1971	7,800	6,497.08	4.4422171	4.6897745	4.9491187	5.0671871	5.1180053	5.2431169	5.4868572	5.6876227
1972	9,000	7,133.80	4.0457316	4.2711935	4.5073902	4.6149205	4.6612030	4.7751479	4.9971334	5.1799798
1973	10,800	7,580.16	3.8074975	4.0196830	4.2419711	4.3431695	4.3867267	4.4939619	4.7028757	4.8749551
1974	13,200	8,030.76	3.5938616	3.7941415	4.0039573	4.0994775	4.1405907	4.2418090	4.4390008	4.6014250
1975	14,100	8,630.92	3.3439587	3.5303119	3.7255379	3.8144161	3.8526704	3.9468504	4.1303303	4.2814601
1976	15,300	9,226.48	3.1281095	3.3024339	3.4850582	3.5681994	3.6039844	3.6920852	3.8637216	4.0050962
1977	16,500	9,779.44	2.9512365	3.1157040	3.2880022	3.3664423	3.4002039	3.4833232	3.6452547	3.7786356
1978	17,700	10,556.03	2.7341188	2.8864867	3.0461092	3.1187786	3.1500564	3.2270607	3.3770793	3.5006475
1979	22,900	11,479.46	2.5141810	2.6542921	2.8010743	2.8678980	2.8966598	2.9674697	3.1054205	3.2190486
1980	25,900	12,513.46	2.3064316	2.4349652	2.5696186	2.6309206	2.6573058	2.7222647	2.8488164	2.9530554
1981	29,700	13,773.10	2.0954934	2.2122717	2.3346102	2.3903057	2.4142778	2.4732958	2.5882735	2.6829791
1982	32,400	14,531.34	1.9861513	2.0968362	2.2127911	2.2655805	2.2883017	2.3442401	2.4532184	2.5429823
1983	35,700	15,239.24	1.8938897	1.9994330	2.1100015	2.1603387	2.1820045	2.2353444	2.3392604	2.4248545
1984	37,800	16,135.07	1.7887397	1.8884232	1.9928528	2.0403952	2.0608581	2.1112366	2.2093830	2.2902250
1985	39,600	16,822.51	1.7156441	1.8112541	1.9114163	1.9570159	1.9766426	2.0249624	2.1190982	2.1966365
1986	42,000	17,321.82	1.6661898	1.7590438	1.8563188	1.9006040	1.9196649	1.9665918	2.0580141	2.1333174
1987	43,800	18,426.51	1.5662999	1.6535871	1.7450304	1.7866606	1.8045788	1.8486925	1.9346339	2.0054226
1988	45,000	19,334.04	1.4927785	1.5759686	1.6631196	1.7027957	1.7198728	1.7619158	1.8438231	1.9112891
1989	48,000	20,099.55	1.4359247	1.5159464	1.5997781	1.6379431	1.6543699	1.6948116	1.7735994	1.8384959
1990	51,300	21,027.98	1.3725256	1.4490141	1.5291445	1.5656245	1.5813259	1.6199820	1.6952912	1.7573224
1991	53,400	21,811.60	1.3232152	1.3969557	1.4742073	1.5093767	1.5245140	1.5617813	1.6343849	1.6941875
1992	55,500	22,935.42	1.2583785	1.3285059	1.4019721	1.4354182	1.4498139	1.4852551	1.5543012	1.6111735
1993	57,600	23,132.67	1.2476485	1.3171778	1.3900177	1.4231786	1.4374514	1.4725905	1.5410478	1.5974351
1994	60,600	23,753.53	1.2150379	1.2827500	1.3536860	1.3859801	1.3998799	1.4341005	1.5007685	1.5556820
1995	61,200	24,705.66	1.1682117	1.2333141	1.3015163	1.3325659	1.3459300	1.3788318	1.4429305	1.4957277
1996	62,700	25,913.90	1.1137436	1.1758107	1.2408329	1.2704348	1.2831758	1.3145435	1.3756536	1.4259891
1997	65,400	27,426.00	1.0523387	1.1109837	1.1724211	1.2003909	1.2124294	1.2420677	1.2998086	1.3473689
1998	68,400	28,861.44	1.0000000	1.0557283	1.1141100	1.1406888	1.1521286	1.1802928	1.2351619	1.2803568
1999	72,600	30,469.84	1.0000000	1.0000000	1.0552999	1.0804756	1.0913116	1.1179891	1.1699618	1.2127711

(Continued)

## 2.A OASDI: Benefit Computation and Automatic Adjustments

**Table 2.A8—Factors for indexing earnings, 1951–2007—Continued**

Year	Annual maximum taxable earnings (dollars)	Average annual wage <sup>a</sup> (dollars)	Factors for workers who were first eligible (attained age 62, became disabled, or died) in <sup>b</sup> —							
			2000	2001	2002	2003	2004	2005	2006	2007
2000	76,200	32,154.82	1.0000000	1.0000000	1.0000000	1.0238565	1.0341246	1.0594042	1.1086534	1.1492193
2001	80,400	32,921.92	1.0000000	1.0000000	1.0000000	1.0000000	1.0100289	1.0347194	1.0828211	1.1224418
2002	84,900	33,252.09	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0244454	1.0720695	1.1112968
2003	87,000	34,064.95	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0464877	1.0847789
2004	87,900	35,648.55	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0365903
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	--	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2007	97,500	--	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, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

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, 1951–2007 (in dollars)**

Year	Annual maximum taxable earnings	Average annual wage <sup>a</sup>	Annual maximum indexed earnings for workers who were first eligible (attained age 62, became disabled, or died) in <sup>b</sup> —							
			2000	2001	2002	2003	2004	2005	2006	2007
1951	3,600	2,799.16	37,118.70	39,187.26	41,354.32	42,340.89	42,765.52	43,810.94	45,847.60	47,525.18
1952	3,600	2,973.32	34,944.50	36,891.90	38,932.02	39,860.80	40,260.56	41,244.74	43,162.12	44,741.43
1953	3,600	3,139.44	33,095.45	34,939.81	36,871.97	37,751.61	38,130.22	39,062.32	40,878.24	42,373.99
1954	3,600	3,155.64	32,925.55	34,760.44	36,682.69	37,557.81	37,934.47	38,861.79	40,668.38	42,156.45
1955	4,200	3,301.44	36,716.72	38,762.88	40,906.47	41,882.35	42,302.38	43,336.48	45,351.09	47,010.50
1956	4,200	3,532.36	34,316.45	36,228.85	38,232.30	39,144.39	39,536.96	40,503.46	42,386.37	43,937.30
1957	4,200	3,641.72	33,285.93	35,140.90	37,084.19	37,968.89	38,349.67	39,287.15	41,113.52	42,617.87
1958	4,200	3,673.80	32,995.28	34,834.05	36,760.37	37,637.34	38,014.80	38,944.09	40,754.51	42,245.73
1959	4,800	3,855.80	35,928.97	37,931.23	40,028.82	40,983.77	41,394.79	42,406.70	44,378.09	46,001.90
1960	4,800	4,007.12	34,572.19	36,498.84	38,517.22	39,436.11	39,831.61	40,805.31	42,702.25	44,264.74
1961	4,800	4,086.76	33,898.47	35,787.58	37,766.63	38,667.60	39,055.40	40,010.12	41,870.10	43,402.14
1962	4,800	4,291.40	32,281.99	34,081.01	35,965.68	36,823.70	37,193.00	38,102.20	39,873.48	41,332.46
1963	4,800	4,396.64	31,509.27	33,265.23	35,104.79	35,942.27	36,302.73	37,190.16	38,919.05	40,343.11
1964	4,800	4,576.32	30,272.12	31,959.14	33,726.47	34,531.07	34,877.38	35,729.97	37,390.97	38,759.11
1965	4,800	4,658.72	29,736.69	31,393.87	33,129.94	33,920.31	34,260.49	35,098.00	36,729.63	38,073.57
1966	6,600	4,938.36	38,572.62	40,722.21	42,974.15	43,999.36	44,440.62	45,526.99	47,643.43	49,386.72
1967	6,600	5,213.44	36,537.39	38,573.56	40,706.68	41,677.79	42,095.77	43,124.82	45,129.59	46,780.90
1968	7,800	5,571.76	40,403.61	42,655.24	45,014.07	46,087.95	46,550.16	47,688.09	49,905.00	51,731.04
1969	7,800	5,893.76	38,196.20	40,324.81	42,554.77	43,569.98	44,006.93	45,082.70	47,178.49	48,904.76
1970	7,800	6,186.24	36,390.32	38,418.29	40,542.82	41,510.02	41,926.32	42,951.23	44,947.93	46,592.59
1971	7,800	6,497.08	34,649.29	36,580.24	38,603.13	39,524.06	39,920.44	40,896.31	42,797.49	44,363.46
1972	9,000	7,133.80	36,411.58	38,440.74	40,566.51	41,534.28	41,950.83	42,976.33	44,974.20	46,619.82
1973	10,800	7,580.16	41,120.97	43,412.58	45,813.29	46,906.23	47,376.65	48,534.79	50,791.06	52,649.52
1974	13,200	8,030.76	47,438.97	50,082.67	52,852.24	54,113.10	54,655.80	55,991.88	58,594.81	60,738.81
1975	14,100	8,630.92	47,149.82	49,777.40	52,530.09	53,783.27	54,322.65	55,650.59	58,237.66	60,368.59
1976	15,300	9,226.48	47,860.08	50,527.24	53,321.39	54,593.45	55,140.96	56,488.90	59,114.94	61,277.97
1977	16,500	9,779.44	48,695.40	51,409.12	54,252.04	55,546.30	56,103.36	57,474.83	60,146.70	62,347.49
1978	17,700	10,556.03	48,393.90	51,090.81	53,916.13	55,202.38	55,756.00	57,118.98	59,774.30	61,961.46
1979	22,900	11,479.46	57,574.74	60,783.29	64,144.60	65,674.86	66,333.51	67,955.06	71,114.13	73,716.21
1980	25,900	12,513.46	59,736.58	63,065.60	66,553.12	68,140.84	68,824.22	70,506.65	73,784.34	76,484.13
1981	29,700	13,773.10	62,236.15	65,704.47	69,337.92	70,992.08	71,704.05	73,456.88	76,871.72	79,684.48
1982	32,400	14,531.34	64,351.30	67,937.49	71,694.43	73,404.81	74,140.98	75,953.38	79,484.27	82,392.63
1983	35,700	15,239.24	67,611.86	71,379.76	75,327.06	77,124.09	77,897.56	79,801.80	83,511.59	86,567.31
1984	37,800	16,135.07	67,614.36	71,382.40	75,329.84	77,126.94	77,900.44	79,804.74	83,514.68	86,570.50
1985	39,600	16,822.51	67,939.51	71,725.66	75,692.09	77,497.83	78,275.05	80,188.51	83,916.29	86,986.81
1986	42,000	17,321.82	69,979.97	73,879.84	77,965.39	79,825.37	80,625.93	82,596.86	86,436.59	89,599.33
1987	43,800	18,426.51	68,603.93	72,427.12	76,432.33	78,255.74	79,040.55	80,972.73	84,736.96	87,837.51
1988	45,000	19,334.04	67,175.03	70,918.59	74,840.38	76,625.81	77,394.28	79,286.21	82,972.04	86,008.01
1989	48,000	20,099.55	68,924.38	72,765.43	76,789.35	78,621.27	79,409.75	81,350.96	85,132.77	88,247.80
1990	51,300	21,027.98	70,410.56	74,334.42	78,445.11	80,316.54	81,122.02	83,105.08	86,968.44	90,150.64
1991	53,400	21,811.60	70,659.69	74,597.44	78,722.67	80,600.71	81,409.05	83,399.12	87,276.15	90,469.61
1992	55,500	22,935.42	69,840.01	73,732.08	77,809.45	79,665.71	80,464.67	82,431.66	86,263.71	89,420.13
1993	57,600	23,132.67	71,864.55	75,869.44	80,065.02	81,975.09	82,797.20	84,821.21	88,764.35	92,012.26
1994	60,600	23,753.53	73,631.30	77,734.65	82,033.37	83,990.39	84,832.72	86,906.49	90,946.57	94,274.33
1995	61,200	24,705.66	71,494.55	75,478.83	79,652.80	81,553.03	82,370.92	84,384.51	88,307.35	91,538.54
1996	62,700	25,913.90	69,831.72	73,723.33	77,800.22	79,656.26	80,455.12	82,421.88	86,253.48	89,409.52
1997	65,400	27,426.00	68,822.95	72,658.34	76,676.34	78,505.56	79,292.89	81,231.23	85,007.48	88,117.93
1998	68,400	28,861.44	68,400.00	72,211.82	76,205.13	78,023.11	78,805.60	80,732.03	84,485.07	87,576.40
1999	72,600	30,469.84	72,600.00	72,600.00	76,614.77	78,442.53	79,229.22	81,166.01	84,939.23	88,047.18

(Continued)

## 2.A OASDI: Benefit Computation and Automatic Adjustments

**Table 2.A9—Indexed earnings for workers with maximum earnings, 1951–2007 (in dollars)—Continued**

Year	Annual maximum taxable earnings	Average annual wage <sup>a</sup>	Annual maximum indexed earnings for workers who were first eligible (attained age 62, became disabled, or died) in <sup>b</sup> —							
			2000	2001	2002	2003	2004	2005	2006	2007
2000	76,200	32,154.82	76,200.00	76,200.00	76,200.00	78,017.86	78,800.29	80,726.60	84,479.39	87,570.51
2001	80,400	32,921.92	80,400.00	80,400.00	80,400.00	80,400.00	81,206.32	83,191.44	87,058.82	90,244.32
2002	84,900	33,252.09	84,900.00	84,900.00	84,900.00	84,900.00	84,900.00	86,975.41	91,018.70	94,349.10
2003	87,000	34,064.95	87,000.00	87,000.00	87,000.00	87,000.00	87,000.00	87,000.00	91,044.43	94,375.77
2004	87,900	35,648.55	87,900.00	87,900.00	87,900.00	87,900.00	87,900.00	87,900.00	87,900.00	91,116.28
2005	90,000	36,952.94	90,000.00	90,000.00	90,000.00	90,000.00	90,000.00	90,000.00	90,000.00	94,200.00
2006	94,200	--	94,200.00	94,200.00	94,200.00	94,200.00	94,200.00	94,200.00	94,200.00	97,500.00
2007	97,500	--	97,500.00	97,500.00	97,500.00	97,500.00	97,500.00	97,500.00	97,500.00	97,500.00

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

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 2000, the indexing factor for 1982 is \$28,861.44/14,531.34, or 1.9861513. Multiplication of maximum taxable earnings of \$32,400 for 1982 by this factor gives maximum indexed earnings of \$64,351.30 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
<b>Average monthly wage (AMW)</b>	
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.
<b>Average indexed monthly earnings (AIME)</b>	
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, 2006; 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 <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) <sup>a</sup> (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<sup>b</sup></i>						
1979	180	905	1,085	June 1979	9.9	<sup>c</sup> 122
1980	194	977	1,171	June 1980	14.3	<sup>c</sup> 122
<i>Enacted in 1981</i>						
1981	211	1,063	1,274	June 1981	11.2	<sup>c</sup> 122
1982	230	1,158	1,388	June 1982	7.4	<sup>d</sup>
<i>Enacted in 1983</i>						
1983	254	1,274	1,528	December 1983	3.5	<sup>d</sup>
1984	267	1,345	1,612	December 1984	3.5	<sup>d</sup>
1985	280	1,411	1,691	December 1985	3.1	<sup>d</sup>
1986	297	1,493	1,790	December 1986	1.3	<sup>d</sup>
1987	310	1,556	1,866	December 1987	4.2	<sup>d</sup>
1988	319	1,603	1,922	December 1988	4.0	<sup>d</sup>
1989	339	1,705	2,044	December 1989	4.7	<sup>d</sup>
1990	356	1,789	2,145	December 1990	5.4	<sup>d</sup>
1991	370	1,860	2,230	December 1991	3.7	<sup>d</sup>
1992	387	1,946	2,333	December 1992	3.0	<sup>d</sup>
1993	401	2,019	2,420	December 1993	2.6	<sup>d</sup>
1994	422	2,123	2,545	December 1994	2.8	<sup>d</sup>
1995	426	2,141	2,567	December 1995	2.6	<sup>d</sup>
1996	437	2,198	2,635	December 1996	2.9	<sup>d</sup>
1997	455	2,286	2,741	December 1997	2.1	<sup>d</sup>
1998	477	2,398	2,875	December 1998	1.3	<sup>d</sup>
1999	505	2,538	3,043	December 1999	<sup>e</sup> 2.5	<sup>d</sup>
2000	531	2,671	3,202	December 2000	3.5	<sup>d</sup>

(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) <sup>a</sup> (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	--	d

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

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.

- a. 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.
- b. 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.
- c. Not subject to automatic adjustments until earlier of year of attainment of age 65 or year of first receipt of benefits.
- d. 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.
- e. 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.

## 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. <sup>a</sup> The benefit computation formula uses a reduced factor of the usual first AIME bend point.																				
	<table style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: left;"><i>Year eligible</i></th> <th style="text-align: left;"><i>Factor (percent)</i></th> </tr> </thead> <tbody> <tr><td>1986</td><td>80</td></tr> <tr><td>1987</td><td>70</td></tr> <tr><td>1988</td><td>60</td></tr> <tr><td>1989</td><td>50</td></tr> <tr><td>1990 and later</td><td>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. <sup>b</sup> For benefits payable before January 1989:																				
	<table style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: left;"><i>Years of coverage</i></th> <th style="text-align: left;"><i>Factor (percent)</i></th> </tr> </thead> <tbody> <tr><td>26</td><td>50</td></tr> <tr><td>27</td><td>60</td></tr> <tr><td>28</td><td>70</td></tr> <tr><td>29</td><td>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="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: left;"><i>Years of coverage</i></th> <th style="text-align: left;"><i>Factor (percent)</i></th> </tr> </thead> <tbody> <tr><td>21</td><td>45</td></tr> <tr><td>22</td><td>50</td></tr> <tr><td>23</td><td>55</td></tr> <tr><td>24</td><td>60</td></tr> <tr><td>25</td><td>65</td></tr> <tr><td>26</td><td>70</td></tr> <tr><td>27</td><td>75</td></tr> <tr><td>28</td><td>80</td></tr> <tr><td>29</td><td>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). <sup>b</sup>
	<i>Earnings (dollars)</i>
	Year
	1991
	1992
	1993
	1994
	1995
	1996
	1997
	1998
	1999
	2000
	2001
	2002
	2003
	2004
	2005
	2006
	2007

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

- 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.

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 <sup>a</sup> 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 <sup>a</sup> 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 <sup>a</sup> for workers with 30 or more years of coverage (dollars)
			Effective date	Amount <sup>a</sup> per year of coverage over 10 years (dollars)	
			March 1974	9.00	180.00
1977 <sup>b</sup>	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 <sup>a</sup> per year of coverage over 10 years (dollars)	Maximum amount <sup>a</sup> for workers with 30 or more years of coverage (dollars)
	Year	Amount (dollars)	January 1979	11.50	230.00
	1979	4,725	June 1979	<sup>c</sup> 12.64	252.80
	1980	5,100	June 1980	<sup>c</sup> 14.45	289.00
	1981	5,500	June 1981	<sup>c</sup> 16.07	321.40
	1982	6,075	June 1982	<sup>c</sup> 17.26	345.10
	1983	6,675	December 1983	<sup>c</sup> 17.86	357.10
	1984	7,050	December 1984	<sup>c</sup> 18.49	369.50
	1985	7,425	December 1985	<sup>c</sup> 19.06	380.90
	1986	7,875	December 1986	<sup>c</sup> 19.31	385.80
	1987	8,175	December 1987	<sup>c</sup> 20.12	402.00
	1988	8,400	December 1988	<sup>c</sup> 20.92	418.00
	1989	8,925	December 1989	<sup>c</sup> 21.90	437.60
	1990	9,525	December 1990	<sup>c</sup> 23.08	461.20
			December 1991	<sup>c</sup> 23.93	478.20
			December 1992	<sup>c</sup> 24.65	492.50
			December 1993	<sup>c</sup> 25.29	505.30
			December 1994	<sup>c</sup> 26.00	519.40
			December 1995	<sup>c</sup> 26.68	532.90
			December 1996	<sup>c</sup> 27.45	548.30
			December 1997	<sup>c</sup> 28.03	559.80
			December 1998	<sup>c</sup> 28.39	567.00
			December 1999	<sup>c,d</sup> 29.10	<sup>d</sup> 581.10
			December 2000	<sup>c</sup> 30.12	601.40
			December 2001	<sup>c</sup> 30.90	617.00
			December 2002	<sup>c</sup> 31.33	625.60
			December 2003	<sup>c</sup> 31.99	638.70
			December 2004	<sup>c</sup> 32.85	655.90
			December 2005	<sup>c</sup> 34.20	682.70
			December 2006	<sup>c</sup> 35.33	705.20

(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
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: <sup>e</sup>	...
	<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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

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*.
- 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.

## 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	<sup>a</sup> 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	--

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

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.

## 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<sup>a</sup></i>	
1979 <sup>b</sup>	150% of first \$230 of PIA + 272% of next \$102 of PIA + 134% of next \$101 of PIA + 175% of PIA over \$433 <sup>c</sup>
1980 <sup>b</sup>	150% of first \$248 of PIA + 272% of next \$110 of PIA + 134% of next \$109 of PIA + 175% of PIA over \$467 <sup>c</sup>
<i>Enacted in 1980<sup>d</sup></i>	
1979 or later	Smaller of (1) 85% of the AIME (or 100% of PIA, if larger) and (2) 150% of PIA <sup>e</sup>

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

- 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).

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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
First 110	<sup>a</sup> 50.00	<sup>a</sup> 55.00	55.00	58.85	62.97	71.16	81.83	90.01	108.01	119.89
Next 290	<sup>b</sup> 15.00	<sup>b</sup> 15.00	<sup>c</sup> 20.00	21.40	22.90	25.88	29.76	32.74	39.29	43.61
Next 150	...	...	...	...	21.40	24.18	27.81	30.59	36.71	40.75
Next 100	...	...	...	...	...	28.43	32.69	35.96	43.15	47.90
Next 100	...	...	...	...	...	...	...	20.00	24.00	26.64
Next 250	...	...	...	...	...	...	...	...	<sup>d</sup> 20.00	22.20
Next 175	...	...	...	...	...	...	...	...	...	<sup>e</sup> 20.00
Percentage increase in PIA	<sup>f</sup> 77.0	<sup>g</sup> 12.5	<sup>h</sup> 13.0	<sup>i</sup> 7.0	<sup>j</sup> 7.0	13.0	15.0	10.0	20.0	<sup>k</sup> 11.0

(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 1975	June 1976	June 1977	June 1978	June 1979	June 1980	June 1981	June 1982	Dec. 1983	Dec. 1984
First 110	129.48	137.77	145.90	155.38	170.76	195.18	217.04	233.10	241.26	249.70
Next 290	47.10	50.10	53.06	56.51	62.10	70.98	78.93	84.77	87.74	90.81
Next 150	44.01	46.82	49.58	52.81	58.04	66.34	73.77	79.23	82.00	84.87
Next 100	51.73	55.05	58.30	62.09	68.24	78.00	86.74	93.16	96.42	99.79
Next 100	28.77	30.61	32.42	34.53	37.95	43.38	48.24	51.81	53.62	55.50
Next 250	23.98	25.51	27.02	28.78	31.63	36.15	40.20	43.17	44.68	46.24
Next 175	21.60	22.98	24.34	25.92	28.49	32.56	36.21	38.89	40.25	41.66
Next 100	20.00	21.28	22.54	24.01	26.39	30.16	33.54	36.02	37.28	38.58
Next 100	...	20.00	21.18	22.56	24.79	28.33	31.50	33.83	35.01	36.24
Next 100	...	...	20.00	21.30	23.41	26.76	29.76	31.96	33.08	34.24
Next 435	...	...	...	20.00	21.98	25.12	27.93	30.00	31.05	32.14
Next 250	...	...	...	...	20.00	22.86	25.42	27.30	28.26	29.25
Next 315	...	...	...	...	...	20.00	22.24	23.89	24.73	25.60
Next 225	...	...	...	...	...	...	20.00	21.48	22.23	23.01
Next 275	...	...	...	...	...	...	...	20.00	20.70	21.42
Next 175	...	...	...	...	...	...	...	...	20.00	20.70
Next 150	...	...	...	...	...	...	...	...	...	20.00
Percentage increase in PIA	<sup>l</sup> 8.0	6.4	5.9	6.5	9.9	14.3	11.2	7.4	3.5	3.5

(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. 1985	Dec. 1986	Dec. 1987	Dec. 1988	Dec. 1989	Dec. 1990	Dec. 1991	Dec. 1992	Dec. 1993	Dec. 1994
First 110	257.44	260.79	271.74	282.61	295.89	311.87	323.41	333.11	341.77	351.34
Next 290	93.62	94.84	98.82	102.77	107.60	113.42	117.62	121.15	124.30	127.78
Next 150	87.50	88.64	92.36	96.05	100.56	105.99	109.91	113.21	116.15	119.40
Next 100	102.88	104.22	108.60	112.94	118.25	124.64	129.25	133.13	136.59	140.41
Next 100	57.22	57.96	60.39	62.81	65.76	69.31	71.87	74.03	75.95	78.08
Next 250	47.67	48.29	50.32	52.33	54.79	57.75	59.89	61.69	63.29	65.06
Next 175	42.95	43.51	45.34	47.15	49.37	52.04	53.97	55.59	57.04	58.64
Next 100	39.78	40.30	41.99	43.67	45.72	48.19	49.97	51.47	52.81	54.29
Next 100	37.36	37.85	39.44	41.02	42.95	45.27	46.94	48.35	49.61	51.00
Next 100	35.30	35.76	37.26	38.75	40.57	42.76	44.34	45.67	46.86	48.17
Next 435	33.14	33.57	34.98	36.38	38.09	40.15	41.64	42.89	44.01	45.24
Next 250	30.16	30.55	31.83	33.10	34.66	36.53	37.88	39.02	40.03	41.15
Next 315	26.39	26.73	27.85	28.96	30.32	31.96	33.14	34.13	35.02	36.00
Next 225	23.72	24.03	25.04	26.04	27.26	28.73	29.79	30.68	31.48	32.36
Next 275	22.08	22.37	23.31	24.24	25.38	26.75	27.74	28.57	29.31	30.13
Next 175	21.34	21.62	22.53	23.43	24.53	25.85	26.81	27.61	28.33	29.12
Next 150	20.63	20.90	21.78	22.65	23.71	24.99	25.91	26.69	27.38	28.15
Next 200	20.00	20.26	21.11	21.95	22.98	24.22	25.12	25.87	26.54	27.28
Next 150	...	20.00	20.84	21.67	22.69	23.92	24.81	25.55	26.21	26.94
Next 100	...	...	20.00	20.80	21.78	22.96	23.81	24.52	25.16	25.86
Next 250	...	...	...	20.00	20.94	22.07	22.89	23.58	24.19	24.87
Next 275	...	...	...	...	20.00	21.08	21.86	22.52	23.11	23.76
Next 175	...	...	...	...	...	20.00	20.74	21.36	21.92	22.53
Next 175	...	...	...	...	...	...	20.00	20.60	21.14	21.73
Next 175	...	...	...	...	...	...	...	20.00	20.52	21.73
Next 250	...	...	...	...	...	...	...	...	20.00	21.09
Next 50	...	...	...	...	...	...	...	...	...	20.56
Percentage increase in PIA	3.1	1.3	4.2	4.0	4.7	5.4	3.7	3.0	2.6	2.8

(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. 1995	Dec. 1996	Dec. 1997	Dec. 1998	Dec. 1999	Dec. 2000	Dec. 2001	Dec. 2002	Dec. 2003	Dec. 2004	Dec. 2005	Dec. 2006
First 110	360.47	370.93	378.72	383.64	393.23	407.00	417.58	423.43	432.32	443.99	462.19	477.45
Next 290	131.10	134.90	137.73	139.52	143.01	148.02	151.87	153.99	157.23	161.47	168.09	173.64
Next 150	122.50	126.06	128.71	130.38	133.64	138.32	141.91	143.90	146.92	150.89	157.08	162.26
Next 100	144.06	148.24	151.35	153.32	157.15	162.65	166.88	169.22	172.77	177.44	184.71	190.81
Next 100	80.11	82.43	84.16	85.26	87.39	90.45	92.80	94.10	96.07	98.67	102.71	106.10
Next 250	66.75	68.69	70.13	71.04	72.82	75.37	77.33	78.41	80.06	82.22	85.59	88.41
Next 175	60.16	61.91	63.21	64.03	65.63	67.93	69.70	70.67	72.16	74.10	77.14	79.69
Next 100	55.70	57.32	58.52	59.28	60.77	62.89	64.53	65.43	66.81	68.61	71.42	73.78
Next 100	52.33	53.84	54.97	55.69	57.08	59.08	60.61	61.46	62.75	64.44	67.09	69.30
Next 100	49.42	50.86	51.93	52.60	53.92	55.81	57.26	58.06	59.28	60.88	63.37	65.46
Next 435	46.42	47.76	48.76	49.40	50.63	52.40	53.77	54.52	55.66	57.17	59.51	61.47
Next 250	42.22	43.44	44.35	44.93	46.05	47.66	48.90	49.59	50.63	52.00	54.13	55.91
Next 315	36.94	38.01	38.81	39.31	40.30	41.71	42.79	43.39	44.30	45.50	47.36	48.92
Next 225	33.20	34.16	34.88	35.33	36.21	37.48	38.46	38.99	39.81	40.89	42.56	43.97
Next 275	30.91	31.81	32.48	32.90	33.72	34.90	35.81	36.31	37.07	38.08	39.64	40.94
Next 175	29.88	30.74	31.39	31.79	32.59	33.73	34.61	35.09	35.83	36.79	38.30	39.57
Next 150	28.88	29.72	30.34	30.74	31.51	32.61	33.46	33.93	34.64	35.57	37.03	38.25
Next 200	27.99	28.80	29.40	29.79	30.53	31.60	32.42	32.88	33.57	34.47	35.89	37.07
Next 150	27.64	28.44	29.04	29.41	30.15	31.21	32.02	32.46	33.15	34.04	35.44	36.61
Next 100	26.53	27.30	27.87	28.24	28.94	29.95	30.73	31.16	31.82	32.68	34.02	35.14
Next 250	25.52	26.26	26.81	27.16	27.84	28.81	29.56	29.98	30.61	31.43	32.72	33.80
Next 275	24.38	25.08	25.61	25.94	26.59	27.52	28.23	28.63	29.23	30.02	31.25	32.28
Next 175	23.12	23.79	24.29	24.61	25.22	26.10	26.78	27.16	27.73	28.48	29.64	30.62
Next 175	22.29	22.94	23.42	23.73	24.32	25.17	25.82	26.19	26.74	27.46	28.58	29.53
Next 175	21.64	22.27	22.74	23.03	23.61	24.44	25.07	25.42	25.96	26.66	27.75	28.67
Next 250	21.09	21.71	22.17	22.45	23.02	23.82	24.44	24.78	25.30	25.99	27.05	27.94
Next 50	20.52	21.12	21.56	21.84	22.39	23.17	23.78	24.11	24.62	25.28	26.32	27.18
Next 125	20.00	20.58	21.01	21.29	21.82	22.58	23.17	23.49	23.99	24.63	25.64	26.49
Next 225	...	20.00	20.42	20.69	21.20	21.94	22.52	22.83	23.31	23.94	24.92	25.74
Next 250	...	...	20.00	20.26	20.77	21.49	22.05	22.36	22.83	23.45	24.41	25.21
Next 350	...	...	...	20.00	20.50	21.22	21.77	22.07	22.54	23.15	24.09	24.89
Next 300	...	...	...	...	20.00	20.70	21.24	21.54	21.99	22.58	23.51	24.28
Next 350	...	...	...	...	...	20.00	20.52	20.81	21.24	21.82	22.71	23.46
Next 375	...	...	...	...	...	...	20.00	20.28	20.71	21.26	22.14	22.87
Next 175	...	...	...	...	...	...	...	20.00	20.42	20.97	21.83	22.55
Next 75	...	...	...	...	...	...	...	...	20.00	20.54	21.38	22.09
Next 175	...	...	...	...	...	...	...	...	...	20.00	20.82	21.51
Next 350	...	...	...	...	...	...	...	...	...	...	20.00	20.66
Next 275	...	...	...	...	...	...	...	...	...	...	...	20.00
Percentage increase in PIA	2.6	2.9	2.1	1.3	<sup>m</sup> 2.5	3.5	2.6	1.4	2.1	2.7	4.1	3.3

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

NOTE: The average monthly wage (AMW) computation is based on earnings after 1950. The amounts shown in the table are percentages of the AMW.

... = 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.
- m. 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.

## 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 <sup>a</sup> (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 <sup>b</sup>	150% of PIA
1972	September 1972	84.50	105.6% of first \$436 + 52.8% of next \$191 <sup>b</sup>	150% of PIA
1973 <sup>c</sup>	June 1974	89.50	111.8% of first \$436 + 55.9% of next \$191 <sup>b</sup>	150% of PIA
1973 <sup>d</sup>	March 1974	90.50	113.0% of first \$436 + 56.5% of next \$191 <sup>b</sup>	150% of PIA
	June 1974	93.80	117.2% of first \$436 + 58.6% of next \$191 <sup>b</sup>	150% of PIA
	June 1975	101.40	126.6% of first \$436 + 63.3% of next \$191 <sup>b</sup>	150% of PIA
	June 1976	107.90	134.7% of first \$436 + 67.3% of next \$191 <sup>b</sup>	150% of PIA
	June 1977	114.30	142.6% of first \$436 + 71.3% of next \$191 <sup>b</sup>	150% of PIA
	June 1978	121.80	151.9% of first \$436 + 76.0% of next \$191 <sup>b</sup>	150% of PIA
	June 1979	133.90	167.0% of first \$436 + 83.5% of next \$191 <sup>b</sup>	150% of PIA
	June 1980	153.10	190.9% of first \$436 + 95.4% of next \$191 <sup>b</sup>	150% of PIA
	June 1981	170.30	212.2% of first \$436 + 106.1% of next \$191 <sup>b</sup>	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 <sup>a</sup> (dollars)	Maximum family benefit	
			Percentage of AMW	Not less than—
1981 <sup>e</sup>	March 1982	f	190.9% of first \$436 + 106.1% of next \$191 <sup>b</sup>	150% of PIA
1981	June 1982	182.90	227.9% of first \$436 + 114.0% of next \$191 <sup>b</sup>	150% of PIA
	December 1983	189.30	235.9% of first \$436 + 118.0% of next \$191 <sup>b</sup>	150% of PIA
	December 1984	195.90	244.2% of first \$436 + 122.1% of next \$191 <sup>b</sup>	150% of PIA
	December 1985	201.90	251.8% of first \$436 + 125.9% of next \$191 <sup>b</sup>	150% of PIA
	December 1986	204.50	255.1% of first \$436 + 127.5% of next \$191 <sup>b</sup>	150% of PIA
	December 1987	213.00	265.8% of first \$436 + 132.9% of next \$191 <sup>b</sup>	150% of PIA
	December 1988	221.50	276.4% of first \$436 + 138.2% of next \$191 <sup>b</sup>	150% of PIA
	December 1989	231.90	289.4% of first \$436 + 144.7% of next \$191 <sup>b</sup>	150% of PIA
	December 1990	244.40	305.0% of first \$436 + 152.5% of next \$191 <sup>b</sup>	150% of PIA
	December 1991	253.40	316.3% of first \$436 + 158.1% of next \$191 <sup>b</sup>	150% of PIA
	December 1992	261.00	325.8% of first \$436 + 162.8% of next \$191 <sup>b</sup>	150% of PIA
	December 1993	267.70	334.3% of first \$436 + 167.0% of next \$191 <sup>b</sup>	150% of PIA
	December 1994	275.10	343.7% of first \$436 + 171.7% of next \$191 <sup>b</sup>	150% of PIA
	December 1995	282.20	352.6% of first \$436 + 176.2% of next \$191 <sup>b</sup>	150% of PIA
	December 1996	290.30	362.8% of first \$436 + 181.3% of next \$191 <sup>b</sup>	150% of PIA
	December 1997	296.30	370.4% of first \$436 + 185.1% of next \$191 <sup>b</sup>	150% of PIA
	December 1998	300.10	375.2% of first \$436 + 187.5% of next \$191 <sup>b</sup>	150% of PIA
	December 1999 <sup>g</sup>	307.60	384.6% of first \$436 + 192.2% of next \$191 <sup>b</sup>	150% of PIA
	December 2000	318.30	398.1% of first \$436 + 198.9% of next \$191 <sup>b</sup>	150% of PIA
	December 2001	326.50	408.5% of first \$436 + 204.1% of next \$191 <sup>b</sup>	150% of PIA
December 2002	331.00	414.2% of first \$436 + 206.9% of next \$191 <sup>b</sup>	150% of PIA	
December 2003	337.90	422.9% of first \$436 + 211.2% of next \$191 <sup>b</sup>	150% of PIA	
December 2004	347.00	434.3% of first \$436 + 216.9% of next \$191 <sup>b</sup>	150% of PIA	
December 2005	361.20	452.1% of first \$436 + 225.8% of next \$191 <sup>b</sup>	150% of PIA	
December 2006	373.10	467.0% of first \$436 + 233.30% of next \$191 <sup>b</sup>	150% of PIA	

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

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.

CONTACT: Alberta Presberry (410) 966-8473.

## 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 <sup>a</sup>	Year of attainment of age 62	Year of attainment of age 65	Full retirement age	Maximum reduction months	Maximum reduction at age 62 <sup>b</sup>
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, 2006; 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 <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.

CONTACT: Alberta Presberry (410) 966-8473.

## 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 (CPI) 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
	<b>Benefits (cont.)</b> <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. 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 cost-of-living adjustment 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 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.
	<b>Earnings test</b>
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. Public Law 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	Public Law 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	Public Law 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. Public Law 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, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

CONTACT: Alberta Presberry (410) 966-8473.



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	August 1950	September 1950	September 1952	September 1954	January 1959	January 1965	February 1968	January 1970	January 1971	September 1972	June 1974	June 1975	June 1976
August 1950	100	177	199	225	241	258	291	335	368	442	491	530	564
September 1950	...	100	113	127	136	146	164	189	208	250	277	299	318
September 1952	...	...	100	113	121	129	146	168	185	222	246	266	283
September 1954	...	...	...	100	107	114	129	149	164	196	218	235	250
January 1959	...	...	...	...	100	107	121	139	153	184	204	220	234
January 1965	...	...	...	...	...	100	113	130	143	172	190	206	219
February 1968	...	...	...	...	...	...	100	115	127	152	168	182	194
January 1970	...	...	...	...	...	...	...	100	110	132	147	158	168
January 1971	...	...	...	...	...	...	...	...	100	120	133	144	153
September 1972	...	...	...	...	...	...	...	...	...	100	111	120	128
June 1974	...	...	...	...	...	...	...	...	...	...	100	108	115
June 1975	...	...	...	...	...	...	...	...	...	...	...	100	106
June 1976	...	...	...	...	...	...	...	...	...	...	...	...	100
Cost-of-living adjustment	...	<sup>a</sup> 77.0	12.5	13.0	7.0	7.0	13.0	15.0	10.0	20.0	11.0	8.0	6.4

(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 1977	June 1978	June 1979	June 1980	June 1981	June 1982	Dec. 1983	Dec. 1984	Dec. 1985	Dec. 1986	Dec. 1987	Dec. 1988	Dec. 1989
August 1950	597	636	699	799	888	954	987	1,022	1,053	1,067	1,112	1,156	1,211
September 1950	337	359	395	451	502	539	558	577	595	603	628	653	684
September 1952	300	319	351	401	446	479	496	513	529	536	558	581	608
September 1954	265	283	310	355	395	424	439	454	468	474	494	514	538
January 1959	248	264	290	332	369	396	410	424	437	443	462	480	503
January 1965	232	247	271	310	345	370	383	397	409	414	432	449	470
February 1968	205	218	240	274	305	328	339	351	362	367	382	397	416
January 1970	178	190	209	239	265	285	295	305	315	319	332	345	362
January 1971	162	173	190	217	241	259	268	277	286	290	302	314	329
September 1972	135	144	158	181	201	216	223	231	238	241	252	262	274
June 1974	122	130	142	163	181	194	201	208	215	218	227	236	247
June 1975	113	120	132	151	168	180	186	193	199	201	210	218	229
June 1976	106	113	124	142	158	169	175	181	187	189	197	205	215
June 1977	100	107	117	134	149	160	165	171	176	179	186	194	203
June 1978	...	100	110	126	140	150	155	161	166	168	175	182	190
June 1979	...	...	100	114	127	137	141	146	151	153	159	166	173
June 1980	...	...	...	100	111	119	124	128	132	134	139	145	152
June 1981	...	...	...	...	100	107	111	115	119	120	125	130	136
June 1982	...	...	...	...	...	100	104	107	110	112	117	121	127
December 1983	...	...	...	...	...	...	100	104	107	108	113	117	123
December 1984	...	...	...	...	...	...	...	100	103	104	109	113	118
December 1985	...	...	...	...	...	...	...	...	100	101	106	110	115
December 1986	...	...	...	...	...	...	...	...	...	100	104	108	113
December 1987	...	...	...	...	...	...	...	...	...	...	100	104	109
December 1988	...	...	...	...	...	...	...	...	...	...	...	100	105
December 1989	...	...	...	...	...	...	...	...	...	...	...	...	100
Cost-of-living adjustment	5.9	6.5	9.9	14.3	11.2	7.4	3.5	3.5	3.1	1.3	4.2	4.0	4.7

(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. 1990	Dec. 1991	Dec. 1992	Dec. 1993	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
August 1950	1,276	1,323	1,363	1,398	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
September 1950	721	748	770	790	812	833	857	875	887	909	941	965	979	999	1,026	1,067	1,102
September 1952	641	665	684	702	722	741	762	778	788	808	836	858	870	888	912	949	981
September 1954	567	588	606	621	639	655	674	689	698	715	740	759	770	786	807	839	867
January 1959	530	550	566	581	597	613	630	644	652	668	692	710	720	735	754	785	811
January 1965	495	514	529	543	558	573	589	601	609	625	646	663	672	687	705	733	758
February 1968	438	455	468	480	494	507	521	532	539	553	572	587	595	608	624	649	670
January 1970	381	395	407	418	429	441	453	463	469	481	497	510	517	528	543	563	582
January 1971	347	359	370	380	390	401	412	421	426	437	452	464	470	480	493	512	529
September 1972	289	299	308	316	325	334	343	351	355	364	377	387	392	400	411	428	442
June 1974	260	270	278	285	293	301	309	316	320	328	339	348	353	361	370	385	398
June 1975	241	250	257	264	271	278	286	292	296	304	314	323	327	334	343	356	368
June 1976	226	235	242	248	255	262	269	275	278	285	295	303	307	314	322	335	346
June 1977	214	222	228	234	241	247	254	260	263	270	279	286	290	296	304	316	327
June 1978	201	208	214	220	226	232	239	244	247	253	262	269	273	278	286	296	306
June 1979	183	189	195	200	206	211	217	222	225	230	238	245	248	253	260	269	278
June 1980	160	166	171	175	180	185	190	194	197	201	209	214	217	222	227	235	243
June 1981	144	149	153	157	162	166	171	174	177	181	188	192	195	199	205	213	220
June 1982	134	139	143	147	151	155	159	162	165	169	175	179	182	185	190	197	203
December 1983	129	134	138	142	146	149	154	157	159	163	169	173	176	179	184	190	197
December 1984	125	130	133	137	141	144	149	152	154	157	163	167	170	173	178	184	190
December 1985	121	126	129	133	136	140	144	147	149	153	158	162	164	168	172	179	184
December 1986	120	124	128	131	135	138	142	145	147	151	156	160	162	166	170	176	182
December 1987	115	119	123	126	129	133	137	139	141	145	150	154	156	159	163	169	174
December 1988	110	114	118	121	124	128	131	134	136	139	144	148	150	153	157	163	168
December 1989	105	109	113	116	119	122	125	128	130	133	138	141	143	146	150	156	161
December 1990	100	104	107	110	113	116	119	121	123	126	131	134	136	139	142	148	152
December 1991	...	100	103	106	109	111	115	117	119	122	126	129	131	134	137	142	147
December 1992	...	...	100	103	105	108	111	114	115	118	122	125	127	130	133	138	142
December 1993	...	...	...	100	103	105	109	111	112	115	119	122	124	126	130	135	139
December 1994	...	...	...	...	100	103	106	108	109	112	116	119	121	123	126	131	136
December 1995	...	...	...	...	...	100	103	105	106	109	113	116	117	120	123	127	131
December 1996	...	...	...	...	...	...	100	102	103	106	110	113	114	117	120	124	128
December 1997	...	...	...	...	...	...	...	100	101	104	107	110	112	114	117	122	126
December 1998	...	...	...	...	...	...	...	...	100	103	106	109	110	113	116	120	124
December 1999	...	...	...	...	...	...	...	...	...	100	104	106	108	110	113	116	120
December 2000	...	...	...	...	...	...	...	...	...	...	100	103	104	106	109	113	117
December 2001	...	...	...	...	...	...	...	...	...	...	...	100	101	104	106	110	114
December 2002	...	...	...	...	...	...	...	...	...	...	...	...	100	102	105	109	113
December 2003	...	...	...	...	...	...	...	...	...	...	...	...	...	100	103	107	110
December 2004	...	...	...	...	...	...	...	...	...	...	...	...	...	...	100	104	108
December 2005	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	100	103
December 2006	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	100
Cost-of-living adjustment	5.4	3.7	3.0	2.6	2.8	2.6	2.9	2.1	1.3	<sup>b</sup> 2.5	3.5	2.6	1.4	2.1	2.7	4.1	3.3

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

NOTES: Growth reflects cost-of-living adjustments only. Data are 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																																	
<b>Retired worker</b>																																				
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% for each month under age 65.																																	
1961	Men: 62–64	...	Reduced 5/9 of 1% for each month under age 65.																																	
1972	...	...	Increased 1/12 of 1% 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% 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 year 2000, the age at which 100% 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% for each of the first 36 months of receipt of benefits immediately preceding the age at which 100% of PIA is payable, plus 5/12 of 1% 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% 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%</td><td>3.5</td></tr> <tr><td>1989–1990</td><td>8/24 of 1%</td><td>4</td></tr> <tr><td>1991–1992</td><td>9/24 of 1%</td><td>4.5</td></tr> <tr><td>1993–1994</td><td>10/24 of 1%</td><td>5</td></tr> <tr><td>1995–1996</td><td>11/24 of 1%</td><td>5.5</td></tr> <tr><td>1997–1998</td><td>12/24 of 1%</td><td>6</td></tr> <tr><td>1999–2000</td><td>13/24 of 1%</td><td>6.5</td></tr> <tr><td>2001–2002</td><td>14/24 of 1%</td><td>7</td></tr> <tr><td>2003–2004</td><td>15/24 of 1%</td><td>7.5</td></tr> <tr><td>2005 and later</td><td>16/24 of 1%</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%	3.5	1989–1990	8/24 of 1%	4	1991–1992	9/24 of 1%	4.5	1993–1994	10/24 of 1%	5	1995–1996	11/24 of 1%	5.5	1997–1998	12/24 of 1%	6	1999–2000	13/24 of 1%	6.5	2001–2002	14/24 of 1%	7	2003–2004	15/24 of 1%	7.5	2005 and later	16/24 of 1%	8
<i>Age 62 in years—</i>	<i>Rate of increase</i>	<i>Annual rate (percent)</i>																																		
1987–1988	7/24 of 1%	3.5																																		
1989–1990	8/24 of 1%	4																																		
1991–1992	9/24 of 1%	4.5																																		
1993–1994	10/24 of 1%	5																																		
1995–1996	11/24 of 1%	5.5																																		
1997–1998	12/24 of 1%	6																																		
1999–2000	13/24 of 1%	6.5																																		
2001–2002	14/24 of 1%	7																																		
2003–2004	15/24 of 1%	7.5																																		
2005 and later	16/24 of 1%	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
<b><i>Disabled worker</i></b>			
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% 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% 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% 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, 2006; 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 <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% 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 year 2000, the age at which 50% of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% 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% 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 year 2000, the age at which 50% of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% 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
<b>Child</b>			
1939	Under 18	...	Fully insured. <sup>a</sup>
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.
<b>Disabled child</b>			
1956	18 or older	...	Fully insured. <sup>a</sup> Disabled before age 18.
1972	...	...	Disabled before age 22.
	...	...	Includes grandchild under certain circumstances.
<b>Husband</b>			
1950	65 or older	50	Fully and currently insured. Dependent.
1961	62–64	...	Reduced 25/36 of 1% 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 year 2000, the age at which 50% of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
<b>Divorced husband</b>			
1977 <sup>b</sup>	65 or older	...	Fully insured. Married 10 years. Not counted toward family maximum.
	62–64	...	Reduced 25/36 of 1% 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 year 2000, the age at which 50% of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% 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
<b>Husband (father)</b>			
1978 <sup>c</sup>	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, 2006; 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 <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																										
<b>Widow</b>																													
1939	65 or older	75	Fully insured.																										
1956	62–64	...	...																										
1961	...	82.5	...																										
1965	60–61	...	Reduced 5/9 of 1% 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% of PIA.																										
	60–64	...	Reduced 19/40 of 1% 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% 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 year 2000, the age at which 100% 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% of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2% at age 60.																										
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.																										
<b>Disabled widow</b>																													
1967	50–59	82.5	Fully insured. Reduced 13 1/3%, plus 43/198 of 1% for each month under age 60. Includes divorced wife, dependent and married 20 years.																										
1972	...	100	Reduced 28 1/2%, plus 43/240 of 1% 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.																										
<b>Surviving divorced wife</b>																													
1965	60 or older	82.5	Fully insured. Dependent. Married 20 years. Not counted toward family maximum. Reduced 5/9 of 1% 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% of PIA.																										
	60–64	...	Reduced 19/40 of 1% 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% of PIA.																										

(Continued)



Table 2.A22—Monthly benefits for survivors of deceased workers—*Continued*

Year enacted	Age	Percentage of PIA	Condition or qualification
<b><i>Surviving divorced wife (cont.)</i></b>			
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 year 2000, the age at which 100% 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% of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2% at age 60.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
<b><i>Disabled surviving divorced wife</i></b>			
1967	50–59	82.5	Fully insured. Dependent. Married 20 years. Not counted toward family maximum. Reduced 13 1/3%, plus 43/198 of 1% for each month under age 62.
1972	...	100	Reduced 28 1/2%, plus 43/240 of 1% 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.
<b><i>Widowed mother</i></b>			
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.
<b><i>Surviving divorced mother</i></b>			
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.
<b><i>Child</i></b>			
1939	Under 18	50	Fully or currently insured. <sup>a</sup> Student aged 16–17.
1946	...	...	Student requirement eliminated.
1950	...	...	Plus 25% of PIA divided among the children.
1960	...	75	Additional 25% of PIA eliminated.

(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
<b>Child (cont.)</b>			
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.
<b>Disabled child</b>			
1956	18 or older	50	Fully or currently insured. <sup>a</sup> Disabled before age 18. Plus 25% of PIA divided among the children.
1960	...	75	Additional 25% of PIA eliminated.
1972	...	...	Disabled before age 22.
	...	...	Includes grandchild under certain circumstances.
<b>Parent</b>			
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% each if two parents.
<b>Widower</b>			
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% of PIA.
	60–64	...	Reduced 19/40 of 1% 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% 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 year 2000, the age at which 100% 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% of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2% at age 60.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
<b>Disabled widower</b>			
1967	50–61	82.5	Fully insured. Dependent. Reduced 5/9 of 1% per month between ages 60–62, plus 43/198 of 1% for each month under age 60.
1972	50–59	100	Reduced 28 1/2%, plus 43/240 of 1% 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.

(Continued)

Table 2.A22—Monthly benefits for survivors of deceased workers—*Continued*

Year enacted	Age	Percentage of PIA	Condition or qualification
<b>Disabled widower (cont.)</b>			
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.
<b>Surviving divorced husband</b>			
1980 <sup>b</sup>	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% 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% 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% 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 year 2000, the age at which 100% 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% of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2% at age 60.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
<b>Disabled surviving divorced husband</b>			
1980 <sup>b</sup>	50–59	100	Fully insured. Married 10 years. Increased by any delayed retirement credit former wife would be receiving. Reduced 28 1/2%, plus 43/240 of 1% 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.
<b>Widowed father</b>			
1975 <sup>c</sup>	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.
<b>Surviving divorced father</b>			
1979 <sup>d</sup>	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, 2006; 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 <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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## 2.A OASDI: Benefit Types and Levels

**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, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>.

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**Table 2.A24—Monthly benefits for individuals and couples insured for special age-72 (Prouty) benefits**

Year enacted	Effective date	Age	Amount <sup>a</sup> (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 <sup>b</sup>	September 1972	...	58.00	87.00
1973 <sup>c</sup>	June–December 1974	...	61.50	92.30
1973 <sup>d</sup>	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 <sup>e</sup>	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)

## 2.A OASDI: Benefit Types and Levels

**Table 2.A24—Monthly benefits for individuals and couples insured for special age-72 (Prouty) benefits—Continued**

Year enacted	Effective date	Age	Amount <sup>a</sup> (dollars)	
			Individual	Couple
1990	December 1990	72 before 1972 <sup>f</sup>	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 <sup>g</sup>	...	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	...

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

NOTE: ... = not applicable.

- 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.
- Provision for future automatic cost-of-living adjustments.
- Suspended by legislation in 1973.
- Beginning June 1975, subject to automatic cost-of-living adjustments. Benefits no longer available to persons receiving payments under the Supplemental Security Income program.
- Separate rate for couples eliminated. Rate for individuals applied to all beneficiaries.
- Effective for applications after November 5, 1990.
- 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.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. <sup>a</sup>
<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, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>.

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.

CONTACT: Alberta Presberry (410) 966-8473.

## 2.A OASDI: Benefit Types and Levels

**Table 2.A26—Monthly benefit amount for selected beneficiary families with first eligibility in 2006, by average indexed monthly earnings for stipulated yearly wage levels, effective December 2006 (in dollars)**

Beneficiary family	Federal minimum wage <sup>a</sup>	75% of average wage	Average wage <sup>b</sup>	150% of average wage	Maximum taxable earnings <sup>c</sup>
<b>Retired-worker families<sup>d</sup></b>					
Average indexed monthly earnings	1,320.00	2,230.00	2,973.00	4,431.00	6,515.00
Primary insurance amount	829.20	1,130.10	1,375.70	1,774.00	2,096.90
Maximum family benefit	1,243.90	2,017.70	2,512.20	3,105.00	3,670.10
Monthly benefit amount for retired worker claiming benefits at age 62					
Worker alone	621.00	847.00	1,031.00	1,330.00	1,572.00
Worker with spouse claiming benefits at—					
Full retirement age or older <sup>e</sup>	1,035.00	1,412.00	1,718.00	2,217.00	2,620.00
Age 62	911.00	1,242.00	1,512.00	1,950.00	2,305.00
<b>Survivor families<sup>f</sup></b>					
Average indexed monthly earnings	1,083.00	2,234.00	2,979.00	4,468.00	7,352.00
Primary insurance amount	750.90	1,131.40	1,377.70	1,779.80	2,226.70
Maximum family benefit	1,126.40	2,021.30	2,514.80	3,155.20	3,897.10
Monthly benefit amount for survivor of worker deceased at age 40					
1 surviving child	563.00	848.00	1,033.00	1,334.00	1,670.00
Widowed mother or father and 1 child	1,126.00	1,696.00	2,066.00	2,668.00	3,340.00
Widowed mother or father and 2 children	1,125.00	2,019.00	2,514.00	3,114.00	3,897.00
<b>Disabled-worker families<sup>g</sup></b>					
Average indexed monthly earnings	1,210.00	2,231.00	2,975.00	4,463.00	7,213.00
Primary insurance amount	792.90	1,130.50	1,376.30	1,779.00	2,205.10
Maximum family benefit <sup>h</sup>	1,062.40	1,695.70	2,064.50	2,668.50	3,307.60
Monthly benefit amount for disabled worker age 50					
Worker alone	792.00	1,130.00	1,376.00	1,779.00	2,205.00
Worker, spouse, and 1 child	1,060.00	1,694.00	2,064.00	2,667.00	3,307.00

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

- 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 2006 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 2006 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 2006, 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.

CONTACT: Alberta Presberry (410) 966-8473.



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, 1957–2007 (in dollars)

Year <sup>a</sup>	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2006 <sup>b</sup>	At retirement		Effective December 2006 <sup>b</sup>	
			Men	Women	Men	Women
1957	24.00	351.30	...	86.80	...	866.40
1958	24.00	351.30	...	86.80	...	866.40
1959	26.40	351.30	...	92.80	...	866.40
1960	26.40	349.80	...	95.20	...	888.70
1961	26.40	347.90	...	96.00	...	895.10
1962	32.00	346.80	93.60	96.80	873.00	903.10
1963	32.00	345.10	94.40	97.60	879.00	909.10
1964	32.00	345.10	95.20	98.40	884.70	915.00
1965	35.20	344.70	102.80	105.40	889.60	913.10
1966	35.20	341.70	102.80	106.20	886.60	916.30
1967	35.20	339.70	105.40	108.80	906.30	934.90
1968	<sup>c</sup> 44.00	335.20	<sup>c</sup> 121.00	<sup>c</sup> 124.80	910.80	940.70
1969	44.00	332.00	124.80	128.40	930.60	957.90
1970	51.20	327.20	146.80	151.90	939.60	972.00
1971	56.40	322.90	163.60	170.50	938.10	978.50
1972	56.40	318.30	167.10	172.90	945.70	978.30
1973	67.60	313.90	207.60	212.90	963.30	988.90
1974	67.60	308.80	217.00	219.70	993.00	1004.90
1975	75.10	304.80	253.10	253.10	1028.10	1028.10
1976	81.20	301.20	285.60	285.60	1061.50	1061.50
1977	86.40	299.00	319.40	319.40	1108.20	1108.20
1978	91.50	297.60	354.60	354.60	1159.00	1159.00
1979	97.60	298.80	<sup>d</sup> 388.90	<sup>d</sup> 388.90	1193.80	1193.80
1980	97.60	271.50	<sup>d</sup> 402.80	<sup>d</sup> 402.80	1124.90	1124.90
1981	97.60	237.20	432.00	432.00	1055.10	1055.10
1982	<sup>e</sup>	<sup>e</sup>	474.60	474.60	1042.70	1042.70
1983	<sup>e</sup>	<sup>e</sup>	526.40	526.40	1076.40	1076.40
1984	<sup>e</sup>	<sup>e</sup>	559.40	559.40	1105.40	1105.40
1985	<sup>e</sup>	<sup>e</sup>	591.30	591.30	1129.40	1129.40
1986	<sup>e</sup>	<sup>e</sup>	630.50	630.50	1168.00	1168.00
1987	<sup>e</sup>	<sup>e</sup>	662.10	662.10	1210.80	1210.80
1988	<sup>e</sup>	<sup>e</sup>	686.70	686.70	1205.30	1205.30
1989	<sup>e</sup>	<sup>e</sup>	734.00	734.00	1238.60	1238.60
1990	<sup>e</sup>	<sup>e</sup>	774.60	774.60	1248.70	1248.70
1991	<sup>e</sup>	<sup>e</sup>	810.00	810.00	1238.80	1238.80
1992	<sup>e</sup>	<sup>e</sup>	854.10	854.10	1260.10	1260.10
1993	<sup>e</sup>	<sup>e</sup>	893.60	893.60	1280.00	1280.00
1994	<sup>e</sup>	<sup>e</sup>	948.00	948.00	1323.50	1323.50
1995	<sup>e</sup>	<sup>e</sup>	965.90	965.90	1312.00	1312.00
1996	<sup>e</sup>	<sup>e</sup>	999.90	999.90	1323.70	1323.70
1997	<sup>e</sup>	<sup>e</sup>	1,049.10	1,049.10	1350.00	1350.00
1998	<sup>e</sup>	<sup>e</sup>	1,109.60	1,109.60	1398.50	1398.50
1999	<sup>e</sup>	<sup>e</sup>	1,183.60	1,183.60	<sup>f</sup> 1472.60	<sup>f</sup> 1472.60

(Continued)

## 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, 1957–2007 (in dollars)—Continued**

Year <sup>a</sup>	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2006 <sup>b</sup>	At retirement		Effective December 2006 <sup>b</sup>	
			Men	Women	Men	Women
2000	e	e	1,241.70	1,241.70	1507.20	1507.20
2001	e	e	1,307.30	1,307.30	1533.10	1533.10
2002	e	e	1,375.30	1,375.30	1572.20	1572.20
2003	e	e	1,404.30	1,404.30	1583.20	1583.20
2004	e	e	1,414.80	1,414.80	1562.30	1562.30
2005	e	e	1,444.90	1,444.90	1553.70	1553.70
2006	e	e	1,522.50	1,522.50	1572.70	1572.70
2007	e	e	1,589.40	1,589.40	...	...

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

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 24.166667 percent. In 2005, 2006, and 2007, 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.

CONTACT: Alberta Presberry (410) 966-8473.

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, 1940–2007 (in dollars)**

Year <sup>a</sup>	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2006 <sup>b</sup>	At retirement		Effective December 2006 <sup>b</sup>	
			Men	Women	Men	Women
1940	10.00	372.80	41.20	41.20	722.80	722.80
1941	10.00	372.80	41.60	41.60	722.80	722.80
1942	10.00	372.80	42.00	42.00	731.40	731.40
1943	10.00	372.80	42.40	42.40	731.40	731.40
1944	10.00	372.80	42.80	42.80	731.40	731.40
1945	10.00	372.80	43.20	43.20	739.30	739.30
1946	10.00	372.80	43.60	43.60	748.30	748.30
1947	10.00	372.80	44.00	44.00	755.20	755.20
1948	10.00	372.80	44.40	44.40	755.20	755.20
1949	10.00	372.80	44.80	44.80	762.90	762.90
1950	10.00	372.80	45.20	45.20	772.30	772.30
1951	20.00	372.80	68.50	68.50	772.30	772.30
1952	20.00	372.80	68.50	68.50	772.30	772.30
1953	25.00	372.80	85.00	85.00	853.30	853.30
1954	25.00	372.80	85.00	85.00	853.30	853.30
1955	30.00	372.80	98.50	98.50	853.30	853.30
1956	30.00	372.80	103.50	103.50	901.60	901.60
1957	30.00	372.80	108.50	108.50	942.40	942.40
1958	30.00	372.80	108.50	108.50	942.40	942.40
1959	33.00	372.80	116.00	116.00	942.40	942.40
1960	33.00	372.80	119.00	119.00	966.00	966.00
1961	33.00	372.80	120.00	120.00	973.80	973.80
1962	40.00	372.80	121.00	123.00	982.60	999.40
1963	40.00	372.80	122.00	125.00	990.40	1,014.10
1964	40.00	372.80	123.00	127.00	999.40	1,031.30
1965	44.00	372.80	131.70	135.90	999.40	1,031.30
1966	44.00	372.80	132.70	135.90	1,006.60	1,031.30
1967	44.00	372.80	135.90	140.00	1,031.30	1,061.70
1968	<sup>c</sup> 55.00	372.80	<sup>c</sup> 156.00	<sup>c</sup> 161.60	1,046.70	1,084.40
1969	55.00	372.80	160.50	167.30	1,077.40	1,122.70
1970	64.00	372.80	189.80	196.40	1,107.50	1,147.00
1971	70.40	372.80	213.10	220.40	1,130.20	1,168.10
1972	70.40	372.80	216.10	224.70	1,147.00	1,191.70
1973	84.50	372.80	266.10	276.40	1,176.20	1,221.80
1974	84.50	372.80	274.60	284.90	1,213.10	1,259.30
1975	93.80	372.80	316.30	333.70	1,259.30	1,328.50
1976	101.40	372.80	364.00	378.80	1,340.90	1,395.60
1977	107.90	372.80	412.70	422.40	1,429.40	1,462.50
1978	114.30	372.80	459.80	459.80	1,503.70	1,503.70
1979	121.80	372.80	503.40	503.40	1,545.40	1,545.40
1980	133.90	372.80	572.00	572.00	1,597.90	1,597.90
1981	153.10	372.80	677.00	677.00	1,654.60	1,654.60
1982	<sup>d</sup> 170.30	372.80	<sup>d</sup> 679.30	<sup>d</sup> 679.30	1,492.10	1,492.10
1983	<sup>d</sup> 166.40	339.10	709.50	709.50	1,451.60	1,451.60
1984	<sup>d</sup> 150.50	295.80	703.60	703.60	1,390.80	1,390.80
1985	<sup>e</sup>	<sup>e</sup>	717.20	717.20	1,370.00	1,370.00
1986	<sup>e</sup>	<sup>e</sup>	760.10	760.10	1,408.20	1,408.20
1987	<sup>e</sup>	<sup>e</sup>	789.20	789.20	1,443.60	1,443.60
1988	<sup>e</sup>	<sup>e</sup>	838.60	838.60	1,472.30	1,472.30
1989	<sup>e</sup>	<sup>e</sup>	899.60	899.60	1,518.40	1,518.40
1990	<sup>e</sup>	<sup>e</sup>	975.00	975.00	1,572.20	1,572.20
1991	<sup>e</sup>	<sup>e</sup>	1,022.90	1,022.90	1,564.90	1,564.90
1992	<sup>e</sup>	<sup>e</sup>	1,088.70	1,088.70	1,606.40	1,606.40
1993	<sup>e</sup>	<sup>e</sup>	1,128.80	1,128.80	1,617.10	1,617.10
1994	<sup>e</sup>	<sup>e</sup>	1,147.50	1,147.50	1,602.10	1,602.10
1995	<sup>e</sup>	<sup>e</sup>	1,199.10	1,199.10	1,628.80	1,628.80
1996	<sup>e</sup>	<sup>e</sup>	1,248.90	1,248.90	1,653.50	1,653.50
1997	<sup>e</sup>	<sup>e</sup>	1,326.60	1,326.60	1,707.10	1,707.10
1998	<sup>e</sup>	<sup>e</sup>	1,342.80	1,342.80	1,692.40	1,692.40
1999	<sup>e</sup>	<sup>e</sup>	1,373.10	1,373.10	1,708.40	1,708.40

(Continued)

## 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, 1940–2007 (in dollars)—Continued**

Year <sup>a</sup>	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2006 <sup>b</sup>	At retirement		Effective December 2006 <sup>b</sup>	
			Men	Women	Men	Women
2000	e	e	1,435.30	1,435.30	1,742.40	1,742.40
2001	e	e	<sup>f</sup> 1,538.20	<sup>f</sup> 1,538.20	1,804.10	1,804.10
2002	e	e	1,660.50	1,660.50	1,898.30	1,898.30
2003 <sup>g</sup>	e	e	1,721.70	1,721.70	1,941.20	1,941.20
2004 <sup>h</sup>	e	e	1,784.80	1,784.80	1,970.90	1,970.90
2005 <sup>i</sup>	e	e	1,874.30	1,874.30	2,015.40	2,015.40
2006 <sup>j</sup>	e	e	1,961.90	1,961.90	2,026.60	2,026.60
2007 <sup>k</sup>	e	e	1,998.70	1,998.70	...	...

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

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.
- 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.

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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 <sup>a</sup>
				Annual earnings (dollars)	Monthly wages <sup>b</sup> (dollars)	
<b>For all beneficiaries</b>						
1935	...	...	Covered	...	...	Full monthly benefit
1939	1940	...	...	...	14.99	...
1950	1951	Aged 75 or older	...	<sup>c</sup> 600	50.00	...
1952	1953	...	...	<sup>c</sup> 900	75.00	...
1954	1955	Aged 72 or older	All <sup>d</sup>	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			<sup>e</sup> 2,520	<sup>e</sup> 210.00	\$1 for each \$2 of earnings above \$2,520
	1976			<sup>e</sup> 2,760	<sup>e</sup> 230.00	\$1 for each \$2 of earnings above \$2,760
	1977			<sup>e</sup> 3,000	<sup>e</sup> 250.00	\$1 for each \$2 of earnings above \$3,000
<b>For beneficiaries who have not reached full retirement age <sup>f</sup></b>						
1977	1978	...	...	<sup>e</sup> 3,240	<sup>e</sup> 270.00	\$1 for each \$2 of earnings above \$3,240
	1979			<sup>e</sup> 3,480	<sup>e</sup> 290.00	\$1 for each \$2 of earnings above \$3,480
	1980			<sup>e</sup> 3,720	<sup>e</sup> 310.00	\$1 for each \$2 of earnings above \$3,720
	1981			<sup>e</sup> 4,080	<sup>e</sup> 340.00	\$1 for each \$2 of earnings above \$4,080
	1982			<sup>e</sup> 4,440	<sup>e</sup> 370.00	\$1 for each \$2 of earnings above \$4,440
	1983			<sup>e</sup> 4,920	<sup>e</sup> 410.00	\$1 for each \$2 of earnings above \$4,920
	1984			<sup>e</sup> 5,160	<sup>e</sup> 430.00	\$1 for each \$2 of earnings above \$5,160
	1985			<sup>e</sup> 5,400	<sup>e</sup> 450.00	\$1 for each \$2 of earnings above \$5,400
	1986			<sup>e</sup> 5,760	<sup>e</sup> 480.00	\$1 for each \$2 of earnings above \$5,760
	1987			<sup>e</sup> 6,000	<sup>e</sup> 500.00	\$1 for each \$2 of earnings above \$6,000
	1988			<sup>e</sup> 6,120	<sup>e</sup> 510.00	\$1 for each \$2 of earnings above \$6,120
	1989			<sup>e</sup> 6,480	<sup>e</sup> 540.00	\$1 for each \$2 of earnings above \$6,480
	1990			<sup>e</sup> 6,840	<sup>e</sup> 570.00	\$1 for each \$2 of earnings above \$6,840
	1991			<sup>e</sup> 7,080	<sup>e</sup> 590.00	\$1 for each \$2 of earnings above \$7,080
	1992			<sup>e</sup> 7,440	<sup>e</sup> 620.00	\$1 for each \$2 of earnings above \$7,440
	1993			<sup>e</sup> 7,680	<sup>e</sup> 640.00	\$1 for each \$2 of earnings above \$7,680
	1994			<sup>e</sup> 8,040	<sup>e</sup> 670.00	\$1 for each \$2 of earnings above \$8,040
	1995			<sup>e</sup> 8,160	<sup>e</sup> 680.00	\$1 for each \$2 of earnings above \$8,160
	1996			<sup>e</sup> 8,280	<sup>e</sup> 690.00	\$1 for each \$2 of earnings above \$8,280
	1997			<sup>e</sup> 8,640	<sup>e</sup> 720.00	\$1 for each \$2 of earnings above \$8,640
	1998			<sup>e</sup> 9,120	<sup>e</sup> 760.00	\$1 for each \$2 of earnings above \$9,120
	1999			<sup>e</sup> 9,600	<sup>e</sup> 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 <sup>a</sup>
				Annual earnings (dollars)	Monthly wages <sup>b</sup> (dollars)	
<i>For beneficiaries who have reached full retirement age <sup>f</sup></i>						
1977	1978	...	...	<sup>g</sup> 4,000	<sup>g</sup> 333.33	\$1 for each \$2 of earnings above \$4,000
	1979			<sup>g</sup> 4,500	<sup>g</sup> 375.00	\$1 for each \$2 of earnings above \$4,500
	1980			<sup>g</sup> 5,000	<sup>g</sup> 416.66	\$1 for each \$2 of earnings above \$5,000
	1981			<sup>g</sup> 5,500	<sup>g</sup> 458.33	\$1 for each \$2 of earnings above \$5,500
	1982			<sup>g</sup> 6,000	<sup>g</sup> 500.00	\$1 for each \$2 of earnings above \$6,000
1981	1983	Aged 70 or older	Up to age 70	...	...	...
	1983			<sup>e</sup> 6,600	<sup>e</sup> 550.00	\$1 for each \$2 of earnings above \$6,600
	1984			<sup>e</sup> 6,960	<sup>e</sup> 580.00	\$1 for each \$2 of earnings above \$6,960
	1985			<sup>e</sup> 7,320	<sup>e</sup> 610.00	\$1 for each \$2 of earnings above \$7,320
	1986			<sup>e</sup> 7,800	<sup>e</sup> 650.00	\$1 for each \$2 of earnings above \$7,800
	1987			<sup>e</sup> 8,160	<sup>e</sup> 680.00	\$1 for each \$2 of earnings above \$8,160
	1988			<sup>e</sup> 8,400	<sup>e</sup> 700.00	\$1 for each \$2 of earnings above \$8,400
	1989			<sup>e</sup> 8,880	<sup>e</sup> 740.00	\$1 for each \$2 of earnings above \$8,880
1983	1990	...	...	...	...	\$1 for each \$3 of earnings above exempt amount
	1990			<sup>e</sup> 9,360	<sup>e</sup> 780.00	\$1 for each \$3 of earnings above \$9,360
	1991			<sup>e</sup> 9,720	<sup>e</sup> 810.00	\$1 for each \$3 of earnings above \$9,720
	1992			<sup>e</sup> 10,200	<sup>e</sup> 850.00	\$1 for each \$3 of earnings above \$10,200
	1993			<sup>e</sup> 10,560	<sup>e</sup> 880.00	\$1 for each \$3 of earnings above \$10,560
	1994			<sup>e</sup> 11,160	<sup>e</sup> 930.00	\$1 for each \$3 of earnings above \$11,160
1996	1995			<sup>e</sup> 11,280	<sup>e</sup> 940.00	\$1 for each \$3 of earnings above \$11,280
	1996	...	...	12,500	<sup>h</sup> 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	<sup>i</sup> 1,208.33	\$1 for each \$3 of earnings above \$14,500
	1999			15,500	<sup>j</sup> 1,291.67	\$1 for each \$3 of earnings above \$15,500
2000	2000	...	Earnings test eliminated at full retirement age <sup>k</sup>	...	...	...

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

NOTE: ... = 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, 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.
- 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.
- Applied to self-employment income only.
- Special provisions for earnings in noncovered employment outside the United States.
- Became effective because of automatic adjustment provisions mandated by legislation in 1972 and 1973.
- 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.
- Discretionary increase included in legislation of 1977.
- Actual amount is \$1,041.66 2/3.
- Actual amount is \$1,208.33 1/3.
- Actual amount is \$1,291.66 2/3.
- 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. Public Law 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.

## 2.A OASDI: Effect of Current Earnings and Taxation of Benefits

**Table 2.A29.1—Earnings (retirement) test for 2000–2007, 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 <sup>a</sup>
				Annual earnings <sup>b</sup> (dollars)	Monthly wages <sup>c</sup> (dollars)	
<b><i>For beneficiaries who have reached full retirement age <sup>d</sup></i></b>						
2000	2000	...	The earnings test no longer applies effective with the month of attainment of full retirement age.	...	...	...
<b><i>For beneficiaries who will not reach full retirement age during year <sup>d</sup></i></b>						
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
<b><i>For beneficiaries who will reach full retirement age during year <sup>d</sup></i></b>						
2000	2000	...	...	17,000	<sup>e</sup> 1,416.67	\$1 for each \$3 of earnings above \$17,000
	2001			25,000	<sup>f</sup> 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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

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. Public Law 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.

- 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, 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.
- b. Automatic adjustment provisions and legislative history of the earnings test are in Table 2.A18.
- c. 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.
- d. 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.
- e. Actual amount is \$1,416.66 2/3.
- f. Actual amount is \$2,083.33 1/3.

CONTACT: Alberta Presberry (410) 966-8473.

## 2.A OASDI: Effect of Current Earnings and Taxation of Benefits

**Table 2.A30—Monthly earnings guidelines for substantial gainful activity, 1961–2007 (in dollars)**

Year	Nonblind beneficiaries <sup>a</sup>		Blind beneficiaries <sup>b</sup>
	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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2006; 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 <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2007," *Federal Register*, vol. 71, no. 207 (October 26, 2006).

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.

- 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.
- The amendments in 1977 provided that, effective 1978, earnings of blind beneficiaries would be evaluated under different SGA guidelines than are nonblind beneficiaries.
- Guidelines pre-1978 are the same as those applicable to nonblind beneficiaries.
- 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.



## 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—
<b>Married filing jointly</b>			
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
<b>Married filing separate returns <sup>a</sup></b>			
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
<b>Individuals in all other filing categories</b>			
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, 2006; 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 <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.

## 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 <sup>a</sup>	Amount of benefits <sup>b</sup>	One-half of benefits <sup>b</sup>	Income to be compared with base amount	Relevant base amount <sup>c</sup>	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—less of one-half of benefits or one-half of income over base amount	If income exceeds upper base amount—less of 85 percent of benefits or one-half of base amounts plus 85 percent of income over upper base amount
(A)	(B)	(C)	(D = A + C)	(E)	(F = D - E)	(G = F / 2)	(H = .85 F)	(I)	(J = .85 B)	(K = lesser of C or G)	(L = lesser of J or I + H)
<b>Married filing jointly</b>											
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
<b>Married filing separate returns <sup>d</sup></b>											
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
<b>Individuals in all other filing categories</b>											
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, 2006; 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 <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.

- 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, including workers' compensation benefits to the extent they cause a reduction in either of these two types of benefits.
- For married couples filing joint returns, up to 50 percent of benefits are subject to income tax if gross income is over \$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).
- 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.

Table 2.B1—Federal benefit rates, by living arrangement, 1974–2007

Act	Effective date	Amount <sup>a</sup> (dollars)	
		Individual	Couple
<i>Own household <sup>b</sup></i>			
1972	January 1, 1974 <sup>c</sup>	130.00	195.00
1973	January 1, 1974	140.00	210.00
1973	July 1, 1974	146.00	219.00
1974 <sup>d</sup>	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
	July 1, 1982	284.30	426.40
1983	July 1, 1983 <sup>e</sup>	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	<sup>f</sup> 513.00	769.00
	January 1, 2001	<sup>f</sup> 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	
<i>Receiving institutional care covered by Medicaid <sup>g</sup></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, 2006; 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 <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 Medicare: History of Provisions

**Table 2.C1—Medicare cost sharing and premium amounts, 1966–2008**

Effective date <sup>a</sup>	Hospital Insurance (Medicare Part A)				Supplementary Medical Insurance (Medicare Parts B and D)										
	All expenses in "benefit period" covered except—				Monthly premium <sup>b</sup> (dollars)	Part B					Part D				
						Annual deductible <sup>c</sup> (dollars)	Coinsurance <sup>c</sup> (percent)	Monthly premium (dollars)		Annual deductible <sup>d,e</sup> (dollars)	Initial coverage limit <sup>d,e</sup> (dollars)	Out-of-pocket threshold <sup>d,e</sup> (dollars)	Base beneficiary premium <sup>d,f</sup> (dollars)		
	For enrollee <sup>g,h</sup> (aged and disabled)	Government amounts for—													
Aged		Disabled <sup>h</sup>													
	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 after 20 days (1/8 x IHD) (dollars)											
1966	40	10	i	i	...	50	20	3.00	3.00	...	...	...	...	...	
1967	40	10	i	5.00	...	50	20	3.00	3.00	...	...	...	...	...	
1968	40	10	20	5.00	...	i 50	i 20	k 4.00	k 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	l 20	5.80	5.80	...	...	...	...	...	
1973	72	18	36	9.00	33	60	20	m 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	n,o 60	o 20	11.00	34.20	62.20	...	...	...	...	
1982	260	65	130	32.50	113	p 75	p 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	q 560	q	q	r 25.50	156	75	20	s 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	t 245	100	20	41.10	82.50	111.10	...	...	...	...	
1995	716	179	358	89.50	t 261	100	20	46.10	100.10	165.50	...	...	...	...	
1996	736	184	368	92.00	t 289	100	20	42.50	127.30	167.70	...	...	...	...	
1997	760	190	380	95.00	t 311	100	20	43.80	131.40	177.00	...	...	...	...	
1998	764	191	382	95.50	t 309	100	20	43.80	132.00	150.40	...	...	...	...	
1999	768	192	384	96.00	t 309	100	20	45.50	139.10	160.50	...	...	...	...	
2000	776	194	388	97.00	t 301	100	20	45.50	138.30	196.70	...	...	...	...	
2001	792	198	396	99.00	t 300	100	20	50.00	152.00	214.40	...	...	...	...	
2002	812	203	406	101.50	t 319	100	20	54.00	164.60	192.20	...	...	...	...	
2003	840	210	420	105.00	t 316	100	20	58.70	178.70	223.30	...	...	...	...	
2004	876	219	438	109.50	t 343	100	20	66.60	199.80	284.40	u	u	u	u	
2005	912	228	456	114.00	t 375	110	20	78.20	234.60	305.40	u	u	u	u	
2006	952	238	476	119.00	t 393	124	20	88.50	265.30	318.90	250	2,250	v 3,600	w 32.20	
2007	992	248	496	124.00	t 410	131	20	x 93.50	y 280.50	y 301.10	265	2,400	v 3,850	w 27.35	
2008	1,024	256	512	128.00	t 423	135	20	x 96.40	y 289.00	y 323.00	275	2,510	v 4,050	w 27.93	

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 researched and utilized.

... = not applicable.

a. The deductible and coinsurance amounts begin in January unless otherwise noted. The monthly premium amounts were effective in July through 1983 and in January for 1984 and succeeding years.

**Table 2.C1—Medicare cost sharing and premium amounts, 1966–2008—Continued**

- b. 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.) In most (but not all) cases, a surcharge applies for those beneficiaries who enroll after their initial enrollment period.
- c. Most (but not all) services under Part B are subject to the annual deductible and coinsurance percentages shown. Some noteworthy exceptions are footnoted. Noteworthy exceptions in recent years, as of this writing, 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; 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. Original sources of authority, such as the laws, regulations, and rulings for Part B, should be consulted if specific details are required.
- d. There are substantial premium and cost-sharing subsidies for Part D beneficiaries who meet certain low-income and limited-resources criteria. Subsidy levels vary on the basis of dual-eligibility status (that is, coverage by both Medicaid and Medicare), income level, asset level, and institutionalized/noninstitutionalized status. Premiums and cost-sharing amounts for beneficiaries meeting the criteria may be reduced or waived. (The subsidies are financed by certain payments from the general fund of the U.S. Treasury and from the states.) Original sources of authority, such as the laws, regulations, and rulings for Part D, should be consulted if specific details are required.
- e. Under the standard Part D benefit design, there is an initial deductible. After meeting the deductible, the beneficiary pays 25 percent of the remaining costs until the initial coverage limit is reached. The beneficiary is then responsible for all costs until the out-of-pocket threshold is reached. (Included in the total out-of-pocket expenditures are the deductible, the 25 percent of costs that is paid by the beneficiary after the deductible is met until the initial coverage limit is reached, and the 100 percent the beneficiary pays for costs above the initial coverage limit. 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 to this "true out-of-pocket" provision is cost-sharing assistance from the low-income subsidies provided under Part D and from State Pharmacy Assistance programs.) For costs thereafter, there is catastrophic coverage that requires enrollees to pay the greater of 5 percent coinsurance or a small defined copayment amount (\$2 in 2006, \$2.15 in 2007, and \$2.25 in 2008 for generic or preferred multisource drugs, and \$5.00 in 2006, \$5.35 in 2007, and \$5.60 in 2008 for other drugs). 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, partial coverage in the coverage gap. Covered drugs may vary by plan. Original sources of authority, such as the laws, regulations, and rulings for Part D, should be consulted if more specific details are required.
- f. Part D base beneficiary premium. The actual Part D premiums paid by individual beneficiaries equal the base beneficiary premiums adjusted by a number of factors. Premiums vary significantly from one Part D plan to another and seldom equal the base beneficiary premium. A surcharge for enrollment after an individual's initial enrollment period may apply. (Late enrollment penalties do not apply to enrollees who have maintained creditable prescription drug coverage.) Enrollment in Part D is voluntary.
- g. Standard premium rate for voluntary enrollment in Part B. While this will be the amount paid by most Part B beneficiaries, there are three provisions that can alter the premium rate for certain enrollees. First, in most (but not all) cases, a surcharge applies for those beneficiaries who enroll after their initial enrollment period. 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; see footnote x. 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 certain individuals who have their premiums deducted from their Social Security checks.
- h. Beginning in July 1973 for the disabled.
- i. Benefit not provided.
- j. Professional inpatient services of pathologists and radiologists not subject to deductible or coinsurance, beginning in April 1968.
- k. Beginning in April 1968.
- l. Home health services not subject to coinsurance, beginning in January 1973.
- m. Standard monthly premiums for July and August 1973 were reduced to \$5.80 and \$6.10, respectively, by the Cost of Living Council.
- n. Home health services not subject to deductible, beginning July 1, 1981.
- o. Professional inpatient services of pathologists and radiologists not subject to deductible or coinsurance, beginning in April 1968, but only when physician accepts assignment.
- p. Effective October 1, 1982, professional inpatient services of pathologists and radiologists are subject to deductible and coinsurance.
- q. Unlike all other years, the 1989 deductible was applied on an annual, rather than a benefit period, basis. Once the deductible was paid by the beneficiary, 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 by the 190-day lifetime maximum).
- r. The coinsurance amount in 1989 was equal to 20 percent of the estimated national average daily cost of covered skilled nursing facility care, rather than 1/8 of the inpatient hospital deductible. The beneficiary paid the coinsurance amount for the first 8 days of care in 1989, rather than for days of care 21 to 100 in a benefit period as in all other years. Skilled nursing facility benefits were available for up to 150 days of care per year in 1989, rather than for up to 100 days of care per benefit period as in all other years.
- s. Includes the standard monthly Part B premium and a supplemental monthly flat premium under the Medicare Catastrophic Coverage Act of 1988. Amount shown is for most Part B enrollees. Residents of Puerto Rico and other territories and commonwealths, as well as persons enrolled in Part B only, paid different supplemental flat premiums, resulting in a smaller premium than that shown.
- t. A reduced premium is available to individuals aged 65 and older who are not otherwise entitled to HI but who have (or who were married to, widowed, or divorced from a spouse for certain periods of time who has or had) at least 30 quarters of Medicare-covered employment. The reduced premium is \$184, \$183, \$188, \$187, \$170, \$170, \$166, \$165, \$175, \$174, \$189, \$206, \$216, \$226, and \$233, for 1994 to 2008, respectively.
- u. A temporary Medicare-endorsed prescription drug discount card program was offered. For eligible beneficiaries voluntarily enrolling and paying up to \$30 annually, discounts on certain prescription drugs were available, as specified by card sponsors. Under a Transitional Assistance (TA) provision, drug-card eligible beneficiaries whose incomes did not exceed 135 percent of the federal poverty level and who did not have third-party prescription drug coverage were eligible for (1) financial assistance of up to \$600 per year for purchasing prescription drugs and (2) a subsidized enrollment fee for the discount card. Enrollment began May 2004, discount availability began June 2004, and the program phases out during 2006, as full Part D became available in January 2006.
- v. The 2006 out-of-pocket threshold of \$3,600 is equivalent to total covered drug costs of \$5,100. The 2007 out-of-pocket threshold of \$3,850 is equivalent to total covered drug costs of \$5,451.25. The 2008 out-of-pocket threshold of \$4,050 is equivalent to total covered drug costs of \$5,726.25.
- w. See footnote f. As of this writing, it is estimated that the average enrollee premium for basic Part D coverage, which reflects the specific plan-by-plan premiums and the actual number of beneficiaries in each plan, was about \$23 in 2006, about \$22 in 2007, and will be about \$25 in 2008.
- x. See footnote g. The 2008 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" in this *Supplement*, page 41. The analogous amounts for 2007 are shown on page 41 of the 2006 *Supplement*.
- y. 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 footnotes g and x), the government amounts are supposed to be reduced accordingly.

CONTACT: Sol Mussey (410) 786-6386.

## 2.C Medicaid: History of Provisions

**Table 2.C2—Federal medical assistance percentage and enhanced federal medical assistance percentage, by state or other area, 2006–2008**

State or area	Federal medical assistance percentage <sup>a</sup>			Enhanced federal medical assistance percentage <sup>b</sup>		
	2006 <sup>c</sup>	2007 <sup>d</sup>	2008 <sup>e</sup>	2006 <sup>c</sup>	2007 <sup>d</sup>	2008 <sup>e</sup>
Alabama	69.51	68.85	67.62	78.66	78.20	77.33
Alaska <sup>f</sup>	57.58	57.58	52.48	70.31	70.31	66.74
Arizona	66.98	66.47	66.20	76.89	76.53	76.34
Arkansas	73.77	73.37	72.94	81.64	81.36	81.06
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	50.09	50.00	50.00	65.06	65.00	65.00
District of Columbia <sup>g</sup>	70.00	70.00	70.00	79.00	79.00	79.00
Florida	58.89	58.76	56.83	71.22	71.13	69.78
Georgia	60.60	61.97	63.10	72.42	73.38	74.17
Hawaii	58.81	57.55	56.50	71.17	70.29	69.55
Idaho	69.91	70.36	69.87	78.94	79.25	78.91
Illinois	50.00	50.00	50.00	65.00	65.00	65.00
Indiana	62.98	62.61	62.69	74.09	73.83	73.88
Iowa	63.61	61.98	61.73	74.53	73.39	73.21
Kansas	60.41	60.25	59.43	72.29	72.18	71.60
Kentucky	69.26	69.58	69.78	78.48	78.71	78.85
Louisiana	69.79	69.69	72.47	78.85	78.78	80.73
Maine	62.90	63.27	63.31	74.03	74.29	74.32
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	56.59	56.38	58.10	69.61	69.47	70.67
Minnesota	50.00	50.00	50.00	65.00	65.00	65.00
Mississippi	76.00	75.89	76.29	83.20	83.12	83.40
Missouri	61.93	61.60	62.42	73.35	73.12	73.69
Montana	70.54	69.11	68.53	79.38	78.38	77.97
Nebraska	59.68	57.93	58.02	71.78	70.55	70.61
Nevada	54.76	53.93	52.64	68.33	67.75	66.85
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	71.15	71.93	71.04	79.81	80.35	79.73
New York	50.00	50.00	50.00	65.00	65.00	65.00
North Carolina	63.49	64.52	64.05	74.44	75.16	74.84
North Dakota	65.85	64.72	63.75	76.10	75.30	74.63
Ohio	59.88	59.66	60.79	71.92	71.76	72.55
Oklahoma	67.91	68.14	67.10	77.54	77.70	76.97
Oregon	61.57	61.07	60.86	73.10	72.75	72.60
Pennsylvania	55.05	54.39	54.08	68.54	68.07	67.86
Rhode Island	54.45	52.35	52.51	68.12	66.65	66.76
South Carolina	69.32	69.54	69.79	78.52	78.68	78.85
South Dakota	65.07	62.92	60.03	75.55	74.04	72.02
Tennessee	63.99	63.65	63.71	74.79	74.56	74.60
Texas	60.66	60.78	60.53	72.46	72.55	72.37
Utah	70.76	70.14	71.63	79.53	79.10	80.14
Vermont	58.49	58.93	59.03	70.94	71.25	71.32
Virginia	50.00	50.00	50.00	65.00	65.00	65.00
Washington	50.00	50.12	51.52	65.00	65.08	66.06
West Virginia	72.99	72.82	74.25	81.09	80.97	81.98
Wisconsin	57.65	57.47	57.62	70.36	70.23	70.33
Wyoming	54.23	52.91	50.00	67.96	67.04	65.00

(Continued)

**Table 2.C2—Federal medical assistance percentage and enhanced federal medical assistance percentage, by state or other area, 2006–2008—Continued**

State or area	Federal medical assistance percentage <sup>a</sup>			Enhanced federal medical assistance percentage <sup>b</sup>		
	2006 <sup>c</sup>	2007 <sup>d</sup>	2008 <sup>e</sup>	2006 <sup>c</sup>	2007 <sup>d</sup>	2008 <sup>e</sup>
Outlying areas						
American Samoa <sup>h</sup>	50.00	50.00	50.00	65.00	65.00	65.00
Guam <sup>h</sup>	50.00	50.00	50.00	65.00	65.00	65.00
Northern Mariana Islands <sup>h</sup>	50.00	50.00	50.00	65.00	65.00	65.00
Puerto Rico <sup>h</sup>	50.00	50.00	50.00	65.00	65.00	65.00
Virgin Islands <sup>h</sup>	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.

- a. 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.
- b. 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 is limited to no more than 85 percent.
- c. Effective October 1, 2005, through September 30, 2006.
- d. Effective October 1, 2006, through September 30, 2007.
- e. Effective October 1, 2007, through September 30 2008. These percentages may change for some states pending comments received on implementation of Section 6503(b) of the Deficit Reduction Act.
- f. The revised federal medical assistance percentages and enhanced federal medical assistance percentages for Alaska for fiscal years 2006 and 2007 have been calculated pursuant to section 6053(a) of the Deficit Reduction Act. These revised percentages replace the percentages previously published for fiscal years 2006 and 2007.
- g. 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.
- h. 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.

## 2.F SSA Administrative Data: Offices and Staff

**Table 2.F1—Number of SSA offices, 2006**

Office	Number
Headquarters (Baltimore, Maryland)	1
Regional offices <sup>a</sup>	10
Field offices <sup>b</sup>	1,318
Level 1	620
Level 2	654
Resident stations	44
Teleservice centers <sup>c</sup>	35
Program service centers <sup>d</sup>	6
Data operations center <sup>e</sup>	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. In December 1997, the field offices were redesignated as Level 1, 2, or resident stations depending on the characteristics of the facility, service area, and other conditions.
- c. The New Orleans teleservice center closed in August 2005.
- 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: Ron Hippler for SSA data (410) 965-4311 and Amy Prether for Office of Disability Adjudication and Review data (703) 605-7610.



2.F SSA Administrative Data: Offices and Staff

**Table 2.F2—Number of SSA employees and percentage with selected characteristics by grade, September 30, 2006**

Characteristic	All grade levels	GS 1–4	GS 5–8	GS 9–12	GS 13–15	SES
	<i>Number</i>					
Total <sup>a</sup>	60,797	412	16,744	32,655	9,409	141
	<i>Percentage of total</i>					
Women	70.0	66.3	79.8	72.1	54.5	38.3
Minorities	46.7	60.2	58.6	46.5	30.0	27.7
Black	28.3	52.2	36.6	26.9	19.8	19.1
Hispanic	13.0	4.9	16.7	13.6	6.0	7.1
Asian/Pacific Islander	4.2	2.7	4.2	4.7	3.2	0
American Indian/Alaska Native	1.3	0.5	1.2	1.4	1.0	1.4
Employees with targeted disabilities	2.2	16.5	4.2	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: Nelson Izquierdo (410) 965-4364.

**Table 2.F3—Number of work years, fiscal years 1995–2006**

Year	Full-time permanent staff <sup>a</sup>	Total work years <sup>b</sup>
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	<sup>c</sup> 66,154
2005	63,696	<sup>d</sup> 68,026
2006	61,692	66,878

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: Thomas Sutton (410) 965-4670.

## 2.F SSA Administrative Data: Claims Workloads

**Table 2.F4—Number of Old-Age and Survivors Insurance claims, fiscal year 2006 (in thousands)**

Workload	Total	Worker	Family members and survivors
Received	3,755.3	2,247.4	1,507.9
Processed <sup>a</sup>	3,789.3	2,258.7	1,530.6

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 Fitzgerald (410) 966-8673.

**Table 2.F5—Number of Disability Insurance claims, fiscal year 2006 (in thousands)**

Workload	Total	Worker	Family members and survivors
Received	2,531.6	2,268.7	262.9
Processed <sup>a</sup>	2,582.5	2,314.2	268.3

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 Fitzgerald (410) 966-8673.

**Table 2.F6—Number of Supplemental Security Income claims, fiscal year 2006 (in thousands)**

Workload	Total	Aged	Blind or disabled
Received	2,578.5	257.5	2,321.0
Processed <sup>a</sup>	2,568.0	257.6	2,310.4

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 Fitzgerald (410) 966-8673.

Table 2.F7—Accuracy rates and use of 800 telephone number, fiscal years 2002–2006

Item	2002	2003	2004	2005	2006
<i>Accuracy rates (percent)</i>					
OASI payments					
Payment review/stewardship results					
Excess payments	99.9	99.9	99.7	99.5	99.7
Underpayments	99.9	99.9	99.9	99.8	99.9
SSI payments					
Payment review/stewardship results					
Excess payments	93.4	93.9	93.6	93.6	92.1
Underpayments	98.6	98.8	98.7	98.6	97.8
Disability Insurance benefits <sup>a</sup>					
Initial claims	94.2	93.3	93.7	92.0	93.4
Allowances	97.1	96.6	96.5	90.2	96.1
Denials	92.4	91.5	92.0	93.5	92.0
Reconsideration	90.5	90.9	90.6	91.1	91.2
Reversals of denials	95.9	96.6	96.5	95.4	96.2
Affirmations of denials	89.4	89.9	89.6	90.3	90.5
<i>National 800 number network (1-800-772-1213)</i>					
Number of calls received (millions)	62.3	64.0	67.2	67.2	66.4
Average time calls answered (minutes)	4.7	3.8	4.2	4.9	4.6

SOURCES: Social Security Administration, Office of Quality Performance and Office of Central Operations.

a. Represents cases free of decisional and documentation errors.

CONTACT: Ron Mihalko (410) 965-0801 or John Hebert (410) 965-3915.

## 2.F SSA Administrative Data: Hearings and Appeals

**Table 2.F8—Workload of SSA’s Administrative Law Judges (ALJs), fiscal years 2004–2006**

Item	2004	2005	2006
Number of ALJs	944	986	1,018
Average monthly hearing dispositions per ALJ	50	51	46
Average hearings pending per ALJ	607	628	644

SOURCES: Social Security Administration, Office of Disability Adjudication and Review. Actual data from the Key Workload Indicator Report.

NOTE: Data based on Administrative Law Judges’ availability; data exclude Regional Chief ALJs.

CONTACT: Sybil Wolfe (703) 605-8772.

**Table 2.F9—Number of hearing level receipts, dispositions, and end-of-year pending cases, fiscal years 2005–2006**

Program	Hearing level receipts		Hearing level dispositions		End-of-year pending cases	
	2005 <sup>a</sup>	2006	2005 <sup>a</sup>	2006	2005	2006
Total	652,011	559,197	605,003	563,220	711,284	715,568
OASI	2,236	2,154	2,332	2,310	3,365	3,068
Disability						
DI	212,078	204,590	189,349	198,094	242,545	242,253
SSI	158,648	143,107	141,427	148,374	198,870	195,737
DI and SSI	218,960	208,119	186,251	210,200	263,384	274,510
Medicare (Parts A and B and adversarial)	60,089	1,227	85,644	4,242	3,120	0
Black Lung	0	0	0	0	0	0

SOURCES: Social Security Administration, Office of Disability Adjudication and Review. Actual data from the Key Workload Indicator Report.

a. Revised data.

CONTACT: Sybil Wolfe (703) 605-8772.

**Table 2.F11—Number of SSA Appeals Council cases, fiscal years 2004–2006**

Cases	2004	2005 <sup>a</sup>	2006
Beginning-of-year pending	51,072	45,911	42,815
Receipts	92,540	90,987	94,755
Dispositions	97,701	94,083	93,538
End-of-year pending	45,911	42,815	44,032

SOURCES: Social Security Administration, Office of Disability Adjudication and Review. Actual data from the Key Workload Indicator Report.

a. Revised data.

CONTACT: Sybil Wolfe (703) 605-8772.

## **Section 3. Social Welfare and the Economy**

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<b>Employment and Earnings</b>	<b>3.1</b>
<b>Interprogram Data</b>	<b>3.3</b>
<b>Poverty</b>	<b>3.13</b>



**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 1938–2009**

Effective date	Minimum hourly wage for workers in jobs first covered by—				Production workers in manufacturing <sup>a</sup>	
	1938 act <sup>b</sup> (dollars)	1961 amendments <sup>c</sup> (dollars)	1966 and subsequent amendments <sup>d</sup>		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 <sup>e</sup>	3.80	3.80	3.80	3.80	10.83	40.8
1991 <sup>e</sup>	4.25	4.25	4.25	4.25	11.18	40.7
1992 <sup>e</sup>	4.25	4.25	4.25	4.25	11.46	41.0
1993 <sup>e</sup>	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 <sup>e</sup>	4.75	4.75	4.75	4.75	12.77	41.6
September 1, 1997 <sup>e</sup>	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 1938–2009—Continued**

Effective date	Minimum hourly wage for workers in jobs first covered by—				Production workers in manufacturing <sup>a</sup>	
	1938 act <sup>b</sup> (dollars)	1961 amendments <sup>c</sup> (dollars)	1966 and subsequent amendments <sup>d</sup>		Average gross hourly earnings (dollars)	Average weekly hours
			Nonfarm (dollars)	Farm (dollars)		
January 1						
1998 <sup>e</sup>	5.15	5.15	5.15	5.15	13.45	41.4
1999 <sup>e</sup>	5.15	5.15	5.15	5.15	13.85	41.4
2000 <sup>e</sup>	5.15	5.15	5.15	5.15	14.32	41.3
2001 <sup>e</sup>	5.15	5.15	5.15	5.15	14.76	40.3
2002 <sup>e</sup>	5.15	5.15	5.15	5.15	15.29	40.5
2003 <sup>e</sup>	5.15	5.15	5.15	5.15	15.74	40.4
2004 <sup>e</sup>	5.15	5.15	5.15	5.15	16.14	40.8
2005 <sup>e</sup>	5.15	5.15	5.15	5.15	16.56	40.7
2006 <sup>e</sup>	5.15	5.15	5.15	5.15	16.80	41.1
2007 <sup>e,f</sup>	5.85	5.85	5.85	5.85	--	--
2008 <sup>e,g</sup>	6.55	6.55	6.55	6.55	--	--
2009 <sup>e,h</sup>	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. Effective July 24, 2009.

CONTACT: Greg Diez (410) 965-0153.



**Table 3.C3—Contributions to the Social Security and Medicare trust funds, by program and source, selected years 1965–2006 (in millions of dollars)**

Program and source	1965	1970	1975	1980	1985	1995	2000	2002	2003	2004	2005	2006
<b>Social Security trust funds</b>												
Old-Age and Survivors Insurance <sup>a</sup>	16,017	30,257	56,815	103,456	178,010	309,906	432,977	468,107	468,574	486,726	520,706	550,414
Employer	7,618	14,489	27,184	49,731	83,682	143,978	200,431	215,897	217,675	223,311	241,018	253,705
Employee	7,440	14,204	26,947	49,436	83,400	143,335	198,736	215,039	216,222	222,118	239,163	251,813
Self-employed	959	1,564	2,684	4,289	7,720	17,103	22,216	24,262	22,179	26,703	26,682	29,269
Taxation of benefits	...	...	...	...	3,208	5,490	11,594	12,909	12,497	14,593	13,843	15,628
Disability Insurance <sup>a</sup>	1,188	4,481	7,444	13,255	17,204	54,695	71,813	78,202	78,386	81,287	87,150	92,038
Employer	564	2,154	3,562	6,307	8,119	25,665	33,971	36,655	36,962	37,922	40,929	43,081
Employee	551	2,117	3,530	6,254	8,087	25,545	33,701	36,503	36,716	37,720	40,614	42,760
Self-employed	73	210	352	694	776	3,144	3,420	4,114	3,764	4,534	4,534	4,967
Taxation of benefits	...	...	...	...	222	341	721	930	944	1,111	1,073	1,230
<b>Medicare trust funds</b>												
Hospital Insurance <sup>a</sup>	...	4,880	11,510	23,866	47,173	103,301	154,520	162,650	159,164	166,977	182,565	194,238
Employer	...	2,379	5,578	11,591	22,613	45,839	67,526	71,334	69,885	72,760	80,159	84,417
Employee	...	2,332	5,530	11,518	22,549	45,852	67,526	71,334	69,885	72,760	80,159	84,417
Self-employed	...	169	395	739	1,970	6,743	9,299	10,040	9,472	10,964	11,065	12,439
Voluntarily enrolled <sup>b</sup>	...	...	7	18	41	954	1,382	1,626	1,604	1,915	2,416	2,645
Taxation of benefits	...	...	...	...	...	3,913	8,787	8,316	8,318	8,577	8,765	10,319
Supplementary Medical Insurance <sup>a,c</sup>	...	1,096	1,917	3,011	5,613	19,717	20,556	25,066	27,402	31,435	37,535	42,853
Aged	...	1,096	1,759	2,707	5,105	17,651	17,892	21,610	23,546	26,737	31,722	36,346
Disabled	...	...	158	304	508	2,066	2,664	3,456	3,856	4,699	5,813	6,507

SOURCE: Department of the Treasury.

NOTE: ... = not applicable.

- 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.

CONTACT: Jeff Kunkel (410) 965-3013.

### 3.C Interprogram Data

**Table 3.C4—Average monthly amount of Social Security and Supplemental Security Income, December 1950–2006 (in current and 2006 dollars)**

Year	Average monthly Social Security benefit in current-payment status				Average monthly Supplemental Security Income amount for—		Consumer price index <sup>a</sup>
	Retired workers		Widowed mother or father and 2 children		Aged recipients <sup>b</sup>		
	Current dollars	2006 dollars	Current dollars	2006 dollars	Current dollars	2006 dollars	
1950	43.86	354.04	93.90	757.96	43.05	347.50	25.0
1951	42.14	320.90	93.80	714.30	44.55	339.25	26.5
1952	49.25	372.23	106.00	801.15	48.80	368.83	26.7
1953	51.10	383.35	111.90	839.46	48.90	366.84	26.9
1954	59.14	446.98	130.50	986.33	48.70	368.08	26.7
1955	61.90	466.10	135.40	1,019.54	50.05	376.87	26.8
1956	63.09	461.29	141.00	1,030.93	53.25	389.34	27.6
1957	64.58	458.88	146.30	1,039.55	55.50	394.36	28.4
1958	66.35	463.30	151.70	1,059.28	56.95	397.66	28.9
1959	72.78	499.56	170.70	1,171.68	56.70	389.19	29.4
1960	74.04	501.38	188.00	1,273.10	58.90	398.86	29.8
1961	75.65	508.87	189.30	1,273.36	57.60	387.46	30.0
1962	76.19	505.76	190.70	1,265.90	61.55	408.58	30.4
1963	76.88	502.08	192.50	1,257.17	62.80	410.13	30.9
1964	77.57	501.72	193.40	1,250.90	63.65	411.69	31.2
1965	83.92	532.55	219.80	1,394.83	63.10	400.43	31.8
1966	84.35	517.38	221.90	1,361.08	68.05	417.40	32.9
1967	85.37	508.19	224.40	1,335.81	70.15	417.59	33.9
1968	98.86	561.97	257.10	1,461.49	69.55	395.36	35.5
1969	100.40	537.42	255.80	1,369.24	73.90	395.57	37.7
1970	118.10	598.81	291.10	1,475.98	77.65	393.71	39.8
1971	132.17	648.95	320.00	1,571.19	77.50	380.52	41.1
1972	162.35	770.88	383.10	1,819.05	79.95	379.62	42.5
1973	166.42	726.92	391.00	1,707.87	76.15	332.62	46.2
1974	188.21	731.81	438.40	1,704.61	91.06	354.06	51.9
1975	207.18	753.31	468.60	1,703.85	90.93	330.62	55.5
1976	224.86	779.67	503.40	1,745.47	94.37	327.21	58.2
1977	243.00	789.65	546.60	1,776.23	96.62	313.98	62.1
1978	263.20	784.55	591.90	1,764.33	100.43	299.36	67.7
1979	294.30	774.31	655.00	1,723.32	122.67	322.75	76.7
1980	341.40	798.31	759.20	1,775.28	128.20	299.78	86.3
1981	385.97	828.60	858.00	1,841.96	137.81	295.85	94.0
1982	419.30	866.95	885.50	1,830.88	145.69	301.23	97.6
1983	440.77	878.06	923.00	1,838.71	157.89	314.53	101.3
1984	460.57	882.65	948.30	1,817.35	157.88	302.57	105.3
1985	478.62	883.67	981.50	1,812.14	164.26	303.27	109.3
1986	488.44	892.01	994.00	1,815.29	173.66	317.15	110.5
1987	512.65	896.47	1,032.30	1,805.18	180.64	315.89	115.4
1988	536.77	898.92	1,070.40	1,792.59	188.23	315.23	120.5
1989	566.85	907.14	1,120.04	1,792.42	198.81	318.16	126.1
1990	602.56	908.79	1,177.70	1,776.23	212.66	320.74	133.8
1991	629.32	920.93	1,216.76	1,780.58	221.30	323.85	137.9
1992	652.64	928.14	1,252.40	1,781.07	227.39	323.38	141.9
1993	674.06	932.96	1,282.60	1,775.23	236.52	327.36	145.8
1994	697.34	940.03	1,328.40	1,790.72	242.54	326.95	149.7
1995	719.80	946.29	1,365.50	1,795.17	250.65	329.52	153.5
1996	744.96	947.87	1,450.60	1,845.72	260.75	331.77	158.6
1997	774.84	969.39	1,502.60	1,879.88	268.46	335.87	161.3
1998	779.69	959.98	1,537.70	1,893.28	277.45	341.61	163.9
1999	804.30	964.40	1,590.40	1,906.97	289.19	346.75	168.3

(Continued)

**Table 3.C4—Average monthly amount of Social Security and Supplemental Security Income, December 1950–2006 (in current and 2006 dollars)—Continued**

Year	Average monthly Social Security benefit in current-payment status				Average monthly Supplemental Security Income amount for—		Consumer price index <sup>a</sup>
	Retired workers		Widowed mother or father and 2 children		Aged recipients <sup>b</sup>		
	Current dollars	2006 dollars	Current dollars	2006 dollars	Current dollars	2006 dollars	
2000	844.48	979.40	1,675.40	1,943.08	299.69	347.57	174.0
2001	874.44	998.65	1,755.10	2,004.41	314.22	358.85	176.7
2002	895.00	998.40	1,812.10	2,021.46	330.04	368.17	180.9
2003	922.08	1,009.64	1,880.97	2,059.58	342.28	374.78	184.3
2004	954.89	1,012.59	1,952.80	2,070.81	350.53	371.71	190.3
2005	1,002.00	1,027.46	2,061.30	2,113.67	360.25	369.40	196.8
2006	1,044.40	1,044.40	2,146.70	2,146.70	373.05	373.05	201.8

SOURCES: Social Security Administration, Master Beneficiary Record and Supplemental Security Record, 100 percent data.

NOTE: Effective 2006, Temporary Assistance for Needy Families (TANF) data no longer reported in the *Supplement*.

a. Data from Bureau of Labor Statistics, consumer price index for all urban consumers (CPI-U) for all items (1982–1984 = 100).

b. For 1940–1973, 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 1940–2006, selected years**

Year and state	Population aged 65 or older receiving—						Persons receiving both OASDI and SSI as a percentage of—	
	OASDI		SSI <sup>a</sup>		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								
United States	919	...	53	...	30	942	3.3	57.1
Alabama	920	29	57	10	45	931	4.9	79.0
Alaska	897	36	66	6	39	924	4.3	59.2
Arizona	825	49	29	30	17	837	2.1	58.8
Arkansas	932	24	49	14	40	940	4.3	82.6
California	824	50	132	1	65	891	7.9	49.5
Colorado	896	37	29	32	16	908	1.8	57.0
Connecticut	942	14	27	36	13	956	1.3	47.6
Delaware	925	27	21	41	13	933	1.5	63.8
District of Columbia	703	51	58	9	35	727	4.9	59.2
Florida	828	48	46	16	24	851	2.8	51.0
Georgia	888	41	55	12	40	903	4.5	71.8
Hawaii	854	47	47	15	22	879	2.6	46.9
Idaho	950	10	18	43	14	955	1.4	73.8
Illinois	898	35	38	24	16	919	1.8	42.9
Indiana	955	8	16	49	11	960	1.1	68.4
Iowa	960	4	16	48	12	965	1.2	71.6
Kansas	933	23	18	45	12	940	1.2	64.4
Kentucky	919	30	63	8	47	935	5.1	74.8
Louisiana	890	40	66	5	50	907	5.6	74.6
Maine	956	6	28	33	23	961	2.4	81.1
Maryland	863	46	38	23	18	883	2.1	47.4
Massachusetts	902	34	56	11	31	927	3.4	54.6
Michigan	961	3	29	31	16	973	1.7	57.2
Minnesota	939	17	26	37	12	953	1.3	46.3
Mississippi	912	33	84	3	68	929	7.4	80.5

(Continued)

**Table 3.C5—Population aged 65 or older receiving Social Security (OASDI) benefits, Supplemental Security Income (SSI) payments, or both, by state, December 1940–2006, selected years—Continued**

Year and state	Population aged 65 or older receiving—						Persons receiving both OASDI and SSI as a percentage of—	
	OASDI		SSI <sup>a</sup>		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				
2006 (cont.)								
Missouri	938	20	26	38	18	946	1.9	70.1
Montana	939	18	18	44	14	943	1.5	76.6
Nebraska	936	21	16	47	11	941	1.2	69.5
Nevada	892	38	32	28	18	906	2.1	57.5
New Hampshire	956	7	11	51	7	960	0.8	66.6
New Jersey	914	32	45	18	20	938	2.2	45.4
New Mexico	878	43	64	7	44	898	5.0	68.9
New York	866	45	90	2	42	914	4.8	46.7
North Carolina	944	12	45	19	35	954	3.7	77.4
North Dakota	954	9	19	42	15	959	1.5	75.3
Ohio	928	26	24	39	14	938	1.5	58.4
Oklahoma	931	25	33	26	24	939	2.6	73.5
Oregon	945	11	27	35	15	956	1.6	57.2
Pennsylvania	940	16	32	27	19	953	2.0	58.7
Rhode Island	938	19	49	13	31	957	3.3	62.1
South Carolina	924	28	44	20	35	934	3.7	77.8
South Dakota	967	2	28	34	19	976	1.9	67.4
Tennessee	936	22	46	17	35	947	3.7	75.9
Texas	881	42	69	4	47	904	5.3	67.8
Utah	874	44	17	46	9	882	1.0	50.9
Vermont	959	5	30	29	24	964	2.5	80.3
Virginia	890	39	39	22	24	905	2.7	61.0
Washington	916	31	35	25	14	938	1.5	38.3
West Virginia	940	15	44	21	31	954	3.3	69.8
Wisconsin	971	1	22	40	14	979	1.5	64.5
Wyoming	944	13	14	50	11	947	1.2	80.2

SOURCES: Social Security Administration, Master Beneficiary Record and Supplemental Security Record (Characteristic Extract Record format), and the U.S. 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.

CONTACT: Stella M. Coleman (410) 965-0157.

### 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 2006**

Type of benefit	All OASDI beneficiaries <sup>a</sup>	Number receiving SSI			Percentage of all OASDI beneficiaries		
		Total	Aged	Blind and disabled	Total	Aged	Blind and disabled
Total	49,122,624	2,523,827	683,003	1,840,824	5.1	1.4	3.7
Retirement	33,944,684	1,061,343	568,030	493,313	3.1	1.7	1.5
Workers aged 65 or older	28,135,811	788,273	505,977	282,296	2.8	1.8	1.0
Men	14,444,761	322,561	201,629	120,932	2.2	1.4	0.8
Women	13,691,050	465,712	304,348	161,364	3.4	2.2	1.2
Workers aged 62–64	2,840,334	44,545	0	44,545	1.6	0	1.6
Men	1,424,421	27,499	0	27,499	1.9	0	1.9
Women	1,415,913	17,046	0	17,046	1.2	0	1.2
Wives and husbands	2,478,599	133,624	62,038	71,586	5.4	2.5	2.9
Aged 65 or older	2,197,942	121,847	62,038	59,809	5.5	2.8	2.7
Aged 62–64	241,679	10,835	0	10,835	4.5	0	4.5
Under age 62 with children	38,978	942	0	942	2.4	0	2.4
Disabled adult children	192,122	90,803	15	90,788	47.3	<sup>b</sup>	47.3
Aged 65 or older	1,110	473	15	458	42.6	1.4	41.3
Aged 18–64	191,012	90,330	0	90,330	47.3	<sup>b</sup>	47.3
Children under age 18 and students aged 18–19	297,818	4,098	0	4,098	1.4	0	1.4
Survivors	6,565,824	424,707	113,657	311,050	6.5	1.7	4.7
Nondisabled widow(er)s	4,273,442	204,662	111,128	93,534	4.8	2.6	2.2
Aged 65 or older	3,833,233	198,729	111,128	87,601	5.2	2.9	2.3
Aged 60–64	440,209	5,933	0	5,933	1.3	0	1.3
Disabled widow(er)s	220,178	35,557	6	35,551	16.1	<sup>b</sup>	16.1
Widowed mothers and fathers	171,453	3,960	36	3,924	2.3	<sup>b</sup>	2.3
Parents	1,889	93	80	13	4.9	4.2	0.7
Disabled adult children	512,596	157,820	2,407	155,413	30.8	0.5	30.3
Aged 65 or older	68,550	21,138	2,407	18,731	30.8	3.5	27.3
Aged 18–64	444,046	136,682	0	136,682	30.8	0	30.8
Children under age 18 and students aged 18–19	1,386,266	22,615	0	22,615	1.6	0	1.6
Disability	8,612,116	1,037,777	1,316	1,036,461	12.1	<sup>b</sup>	12.0
Workers	6,806,918	925,583	219	925,364	13.6	<sup>b</sup>	13.6
Men	3,643,121	396,462	89	396,373	10.9	<sup>b</sup>	10.9
Women	3,163,797	529,121	130	528,991	16.7	<sup>b</sup>	16.7
Wives and husbands	153,470	10,824	1,097	9,727	7.1	0.7	6.3
Aged 65 or older	29,957	3,843	1,097	2,746	12.8	3.7	9.2
Aged 62–64	41,510	2,176	0	2,176	5.2	0	5.2
Under age 62 with children	82,003	4,805	0	4,805	5.9	0	5.9
Disabled adult children aged 18–64	71,878	49,062	0	49,062	68.3	0	68.3
Children under age 18 and students aged 18–19	1,579,850	52,308	0	52,308	3.3	0	3.3

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Social Security is the Old-Age, Survivors, and Disability Insurance (OASDI) program.

- a. Includes special age-72 beneficiaries.
- b. Less than 0.05 percent.

CONTACT: Shirley Turpin (410) 965-0181.

**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 1978–2006**

Year	Unduplicated total <sup>a</sup>	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	<sup>b</sup> 1,260,981	486,145
1979	4,662,528	3,419,624	2,870,590	419,201	129,833	1,726,553	<sup>b</sup> 1,242,904	483,649
1980	4,662,546	3,418,434	2,858,680	432,174	127,580	1,730,847	<sup>b</sup> 1,244,112	486,735
1981	4,570,071	3,340,701	2,776,519	442,592	121,590	1,702,895	<sup>b</sup> 1,229,370	473,525
1982	4,366,314	3,169,449	2,603,599	449,478	116,372	1,655,279	<sup>b</sup> 1,196,865	458,414
1983	4,367,241	3,143,111	2,569,029	462,491	111,591	1,699,774	<sup>b</sup> 1,224,130	475,644
1984	4,460,188	3,183,618	2,596,516	477,951	109,151	1,780,459	<sup>b</sup> 1,276,570	503,889
1985	4,591,316	3,258,200	2,656,638	494,557	107,005	1,879,168	<sup>b</sup> 1,333,116	546,052
1986	4,812,143	3,346,603	2,728,463	511,166	106,974	2,010,458	<sup>b</sup> 1,465,540	544,918
1987	4,904,785	3,416,529	2,785,859	524,388	106,282	2,118,710	<sup>b</sup> 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	<sup>c</sup> 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

SOURCE: 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.

### 3.C Interprogram Data

**Table 3.C7a—Number of persons aged 15 or older reporting only one race and having Social Security benefits or Supplemental Security Income in March 2007, by sex, age, and race, and average annual benefit in 2006**

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						
<b>Social Security beneficiaries (thousands)</b>								
Total	41,185	40,781	35,557	3,981	226	971	48	
Sex								
Male	17,787	17,590	15,414	1,651	101	412	a	
Female	23,398	23,191	20,142	2,329	124	559	a	
Age								
15–54	4,536	4,462	3,535	788	52	77	a	
55–64	5,525	5,456	4,564	716	41	130	a	
65–74	15,787	15,627	13,694	1,433	84	400	a	
75 or older	15,337	15,236	13,764	1,043	49	364	a	
<b>Supplemental Security Income recipients (thousands)</b>								
Total	4,992	4,896	3,340	1,236	95	222	3	
Sex								
Male	1,959	1,922	1,336	468	29	88	a	
Female	3,033	2,974	2,004	768	66	134	a	
Age								
15–54	2,969	2,900	2,005	771	47	75	a	
55–64	997	982	695	226	25	35	a	
65–74	526	519	326	138	11	43	a	
75 or older	500	495	313	101	11	70	a	
<b>Average annual benefit in 2006 (dollars)</b>								
Social Security	11,420	11,424	11,595	10,211	9,548	10,634	a	
Supplemental Security Income	6,406	6,408	6,417	6,422	6,080	6,340	a	

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2007 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 U.S. Census Bureau, *Current Population Reports*, Series P-60.

Totals do not necessarily equal the sum of rounded components.

a. Fewer than 75,000 weighted cases.

CONTACT: Alberta Presberry (410) 966-8473.



**Table 3.C7b—Number of persons aged 15 or older reporting one or more races and having Social Security benefits or Supplemental Security Income in March 2007, by sex, age, and race, and average annual benefit in 2006**

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					
<b>Social Security beneficiaries (thousands)</b>								
Total <sup>a</sup>	41,185	40,781	404	35,920	4,047	570	1,003	66
Sex								
Male	17,787	17,590	197	15,592	1,680	268	428	b
Female	23,398	23,191	207	20,328	2,367	301	575	b
Age								
15–54	4,536	4,462	74	3,604	807	106	85	b
55–64	5,525	5,456	69	4,623	726	103	134	b
65–74	15,787	15,627	160	13,840	1,454	224	411	b
75 or older	15,337	15,236	101	13,853	1,060	136	373	b
<b>Supplemental Security Income recipients (thousands)</b>								
Total <sup>a</sup>	4,992	4,896	96	3,423	1,264	158	233	7
Sex								
Male	1,959	1,922	37	1,365	478	58	88	b
Female	3,033	2,974	59	2,058	786	101	145	b
Age								
15–54	2,969	2,900	70	2,063	794	88	86	b
55–64	997	982	15	711	228	38	35	b
65–74	526	519	7	333	141	17	43	b
75 or older	500	495	4	316	102	15	70	b
<b>Average annual benefit in 2006 (dollars)</b>								
Social Security	11,420	11,424	11,002	11,590	10,209	10,393	10,640	b
Supplemental Security Income	6,406	6,408	6,306	6,416	6,422	6,034	6,420	b

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2007 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 U.S. 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.

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 75,000 weighted cases.

CONTACT: Alberta Presberry (410) 966-8473.

### 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 2007, by age and sex, and average annual benefit in 2006**

Age	All beneficiaries (thousands)			Hispanic origin <sup>a</sup> (thousands)			Hispanic origin as a percentage of all beneficiaries <sup>a</sup>		
	Total	Men	Women	Total	Men	Women	Total	Men	Women
<b>Social Security beneficiaries</b>									
Total, all ages	41,185	17,787	23,398	2,612	1,131	1,482	6.3	6.4	6.3
15–34	1,404	684	720	175	79	96	12.5	11.6	13.3
35–44	1,115	488	628	105	39	66	9.4	8.1	10.5
45–54	2,017	930	1,087	166	77	90	8.3	8.2	8.3
55–64	5,525	2,467	3,058	408	184	224	7.4	7.4	7.3
65–74	15,787	7,239	8,548	1,007	435	572	6.4	6.0	6.7
75 or older	15,337	5,980	9,357	751	317	434	4.9	5.3	4.6
<b>Supplemental Security Income recipients</b>									
Total, all ages	4,992	1,959	3,033	827	333	494	16.6	17.0	16.3
15–34	1,132	533	599	177	81	96	15.6	15.2	16.0
35–44	766	295	471	109	35	74	14.3	11.9	15.8
45–54	1,071	425	646	147	72	76	13.8	16.8	11.7
55–64	997	421	576	178	76	102	17.9	18.0	17.8
65–74	526	171	354	120	38	82	22.8	22.0	23.2
75 or older	500	114	386	95	32	63	19.0	28.1	16.3
<b>Average annual benefit in 2006 (dollars)</b>									
Social Security	11,420	13,135	10,116	9,619	10,996	8,568	...	...	...
Supplemental Security Income	6,406	7,038	5,997	5,959	6,144	5,834	...	...	...

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2007 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 U.S. Census Bureau, *Current Population Reports*, Series P-60.

... = not applicable.

a. Persons of Hispanic origin may be of any race.

CONTACT: Alberta Presberry (410) 966-8473.

**Table 3.E1—Weighted average poverty thresholds for nonfarm families, by size, 1959–2006 (in dollars)**

Year	Unrelated individuals			Families								Annual average CPI <sup>a</sup>
				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

(Continued)

### 3.E Poverty

**Table 3.E1—Weighted average poverty thresholds for nonfarm families, by size, 1959–2006 (in dollars)—Continued**

Year	Unrelated individuals			Families								Annual average CPI <sup>a</sup>
				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						
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
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

SOURCE: U.S. Census Bureau, Current Population Survey.

NOTES: ... = not applicable.

Three technical changes in the definition of poverty are described in "Characteristics of the Population Below the Poverty Level, 1980," U.S. 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 consumer price index. The dollar thresholds for larger families beginning in 1980 are:

Year	9 persons or more		
	7 persons	8 persons	9 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

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.

CONTACT: Bernadette D. Proctor (301) 763-3213.

**Table 3.E2—Number and percentage of poor persons, by age, at end of selected years 1959–2005**

Age and family status <sup>a</sup>	1959	1970	1980	1985	1990 <sup>b</sup>	1995	2000	2004	2005
<b>Total population <sup>c</sup> (millions)</b>									
All ages	176.5	202.5	225.0	236.6	248.6	263.7	275.9	290.6	293.1
Children under 18 in families—	64.0	69.9	62.2	62.0	64.9	70.3	70.6	72.0	72.0
With male householder <sup>d</sup>	58.3	60.8	50.6	49.5	49.5	52.1	54.5	54.2	54.4
With female householder	5.7	9.0	11.5	12.5	15.4	18.2	16.1	17.8	17.6
18–54 <sup>e</sup>	81.0	94.9	116.3	125.2	132.3	140.7	147.4	152.8	153.6
55–64	15.5	18.4	21.7	22.1	21.3	21.1	23.8	29.5	31.0
65 or older	15.6	19.3	24.7	27.3	30.1	31.7	33.0	35.2	35.5
In families	11.9	13.4	16.7	18.4	20.1	21.1	22.3	23.8	23.8
Unrelated individuals	3.7	5.8	8.0	8.9	10.0	10.6	10.7	11.4	11.7
Men	1.2	1.4	1.7	2.0	2.3	2.7	2.9	3.3	3.4
Women	2.5	4.4	6.3	7.0	7.7	7.9	7.8	8.1	8.3
<b>Number poor <sup>c</sup> (millions)</b>									
All ages	39.5	25.3	29.3	33.1	33.6	36.4	31.1	37.0	36.9
Children under 18 in families—	17.2	10.5	11.1	12.5	13.3	14.4	11.1	12.4	12.3
With male householder <sup>d</sup>	13.1	5.7	5.2	5.8	5.3	5.6	4.9	5.1	5.0
With female householder	4.1	4.8	5.9	6.7	8.0	8.9	6.2	7.3	7.3
18–54 <sup>e</sup>	13.4	8.2	12.2	14.8	14.6	16.5	14.1	18.0	18.0
55–64	3.3	2.1	2.1	2.3	2.1	2.2	2.2	2.7	2.7
65 or older	5.5	4.7	3.9	3.5	3.7	3.3	3.4	3.5	3.6
In families	3.2	2.0	1.4	1.2	1.2	1.1	1.1	1.4	1.3
Unrelated individuals	2.3	2.7	2.4	2.3	2.5	2.3	2.2	2.1	2.3
Men	0.7	0.5	0.4	0.4	0.4	0.4	0.5	0.5	0.5
Women	1.6	2.2	2.0	1.9	2.1	1.9	1.7	1.6	1.7
<b>Percentage poor <sup>c</sup></b>									
All ages	22.4	12.6	13.0	14.0	13.5	13.8	11.3	12.7	12.6
Children under 18 in families—	26.9	15.0	17.9	20.1	20.5	20.5	15.7	17.3	17.1
With male householder <sup>d</sup>	22.4	9.3	10.4	11.7	10.7	10.7	8.9	9.5	9.2
With female householder	72.2	53.4	50.8	53.6	52.1	48.6	38.4	41.1	41.6
18–54 <sup>e</sup>	16.5	8.7	10.5	11.8	11.0	11.7	9.6	11.8	11.7
55–64	21.5	11.4	9.5	10.5	9.7	10.2	9.4	9.3	8.7
65 or older	35.2	24.6	15.7	12.6	12.2	10.5	10.2	9.8	10.1
In families	26.9	14.7	8.5	6.4	5.9	5.0	5.1	5.7	5.6
Unrelated individuals	61.9	47.1	30.6	25.6	24.8	21.4	20.8	18.3	19.5
Men	59.0	38.9	24.4	20.5	17.3	14.3	18.3	13.7	15.6
Women	63.3	49.7	32.3	27.0	26.9	23.8	21.8	20.2	21.1

SOURCES: U.S. Census Bureau, Current Population Survey, public-use file of the March 2006 Income Supplement. Data for 1970 and 1975 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 U.S. 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.

### 3.E Poverty

**Table 3.E3—Shares of money income from earnings and other sources for aged and nonaged families, 2005**

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 <sup>a</sup>	Total	Nonpoor	Poor <sup>a</sup>	Total	Nonpoor	Poor <sup>a</sup>	Total	Nonpoor	Poor <sup>a</sup>
Number of families and unrelated individuals (millions)	11.7	9.4	2.3	12.2	11.5	0.7	37.9	29.5	8.5	65.2	58.2	6.9
<b>Percentage receiving income of specified type<sup>b</sup></b>												
Earnings	16	19	2	44	45	17	80	93	38	93	97	63
Public program payments												
Social Security <sup>c</sup>	91	93	83	90	92	64	7	6	11	11	11	11
Supplemental Security Income	5	3	15	4	4	12	3	1	10	3	3	10
Other public assistance	2	2	2	3	3	8	9	8	12	12	10	23
Other programs <sup>d</sup>	4	5	2	7	7	3	5	6	2	9	9	7
Other sources												
Dividends, interest, rent	52	58	23	64	67	21	40	48	14	56	61	15
Employment-related pensions, alimony, annuities	40	48	8	50	53	10	6	7	3	16	16	15
<b>Percentage distribution of income, by type</b>												
Total percent	100	100	100	100	100	100	100	100	100	100	100	100
Earnings	19	20	1	38	38	12	88	89	51	90	90	66
Public program payments												
Social Security <sup>c</sup>	43	41	85	31	31	70	2	2	19	2	2	10
Supplemental Security Income	1	<sup>e</sup>	8	1	<sup>e</sup>	8	1	<sup>e</sup>	14	<sup>e</sup>	<sup>e</sup>	7
Other public assistance	<sup>e</sup>	<sup>e</sup>	<sup>e</sup>	<sup>e</sup>	<sup>e</sup>	3	2	1	9	1	1	9
Other programs <sup>d</sup>	2	2	1	1	1	1	1	1	2	1	1	2
Other sources												
Dividends, interest, rent	15	16	2	11	11	1	4	4	2	4	4	1
Employment-related pensions, alimony, annuities	21	22	3	17	17	5	3	3	3	3	3	5
Median income (dollars)	15,776	19,122	6,834	37,645	39,833	8,682	25,386	32,068	3,726	56,281	56,677	9,276

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2006 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 U.S. 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 2005. 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 0.05 percent.

CONTACT: Diane Wallace (410) 965-0165.

**Table 3.E4—Current living arrangements of persons aged 65 or older, by sex and poverty status, March 2006**

Living arrangement	Population (thousands)			Percentage distribution			Percentage officially poor
	Total	Poor	Nonpoor	Total	Poor	Nonpoor	
<b>All persons aged 65 or older</b>							
Total	35,505	3,603	31,901	100.0	100.0	100.0	10.1
Unrelated individuals	11,695	2,279	9,416	32.9	63.2	29.5	19.5
Family members	23,810	1,324	22,486	67.1	36.8	70.5	5.6
Householder or spouse	21,703	1,154	20,550	61.1	32.0	64.4	5.3
Other relative <sup>a</sup>	2,107	171	1,936	5.9	4.7	6.1	8.1
Poor by own income	964	142	821	2.7	4.0	2.6	14.8
Not poor by own income	1,143	28	1,115	3.2	0.8	3.5	2.5
<b>Men</b>							
Subtotal	15,185	1,113	14,072	42.8	30.9	44.1	7.3
Unrelated individuals	3,410	531	2,879	9.6	14.7	9.0	15.6
Family members	11,774	582	11,193	33.2	16.1	35.1	4.9
Householder	7,819	383	7,437	22.0	10.6	23.3	4.9
Spouse of householder	3,584	165	3,419	10.1	4.6	10.7	4.6
Other relative <sup>a</sup>	371	34	337	1.0	0.9	1.1	9.2
Poor by own income	164	30	134	0.5	0.8	0.4	18.2
Not poor by own income	207	4	203	0.6	0.1	0.6	2.0
<b>Women</b>							
Subtotal	20,320	2,490	17,830	57.2	69.1	55.9	12.3
Unrelated individuals	8,284	1,748	6,537	23.3	48.5	20.5	21.1
Family members	12,036	743	11,293	33.9	20.6	35.4	6.2
Householder, no husband present	1,792	254	1,539	5.0	7.0	4.8	14.2
Householder with husband present	2,810	104	2,706	7.9	2.9	8.5	3.7
Wife of householder	5,698	249	5,449	16.0	6.9	17.1	4.4
Other relative <sup>a</sup>	1,736	137	1,599	4.9	3.8	5.0	7.9
Poor by own income	800	113	687	2.3	3.1	2.2	14.1
Not poor by own income	936	24	912	2.6	0.7	2.9	2.6

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2006 Income Supplement.

NOTES: Living arrangements as of March 2006.

Poverty status in 2005 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.

For a discussion of standard errors of estimated numbers and percentages, see U.S. 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.

### 3.E Poverty

**Table 3.E6—Percentage distribution of aged families receiving Social Security benefits, by share of income from benefits and race, 2005**

Social Security share of money income for year <sup>a</sup>	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
<b>All races <sup>b</sup></b>								
Number (thousands)	11,680	9,408	2,272	...	12,565	11,763	803	...
Percent	100	100	100	19	100	100	100	6
No Social Security benefits	9	7	17	38	10	8	35	22
Some Social Security benefits	91	93	83	18	90	92	65	5
Less than one-fourth of income	10	12	1	2	21	22	2	0
One-fourth to one-half of income	17	21	2	3	24	25	3	1
One-half to three-fourths of income	18	21	7	7	18	19	6	2
Three-fourths or more of income	46	39	72	31	26	25	54	13
<b>White only</b>								
Number (thousands)	10,209	8,434	1,775	...	10,699	10,202	498	...
Percent	100	100	100	17	100	100	100	5
No Social Security benefits	8	6	17	36	9	7	35	19
Some Social Security benefits	92	94	83	16	91	93	65	3
Less than one-fourth of income	10	12	1	1	21	22	2	0
One-fourth to one-half of income	18	21	3	3	25	26	3	0
One-half to three-fourths of income	19	21	7	6	19	20	5	1
Three-fourths or more of income	45	39	73	28	26	25	55	10
<b>Black only</b>								
Number (thousands)	1,147	730	417	...	1,003	829	174	...
Percent	100	100	100	36	100	100	100	17
No Social Security benefits	12	9	16	51	17	13	36	37
Some Social Security benefits	88	91	84	34	83	87	64	13
Less than one-fourth of income	6	8	2	14	23	28	1	1
One-fourth to one-half of income	11	17	1	3	17	20	2	2
One-half to three-fourths of income	16	21	8	18	15	16	11	13
Three-fourths or more of income	55	46	72	48	28	24	49	30

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2006 Income Supplement.

NOTES: 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 Bureau of the Census, *Current Population Reports*, Series P-60.

... = not applicable.

a. Payments under Social Security program any time in 2005 to any family member as reported in the March 2006 Current Population Survey.

b. Includes other races.

CONTACT: Diane Wallace (410) 965-0165.



**Table 3.E8—Poverty guidelines for families of specified size, 1965–2007 (in dollars)**

Date of issuance <sup>a</sup>	1 person	2 persons	3 persons	4 persons	5 persons	6 persons	7 persons	8 persons	Increment <sup>b</sup>
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

(Continued)

### 3.E Poverty

**Table 3.E8—Poverty guidelines for families of specified size, 1965–2007 (in dollars)—Continued**

Date of issuance <sup>a</sup>	1 person	2 persons	3 persons	4 persons	5 persons	6 persons	7 persons	8 persons	Increment <sup>b</sup>
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
February 2005	9,570	12,830	16,090	19,350	22,610	25,870	29,130	32,390	3,260
February 2006	9,800	13,200	16,600	20,000	23,400	26,800	30,200	33,600	3,400
February 2007	10,210	13,690	17,170	20,650	24,130	27,610	31,090	34,570	3,480

SOURCE: Department of Health and Human Services, *Federal Register*, vol. 72, no. 15 (January 24, 2007), pp. 3147–3148.

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

Separate figures for Alaska and Hawaii reflect Office of Economic Opportunity administrative practice beginning in the 1966–1970 period. The U.S. 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.

- The guidelines are effective from the date of issuance (unless otherwise specified by a particular program using them).
- 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.

## **Section 4. Old-Age, Survivors, and Disability Insurance**

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<b>Trust Funds</b>	<b>4.1</b>
<b>Covered Workers</b>	<b>4.12</b>
<b>Insured Workers</b>	<b>4.36</b>



Table 4.A1—Old-Age and Survivors Insurance, selected years 1937–2006 (in millions of dollars)

Year	Receipts					Expenditures				Assets	
	Total	Net contributions <sup>a</sup>	Income from taxation of benefits	Net interest <sup>b</sup>	Payments from the general fund of the Treasury <sup>c</sup>	Total	Benefit payments <sup>d</sup>	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	<sup>e</sup> 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	<sup>e</sup> 8,725	35,842
1986	197,393	190,741	3,424	3,069	160	181,000	176,813	1,601	2,585	<sup>e</sup> 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 1937–2006 (in millions of dollars)—Continued**

Year	Receipts					Expenditures				Assets	
	Total	Net contributions <sup>a</sup>	Income from taxation of benefits	Net interest <sup>b</sup>	Payments from the general fund of the Treasury <sup>c</sup>	Total	Benefit payments <sup>d</sup>	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

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.

- a. 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.
- b. Net interest includes net profits or losses on marketable investments. Beginning in 1967, administrative expenses are charged to the trust fund on an estimated basis, with a final adjustment, including interest, made in the following fiscal year. The amounts of these interest adjustments are included in net interest. Beginning in October 1973, the figures shown include relatively small amounts of gifts to the fund. Figures for 1983–1986 reflect payments from a borrowing trust fund to a lending trust fund for interest on amounts owed under the interfund borrowing provisions. During 1983–1990, interest paid from the trust fund to the general fund of the Treasury on advance tax transfers is reflected. The amount shown for 1985 includes an interest adjustment of \$88 million on unnegotiated checks issued before April 1985.
- c. 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.
- d. 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.
- e. Amount equals total receipts less total expenditures, plus amounts borrowed or less amounts repaid under interfund borrowing provisions.
- f. Between -\$500,000 and \$500,000.

CONTACT: Jeff Kunkel (410) 965-3013.

Table 4.A2—Disability Insurance, 1957–2006 (in millions of dollars)

Year	Receipts					Expenditures				Assets	
	Total	Net contributions <sup>a</sup>	Income from taxation of benefits	Net interest <sup>b</sup>	Payments from the general fund of the Treasury <sup>c</sup>	Total	Benefit payments <sup>d</sup>	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	<sup>e</sup>	-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	<sup>f</sup> -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	<sup>f</sup> 2,363	6,321
1986	19,439	18,399	238	803	...	20,522	19,853	600	68	<sup>f</sup> 1,459	7,780
1987	20,303	19,691	<sup>g</sup> -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, 1957–2006 (in millions of dollars)—Continued**

Year	Receipts					Expenditures				Assets	
	Total	Net contributions <sup>a</sup>	Income from taxation of benefits	Net interest <sup>b</sup>	Payments from the general fund of the Treasury <sup>c</sup>	Total	Benefit payments <sup>d</sup>	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	...	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

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 investments. Beginning in 1967, administrative expenses are charged to the trust fund on an estimated basis, with a final adjustment, including interest, made in the following fiscal year. The amounts of these interest adjustments are included in net interest. Beginning in July 1974, the figures shown include relatively small amounts of gifts to the fund. Figures for 1983–1986 reflect payments from a borrowing trust fund to a lending trust fund for interest on amounts owed under the interfund borrowing provisions. During 1983–1990, interest paid from the trust fund to the general fund of the Treasury on advance tax transfers is reflected. The amount shown for 1985 includes an interest adjustment of \$14.8 million on unnegotiated checks issued before April 1985.
- 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.
- Between -\$500,000 and \$500,000.
- Amount equals total receipts less total expenditures, less amounts loaned or plus amounts repaid under interfund borrowing provisions.
- Reflects \$195 million in transfers from the DI trust fund to the general fund of the Treasury to correct estimated amounts transferred for calendar years 1984 and 1985.

CONTACT: Jeff Kunkel (410) 965-3013.



Table 4.A3—Combined OASI and DI, 1957–2006 (in millions of dollars)

Year	Receipts					Expenditures				Assets	
	Total	Net contributions <sup>a</sup>	Income from taxation of benefits	Net interest <sup>b</sup>	Payments from the general fund of the Treasury <sup>c</sup>	Total	Benefit payments <sup>d</sup>	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	<sup>e</sup> 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	<sup>e</sup> 11,088	42,163
1986	216,833	209,140	3,662	3,871	160	201,522	196,667	2,202	2,653	<sup>e</sup> 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, 1957–2006 (in millions of dollars)—Continued**

Year	Receipts					Expenditures				Assets	
	Total	Net contributions <sup>a</sup>	Income from taxation of benefits	Net interest <sup>b</sup>	Payments from the general fund of the Treasury <sup>c</sup>	Total	Benefit payments <sup>d</sup>	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	<sup>f</sup>	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	<sup>f</sup>	555,421	546,238	5,337	3,846	189,452	2,048,112

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 investments. Beginning in 1967, administrative expenses are charged to the trust fund on an estimated basis, with a final adjustment, including interest, made in the following fiscal year. The amounts of these interest adjustments are included in net interest. Beginning in October 1973, the figures shown include relatively small amounts of gifts to the fund. Figures for 1983–1986 reflect payments from a borrowing trust fund to a lending trust fund for interest on amounts owed under the interfund borrowing provisions. During 1983–1990, interest paid from the trust fund to the general fund of the Treasury on advance tax transfers is reflected. The amount shown for 1985 includes an interest adjustment of \$102.8 million on unnegotiated checks issued before April 1985.
- 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: Jeff Kunkel (410) 965-3013.

**Table 4.A4—Total annual benefits paid, by type of benefit and trust fund, and as a percentage of personal income, selected years 1937–2006 (in millions of dollars)**

Year	Total benefits	Cash benefits <sup>a</sup>		Service benefits		Rehabilitation services <sup>b</sup>		Personal income <sup>c</sup>	Total benefits as a percentage of personal income
		Old-Age and Survivors Insurance <sup>d</sup>	Disability Insurance	Hospital Insurance	Supplementary Medical Insurance	Old-Age and Survivors Insurance	Disability Insurance		
1937	1	1	...	...	...	...	...	74,100	<sup>e</sup>
1938	10	10	...	...	...	...	...	68,400	<sup>e</sup>
1939	14	14	...	...	...	...	...	72,900	<sup>e</sup>
1940	35	35	...	...	...	...	...	78,500	<sup>e</sup>
1945	274	274	...	...	...	...	...	171,700	0.2
1950	961	961	...	...	...	...	...	229,000	0.4
1955	4,968	4,968	...	...	...	...	...	316,100	1.6
1960	11,245	10,677	568	...	...	...	...	411,500	2.7
1961	12,749	11,862	887	...	...	...	...	429,000	3.0
1962	14,461	13,356	1,105	...	...	...	...	456,700	3.2
1963	15,427	14,217	1,210	...	...	...	...	479,600	3.2
1964	16,223	14,914	1,309	...	...	...	...	514,600	3.2
1965	18,311	16,737	1,573	...	...	...	...	555,700	3.3
1966	21,070	18,267	1,781	891	128	<sup>f</sup>	3	603,900	3.5
1967	25,967	19,468	1,939	3,353	1,197	<sup>f</sup>	11	648,300	4.0
1968	30,651	22,642	2,294	4,179	1,518	1	16	712,000	4.3
1969	33,371	24,209	2,542	4,739	1,865	1	15	778,500	4.3
1970	38,982	28,796	3,067	5,124	1,975	2	18	838,800	4.6
1971	45,065	33,413	3,758	5,751	2,117	2	24	903,500	5.0
1972	50,269	37,122	4,473	6,318	2,325	2	29	992,700	5.1
1973	61,091	45,741	5,718	7,057	2,526	3	46	1,110,700	5.5
1974	70,996	51,618	6,903	9,099	3,318	5	54	1,222,600	5.8
1975	82,611	58,509	8,414	11,315	4,273	9	91	1,335,000	6.2
1976	94,180	65,699	9,966	13,340	5,080	6	89	1,474,800	6.4
1977	106,443	73,113	11,463	15,737	6,038	8	84	1,633,200	6.5
1978	117,894	80,352	12,513	17,682	7,252	9	86	1,837,700	6.4
1979	133,691	90,556	13,708	20,623	8,708	18	78	2,062,200	6.5
1980	156,298	105,074	15,437	25,064	10,635	8	78	2,307,900	6.8
1981	184,450	123,795	17,199	30,342	13,113	8	-8	2,591,300	7.1
1982	207,268	138,800	17,338	35,631	15,455	6	38	2,775,300	7.5
1983	224,524	149,502	17,530	39,337	18,106	6	42	2,960,700	7.6
1984	238,682	157,862	17,900	43,257	19,661	<sup>f</sup>	1	3,289,500	7.3
1985	256,723	167,360	18,836	47,580	22,947	<sup>f</sup>	<sup>f</sup>	3,526,700	7.3
1986	272,698	176,845	19,847	49,758	26,239	...	9	3,722,400	7.3
1987	284,487	183,644	20,512	49,496	30,820	...	16	3,947,400	7.2
1988	303,717	195,522	21,692	52,517	33,970	...	16	4,253,700	7.1
1989	329,193	207,977	22,873	60,011	38,294	...	38	4,587,800	7.2
1990	356,536	222,993	24,803	66,239	42,468	...	32	4,878,600	7.3
1991	386,912	240,436	27,662	71,549	47,229	...	36	5,051,000	7.7
1992	419,325	254,939	31,091	83,895	49,367	...	33	5,362,000	7.8
1993	449,896	267,804	34,598	93,487	53,979	...	28	5,558,500	8.1
1994	478,775	279,118	37,717	103,282	58,618	...	40	5,842,500	8.2

(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 1937–2006 (in millions of dollars)—Continued**

Year	Total benefits	Cash benefits <sup>a</sup>		Service benefits		Rehabilitation services <sup>b</sup>		Personal income <sup>c</sup>	Total benefits as a percentage of personal income
		Old-Age and Survivors Insurance <sup>d</sup>	Disability Insurance	Hospital Insurance	Supplementary Medical Insurance	Old-Age and Survivors Insurance	Disability Insurance		
1995	513,959	291,682	40,898	116,368	64,972	...	39	6,152,300	8.4
1996	544,350	302,914	44,174	128,632	68,598	...	31	6,520,600	8.3
1997	572,542	316,311	45,659	137,762	72,757	...	53	6,915,100	8.3
1998	585,156	326,817	48,173	133,990	76,125	...	51	7,423,000	7.9
1999	595,326	334,437	51,331	128,766	80,724	...	68	7,802,400	7.6
2000	625,060	352,706	54,938	128,458	88,893	...	63	8,429,700	7.4
2001	672,853	372,370	59,577	141,183	99,663	...	60	8,724,100	7.7
2002	714,804	388,170	65,645	149,944	110,969	...	75	8,881,900	8.0
2003	746,756	399,892	70,906	152,084	123,825	3	47	9,169,100	8.1
2004	795,868	415,082	78,202	167,554	134,978	3	49	9,713,300	8.2
2005	850,058	435,373	85,394	180,013	149,228	58	-9	10,238,200	8.3
2006	907,834	460,457	92,384	188,989	165,939	4	61	10,891,200	8.3

SOURCES: Department of the Treasury and Bureau of Economic Analysis.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

- a. Unnegotiated checks not deducted.
- 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 subject to revision.
- d. For 1937–1939, refunds and lump-sum death payments under the Social Security Act of 1935.
- e. Less than 0.05 percent.
- f. Between -\$500,000 and \$500,000.

CONTACT: Jeff Kunkel (410) 965-3013.

**Table 4.A5—Total annual benefits paid from OASI trust fund, by type of benefit, selected years 1937–2006  
(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 <sup>a</sup>	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 1937–2006 (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 <sup>a</sup>	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	<sup>b</sup>	218
1999	334,437	238,478	18,415	1,992	12,125	1,415	61,769	27	<sup>b</sup>	216
2000	352,706	253,542	18,969	2,133	12,532	1,406	63,884	26	<sup>b</sup>	214
2001	372,370	268,976	19,491	2,332	13,134	1,441	66,758	26	<sup>b</sup>	212
2002	388,170	281,624	19,884	2,475	13,690	1,476	68,782	25	<sup>b</sup>	213
2003	399,892	291,518	19,951	2,583	14,072	1,486	70,052	24	<sup>b</sup>	206
2004	415,082	304,261	20,164	2,714	14,538	1,515	71,660	24	<sup>b</sup>	205
2005	435,373	321,706	20,500	2,888	15,103	1,535	73,411	24	<sup>b</sup>	206
2006	460,457	342,865	21,005	3,082	15,814	1,562	75,900	24	<sup>b</sup>	204

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Amounts by type of benefit are estimated. Unnegotiated checks are not deducted. 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: Jeff Kunkel (410) 965-3013.

**Table 4.A6—Total annual benefits paid from DI trust fund, by type of benefit, 1957–2006 (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

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Amounts by type of benefit are estimated. Unnegotiated checks are not deducted. Totals do not necessarily equal the sum of rounded components.

... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

## 4.B OASDI: Covered Workers

**Table 4.B1—Number of workers with taxable earnings, amount of earnings, and Social Security numbers issued, selected years 1937–2006**

Year	Number <sup>a</sup> (thousands)			Earnings					Social Security numbers issued <sup>b</sup> (thousands)
	Total	With maximum earnings	New entrants into covered employment <sup>c</sup>	Total in covered employment <sup>d</sup> (millions of dollars)	Reported taxable <sup>a</sup>		Average per worker (dollars)		
					Amount (millions of dollars)	Percentage of total	Total earnings <sup>d</sup>	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 1937–2006—Continued**

Year	Number <sup>a</sup> (thousands)			Earnings					Social Security numbers issued <sup>b</sup> (thousands)
	Total	With maximum earnings	New entrants into covered employment <sup>c</sup>	Total in covered employment <sup>d</sup> (millions of dollars)	Reported taxable <sup>a</sup>		Average per worker (dollars)		
					Amount (millions of dollars)	Percentage of total	Total earnings <sup>d</sup>	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 <sup>e</sup>	154,954	8,517	4,195	5,072,430	4,356,500	85.9	32,735	28,115	5,372
2004 <sup>e</sup>	156,900	9,261	4,648	5,382,328	4,563,900	84.8	34,304	29,088	6,065
2005 <sup>f</sup>	159,132	9,679	5,001	5,670,851	4,767,780	84.1	35,636	29,961	5,280
2006 <sup>g</sup>	161,591	--	--	6,034,715	5,046,482	83.6	37,346	31,230	5,662

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. See Table 2.A3 for annual maximum taxable earnings.
- b. Excludes railroad account numbers. Since program began, 436.4 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 2005, 327.6 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, 1951–2006**

Year	Number <sup>a</sup> (thousands)		Wage and salary					Self-employed				
			Total in covered employment <sup>b</sup> (millions of dollars)	Reported taxable		Average per worker (dollars)		Total in covered employment <sup>c</sup> (millions of dollars)	Reported taxable		Average per worker (dollars)	
	Wage and salary	Self-employed		Amount <sup>d</sup> (millions of dollars)	Percentage of total wages	Total wages <sup>b</sup>	Reported taxable <sup>d</sup>		Amount <sup>d</sup> (millions of dollars)	Percentage of total self-employment	Total earnings <sup>c</sup>	Reported taxable <sup>d</sup>
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, 1951–2006—Continued**

Year	Number <sup>a</sup> (thousands)		Wage and salary					Self-employed				
			Total in covered employment <sup>b</sup> (millions of dollars)	Reported taxable		Average per worker (dollars)		Total in covered employment <sup>c</sup> (millions of dollars)	Reported taxable		Average per worker (dollars)	
	Wage and salary	Self-employed		Amount <sup>d</sup> (millions of dollars)	Percentage of total wages	Total wages <sup>b</sup>	Reported taxable <sup>d</sup>		Amount <sup>d</sup> (millions of dollars)	Percentage of total self-employment	Total earnings <sup>c</sup>	Reported taxable <sup>d</sup>
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 <sup>e</sup>	145,563	15,937	4,714,130	4,117,900	87.4	32,385	28,289	358,300	238,600	66.6	22,482	14,971
2004 <sup>e</sup>	147,333	16,480	4,986,428	4,308,300	86.4	33,845	29,242	395,900	255,600	64.6	24,023	15,510
2005 <sup>f</sup>	149,532	16,447	5,249,096	4,498,943	85.7	35,103	30,087	421,755	268,837	63.7	25,643	16,346
2006 <sup>g</sup>	151,881	16,679	5,593,624	4,764,848	85.2	36,829	31,372	441,091	281,634	63.8	26,446	16,886

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. 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 1937–2005**

Year	All workers <sup>a</sup>			Wage and salary			Self-employed <sup>b</sup>		
	Total	Men	Women	Subtotal	Men	Women	Subtotal	Men	Women
<i>Number (thousands)</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 <sup>c</sup>	154,954	81,439	73,515	145,563	75,432	70,131	15,937	9,827	6,110
2004 <sup>c</sup>	156,900	82,295	74,605	147,333	76,245	71,088	16,480	10,026	6,454
2005 <sup>c</sup>	159,132	83,227	75,905	149,532	77,234	72,298	16,447	9,884	6,563

(Continued)

**Table 4.B3—Number of workers and median annual earnings, by type of earnings and sex, selected years 1937–2005—Continued**

Year	All workers <sup>a</sup>			Wage and salary			Self-employed <sup>b</sup>		
	Total	Men	Women	Subtotal	Men	Women	Subtotal	Men	Women
	<i>Median earnings <sup>d</sup> (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 <sup>c</sup>	21,610	26,176	17,848	22,473	27,363	18,499	14,474	17,956	10,670
2004 <sup>c</sup>	22,345	27,080	18,433	23,240	28,302	19,144	14,776	18,294	11,044
2005 <sup>c</sup>	22,933	27,852	18,852	23,819	29,057	19,585	15,026	18,867	11,322

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.
- 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.

CONTACT: Greg Diez (410) 965-0153 or Fred Galeas (410) 965-5507.

## 4.B OASDI: Covered Workers

**Table 4.B4—Percentage of workers with earnings below annual maximum taxable, by sex, selected years 1937–2005**

Year	All workers <sup>a</sup>			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 1937–2005—Continued**

Year	All workers <sup>a</sup>			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 <sup>b</sup>	94.5	91.8	97.5	95.0	93.4	97.6	87,000
2004 <sup>b</sup>	94.1	91.2	97.2	94.9	93.2	97.5	87,900
2005 <sup>b</sup>	93.9	91.0	97.1	94.9	93.2	97.5	90,000

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.

CONTACT: Greg Diez (410) 965-0153 or Fred Galeas (410) 965-5507.

## 4.B OASDI: Covered Workers

**Table 4.B5—Number of workers, by sex and age, selected years 1937–2005 (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	<sup>a</sup> 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 <sup>b</sup>	154,954	10,511	17,066	15,941	16,980	17,568	19,111	17,919	14,869	11,413	3,514	3,567	3,435	827	2,233
2004 <sup>b</sup>	156,900	10,597	17,276	16,277	16,661	17,329	19,026	18,198	15,384	12,019	3,499	3,897	3,595	853	2,289
2005 <sup>b</sup>	159,133	10,929	17,518	16,762	16,232	17,348	18,732	18,461	15,892	12,616	3,418	4,190	3,759	906	2,368
<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	<sup>a</sup> 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	4,729	4,023	3,418	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 <sup>b</sup>	81,440	5,246	8,714	8,281	9,048	9,455	10,077	9,312	7,687	6,002	1,899	1,952	1,944	483	1,339
2004 <sup>b</sup>	82,295	5,253	8,831	8,444	8,850	9,296	10,042	9,453	7,947	6,278	1,885	2,113	2,030	496	1,374
2005 <sup>b</sup>	83,227	5,409	8,921	8,688	8,578	9,272	9,855	9,580	8,217	6,551	1,820	2,268	2,113	531	1,424

(Continued)



Table 4.B5—Number of workers, by sex and age, selected years 1937–2005 (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	<sup>a</sup> 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 <sup>b</sup>	73,515	5,266	8,352	7,660	7,932	8,113	9,034	8,606	7,183	5,410	1,615	1,615	1,491	344	894
2004 <sup>b</sup>	74,605	5,343	8,445	7,833	7,811	8,032	8,983	8,745	7,437	5,741	1,614	1,784	1,565	357	915
2005 <sup>b</sup>	75,906	5,520	8,596	8,074	7,654	8,076	8,877	8,881	7,675	6,066	1,598	1,922	1,647	375	944

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.

CONTACT: Greg Diez (410) 965-0153 or Fred Galeas (410) 965-5507.

## 4.B OASDI: Covered Workers

**Table 4.B6—Median earnings of workers, by sex and age, selected years 1937–2005 (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	<sup>a</sup> 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 <sup>b</sup>	21,610	2,632	10,314	21,043	26,466	28,333	29,495	30,916	31,563	29,150	25,452	19,322	11,863	8,687	5,975
2004 <sup>b</sup>	22,345	2,709	10,665	21,491	27,338	29,546	30,566	31,970	32,776	30,418	26,479	20,753	12,584	9,158	6,296
2005 <sup>b</sup>	22,933	2,742	10,903	21,946	27,900	30,535	31,391	32,678	33,724	31,510	27,790	21,943	13,320	9,550	6,587
<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	<sup>a</sup> 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 <sup>b</sup>	26,176	2,725	11,382	23,356	30,899	34,305	36,568	38,171	38,711	36,412	31,523	23,888	13,392	9,470	6,348
2004 <sup>b</sup>	27,080	2,793	11,836	23,830	32,027	35,798	37,928	39,648	40,206	37,904	32,896	25,960	14,490	9,911	6,636
2005 <sup>b</sup>	27,852	2,816	12,173	24,424	32,628	36,966	39,085	40,612	41,278	39,057	34,626	27,368	15,315	10,414	6,997

(Continued)

**Table 4.B6—Median earnings of workers, by sex and age, selected years 1937–2005 (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	<sup>a</sup> 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 <sup>b</sup>	17,848	2,552	9,365	18,675	21,754	22,321	23,197	24,939	25,813	23,508	20,495	15,540	10,414	7,921	5,476
2004 <sup>b</sup>	18,433	2,632	9,660	19,083	22,389	23,188	24,014	25,704	26,658	24,680	21,465	16,650	10,968	8,205	5,901
2005 <sup>b</sup>	18,852	2,675	9,828	19,426	22,878	23,955	24,586	26,062	27,461	25,633	22,396	17,482	11,506	8,574	6,202

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.

CONTACT: Greg Diez (410) 965-0153 or Fred Galeas (410) 965-5507.

## 4.B OASDI: Covered Workers

**Table 4.B7—Number of wage and salary workers, by sex and amount of taxable earnings, 1992–2005 (in thousands)**

Year	Total	Workers with earnings below the taxable maximum (by dollar amount of earnings)											Workers with maximum earnings
		1–999	1,000–4,999	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	
<i>All wage and salary workers</i>													
1992	126,000	9,357	19,519	17,496	29,812	20,699	12,554	7,084	2,422	...	...	...	7,057
1993	128,100	9,655	19,395	17,521	29,900	21,134	12,786	7,371	3,325	...	...	...	7,013
1994	130,100	9,591	19,403	17,273	29,903	21,482	13,230	7,709	4,310	277	...	...	6,921
1995	132,800	9,213	19,355	17,213	30,142	22,097	13,853	8,171	4,662	498	...	...	7,597
1996	135,100	9,161	19,195	16,977	29,832	22,612	14,435	8,706	5,052	1,053	...	...	8,077
1997	137,765	8,743	18,811	16,853	29,676	23,076	15,243	9,330	5,523	2,106	...	...	8,405
1998	140,386	8,427	18,402	16,431	29,360	23,586	16,095	10,062	6,008	3,268	...	...	8,747
1999	142,703	8,260	18,162	16,261	28,975	23,861	16,763	10,546	6,456	3,974	856	...	8,589
2000	146,097	8,241	17,978	15,995	28,443	24,306	17,384	11,330	7,056	4,439	1,994	...	8,933
2001	146,596	8,137	17,563	15,596	27,746	23,983	17,661	11,776	7,462	4,730	3,151	177	8,614
2002	145,793	8,156	17,331	15,386	26,910	23,495	17,607	11,853	7,662	4,957	3,329	1,266	7,840
2003 <sup>a</sup>	145,563	8,135	16,977	15,209	26,306	23,053	17,593	12,035	7,820	5,191	3,479	1,829	7,937
2004 <sup>a</sup>	147,332	8,015	16,832	14,935	25,965	22,887	17,747	12,425	8,264	5,602	3,786	2,225	8,650
2005 <sup>a</sup>	149,533	8,013	16,870	14,875	25,745	22,906	17,972	12,763	8,604	5,859	3,998	2,892	9,035
<i>Men</i>													
1992	66,543	4,171	8,743	7,726	13,773	11,128	8,069	5,109	1,868	...	...	...	5,955
1993	67,673	4,429	8,665	7,740	13,875	11,270	8,074	5,224	2,527	...	...	...	5,869
1994	68,481	4,350	8,548	7,546	13,836	11,360	8,211	5,372	3,243	222	...	...	5,794
1995	69,901	4,256	8,510	7,457	13,865	11,653	8,448	5,587	3,444	388	...	...	6,292
1996	70,670	4,177	8,333	7,261	13,491	11,791	8,667	5,838	3,672	800	...	...	6,641
1997	71,910	4,040	8,158	7,154	13,199	11,864	8,957	6,162	3,932	1,582	...	...	6,862
1998	73,111	3,900	7,964	6,936	12,868	11,947	9,297	6,520	4,199	2,406	...	...	7,074
1999	74,376	3,848	7,894	6,892	12,595	11,942	9,565	6,711	4,456	2,895	642	...	6,936
2000	76,033	3,858	7,822	6,788	12,241	11,958	9,755	7,070	4,734	3,170	1,474	...	7,163
2001	76,303	3,851	7,754	6,693	11,985	11,629	9,763	7,170	4,907	3,268	2,284	136	6,862
2002	75,711	3,932	7,695	6,664	11,693	11,258	9,612	7,065	4,925	3,341	2,372	937	6,217
2003 <sup>a</sup>	75,432	3,914	7,579	6,554	11,419	11,019	9,499	7,093	4,936	3,438	2,437	1,313	6,232
2004 <sup>a</sup>	76,244	3,833	7,457	6,480	11,250	10,831	9,455	7,242	5,137	3,679	2,600	1,570	6,709
2005 <sup>a</sup>	77,234	3,830	7,461	6,424	11,059	10,809	9,481	7,390	5,296	3,800	2,693	2,035	6,958
<i>Women</i>													
1992	59,457	5,186	10,776	9,770	16,039	9,571	4,485	1,975	...	...	...	...	1,103
1993	60,427	5,226	10,730	9,781	16,026	9,864	4,712	2,147	...	...	...	...	1,144
1994	61,619	5,241	10,856	9,726	16,068	10,122	5,020	2,337	1,067	55	...	...	1,127
1995	62,900	4,957	10,845	9,756	16,277	10,444	5,405	2,584	1,217	110	...	...	1,305
1996	64,429	4,985	10,862	9,716	16,341	10,819	5,768	2,868	1,380	253	...	...	1,437
1997	65,855	4,703	10,653	9,698	16,477	11,212	6,285	3,169	1,591	524	...	...	1,543
1998	67,275	4,527	10,438	9,495	16,492	11,640	6,798	3,541	1,808	862	...	...	1,673
1999	68,327	4,411	10,267	9,369	16,380	11,919	7,199	3,835	2,000	1,079	214	...	1,652
2000	70,064	4,383	10,156	9,206	16,203	12,348	7,630	4,260	2,321	1,268	519	...	1,770
2001	70,293	4,286	9,809	8,903	15,761	12,354	7,898	4,606	2,555	1,462	867	41	1,752
2002	70,082	4,225	9,635	8,721	15,218	12,237	7,995	4,788	2,737	1,617	958	329	1,624
2003 <sup>a</sup>	70,131	4,221	9,398	8,655	14,887	12,034	8,093	4,943	2,884	1,753	1,042	516	1,705
2004 <sup>a</sup>	71,088	4,182	9,376	8,454	14,715	12,056	8,292	5,182	3,127	1,923	1,186	655	1,941
2005 <sup>a</sup>	72,299	4,183	9,409	8,451	14,686	12,098	8,491	5,373	3,308	2,059	1,305	858	2,077

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTE: ... = not applicable.

a. Preliminary data.

CONTACT: Greg Diez (410) 965-0153 or Fred Galeas (410) 965-5507.

**Table 4.B8—Number of self-employed workers, by sex and age, selected years 1951–2005  
(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 <sup>a</sup>	15,938	177	703	1,117	1,634	1,908	2,202	2,169	1,920	1,586	540	588	654	173	566
2004 <sup>a</sup>	16,479	190	745	1,186	1,632	1,933	2,220	2,219	1,993	1,693	537	655	700	185	591
2005 <sup>a</sup>	16,445	207	781	1,208	1,570	1,897	2,135	2,186	2,002	1,722	518	685	736	196	602
<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 <sup>a</sup>	9,828	110	397	640	959	1,153	1,339	1,338	1,192	988	340	382	447	125	417
2004 <sup>a</sup>	10,026	112	406	672	935	1,147	1,321	1,360	1,228	1,048	340	420	477	129	431
2005 <sup>a</sup>	9,882	124	420	665	885	1,094	1,257	1,323	1,221	1,061	319	438	498	141	437

(Continued)

## 4.B OASDI: Covered Workers

**Table 4.B8—Number of self-employed workers, by sex and age, selected years 1951–2005  
(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 <sup>a</sup>	6,110	67	307	478	675	755	863	831	728	598	200	206	207	49	149
2004 <sup>a</sup>	6,453	78	340	514	697	786	899	859	765	645	197	234	223	56	160
2005 <sup>a</sup>	6,563	83	360	544	684	804	878	863	781	662	199	247	238	55	165

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTE: Age refers to age attained during year.

a. Preliminary data.

CONTACT: Greg Diez (410) 965-0153 or Fred Galeas (410) 965-5507.

**Table 4.B9—Number of self-employed workers, by sex and amount of taxable earnings, 1992–2005  
(in thousands)**

Year	Total	Workers with earnings below taxable maximum (by dollar amount of earnings)											Workers with maximum earnings
		1–999	1,000–4,999	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	
<b>All self-employed workers</b>													
1992	13,100	593	2,927	2,519	2,755	1,576	971	612	308	...	...	...	839
1993	13,200	587	2,866	2,562	2,776	1,570	990	633	388	...	...	...	828
1994	13,300	551	2,825	2,510	2,832	1,586	1,019	645	426	92	...	...	814
1995	13,500	535	2,781	2,593	2,882	1,604	1,044	678	444	116	...	...	822
1996	13,900	521	2,791	2,667	2,964	1,650	1,092	713	471	176	...	...	853
1997	14,020	522	2,716	2,674	2,966	1,669	1,100	737	489	278	...	...	869
1998	14,230	510	2,643	2,675	3,011	1,717	1,157	777	505	387	...	...	848
1999	14,500	485	2,573	2,688	3,075	1,756	1,191	804	535	384	162	...	848
2000	14,675	502	2,474	2,618	3,019	1,730	1,189	811	560	399	269	...	1,104
2001	14,930	497	2,501	2,627	3,123	1,741	1,186	834	584	400	314	82	1,042
2002	15,249	509	2,591	2,710	3,305	1,777	1,202	850	601	426	305	197	776
2003 <sup>a</sup>	15,937	521	2,662	2,836	3,476	1,843	1,249	897	639	440	327	249	796
2004 <sup>a</sup>	16,479	535	2,700	2,877	3,619	1,899	1,272	945	670	472	349	301	839
2005 <sup>a</sup>	16,446	527	2,622	2,866	3,574	1,865	1,284	944	696	488	362	376	842
<b>Men</b>													
1992	8,798	288	1,603	1,606	1,936	1,145	746	485	253	...	...	...	734
1993	8,840	291	1,559	1,632	1,927	1,141	760	500	316	...	...	...	715
1994	8,839	268	1,511	1,552	1,958	1,153	772	503	340	77	...	...	705
1995	8,908	256	1,492	1,581	1,964	1,152	782	521	356	96	...	...	708
1996	9,074	247	1,468	1,598	1,997	1,176	807	545	367	141	...	...	729
1997	9,078	255	1,429	1,550	1,980	1,171	796	559	381	223	...	...	735
1998	9,109	247	1,378	1,518	1,955	1,189	831	584	389	309	...	...	710
1999	9,225	233	1,336	1,497	1,972	1,202	848	591	409	299	129	...	709
2000	9,280	238	1,285	1,425	1,908	1,159	830	585	415	304	211	...	920
2001	9,354	236	1,283	1,428	1,934	1,159	812	596	423	305	247	66	865
2002	9,442	245	1,345	1,458	2,024	1,175	823	594	439	310	231	155	643
2003 <sup>a</sup>	9,827	252	1,386	1,517	2,092	1,220	848	635	460	324	248	194	651
2004 <sup>a</sup>	10,026	257	1,388	1,518	2,120	1,230	863	657	479	345	258	231	680
2005 <sup>a</sup>	9,883	255	1,338	1,486	2,035	1,188	857	653	490	352	267	287	676
<b>Women</b>													
1992	4,302	305	1,323	913	819	431	225	127	55	...	...	...	105
1993	4,360	296	1,308	930	849	429	230	133	73	...	...	...	113
1994	4,460	282	1,314	957	873	435	246	142	85	15	...	...	109
1995	4,592	280	1,289	1,012	918	452	261	157	88	20	...	...	114
1996	4,826	274	1,323	1,069	967	475	285	168	104	35	...	...	125
1997	4,942	267	1,287	1,125	985	499	303	178	108	55	...	...	134
1998	5,121	264	1,265	1,157	1,056	528	327	193	116	78	...	...	138
1999	5,276	251	1,237	1,191	1,103	554	343	212	126	85	33	...	139
2000	5,395	265	1,189	1,192	1,111	570	359	226	145	95	58	...	184
2001	5,576	261	1,218	1,198	1,189	581	374	238	161	95	67	17	177
2002	5,807	264	1,246	1,252	1,281	602	379	256	162	116	74	42	133
2003 <sup>a</sup>	6,110	269	1,276	1,319	1,385	623	401	262	179	116	79	55	145
2004 <sup>a</sup>	6,453	278	1,312	1,359	1,499	669	409	288	191	126	91	70	159
2005 <sup>a</sup>	6,563	273	1,284	1,381	1,539	677	426	291	206	136	95	90	166

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

NOTES: Taxable earnings consist of self-employment income and taxable wages. See Table 2.A3.

... = not applicable.

a. Preliminary data.

CONTACT: Greg Diez (410) 965-0153 or Fred Galeas (410) 965-5507.

## 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, 2005**

State or area <sup>a</sup>	Number <sup>b</sup> (thousands)			Taxable earnings <sup>c</sup> (millions of dollars)			OASDI contributions <sup>d</sup> (millions of dollars)		
	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed
All areas	159,132	149,532	16,447	4,767,780	4,498,943	268,837	591,205	557,869	33,336
Alabama	2,359	2,230	230	62,145	58,969	3,176	7,706	7,312	394
Alaska	385	363	41	11,450	10,752	699	1,420	1,333	87
Arizona	2,943	2,792	272	87,752	83,145	4,607	10,881	10,310	571
Arkansas	1,482	1,391	158	35,651	33,594	2,056	4,421	4,166	255
California	17,053	15,605	2,224	557,295	513,491	43,804	69,105	63,673	5,432
Colorado	2,440	2,263	302	74,631	69,745	4,886	9,254	8,648	606
Connecticut	1,984	1,853	215	71,048	66,020	5,028	8,810	8,186	623
Delaware	515	493	38	16,233	15,659	574	2,013	1,942	71
District of Columbia	363	348	30	13,133	12,385	748	1,628	1,536	93
Florida	9,383	8,798	1,028	260,861	246,713	14,149	32,347	30,592	1,754
Georgia	4,669	4,399	473	137,049	130,198	6,851	16,994	16,145	850
Hawaii	727	685	70	22,264	21,095	1,169	2,761	2,616	145
Idaho	780	737	83	20,093	18,918	1,175	2,492	2,346	146
Illinois	6,625	6,237	681	206,964	196,305	10,658	25,664	24,342	1,322
Indiana	3,656	3,501	304	103,062	98,527	4,536	12,780	12,217	562
Iowa	1,751	1,642	196	47,212	44,335	2,876	5,854	5,498	357
Kansas	1,570	1,481	167	44,294	41,796	2,498	5,492	5,183	310
Kentucky	2,176	2,053	222	56,766	53,997	2,769	7,039	6,696	343
Louisiana	2,127	2,001	218	53,312	50,282	3,031	6,611	6,235	376
Maine	785	725	100	20,152	18,684	1,468	2,499	2,317	182
Maryland	3,209	3,049	299	114,479	109,414	5,066	14,195	13,567	628
Massachusetts	3,481	3,239	391	119,501	111,656	7,845	14,818	13,845	973
Michigan	5,462	5,207	481	165,852	159,088	6,764	20,566	19,727	839
Minnesota	3,136	2,968	314	99,223	94,296	4,928	12,304	11,693	611
Mississippi	1,410	1,331	137	34,304	32,424	1,880	4,254	4,021	233
Missouri	3,173	2,993	318	85,470	81,012	4,459	10,598	10,045	553
Montana	553	510	75	12,952	11,826	1,126	1,606	1,466	140
Nebraska	1,061	1,003	109	28,617	27,103	1,515	3,549	3,361	188
Nevada	1,223	1,169	99	34,942	33,140	1,802	4,333	4,109	223
New Hampshire	821	767	87	26,510	24,786	1,724	3,287	3,073	214
New Jersey	4,840	4,581	451	180,474	171,223	9,251	22,379	21,232	1,147
New Mexico	938	885	93	24,525	23,211	1,315	3,041	2,878	163
New York	10,170	9,503	1,108	338,391	320,092	18,298	41,960	39,691	2,269
North Carolina	4,688	4,419	464	132,887	125,696	7,190	16,478	15,586	892
North Dakota	397	373	46	10,191	9,494	697	1,264	1,177	86
Ohio	5,982	5,639	573	166,325	158,085	8,239	20,624	19,603	1,022
Oklahoma	1,870	1,752	203	47,470	44,836	2,634	5,886	5,560	327
Oregon	1,952	1,827	203	56,507	52,990	3,517	7,007	6,571	436
Pennsylvania	6,848	6,507	589	209,531	199,232	10,299	25,982	24,705	1,277
Rhode Island	629	597	60	19,771	18,801	971	2,452	2,331	120
South Carolina	2,254	2,142	199	60,217	57,410	2,806	7,467	7,119	348
South Dakota	490	458	61	11,685	10,811	875	1,449	1,341	108
Tennessee	3,237	3,020	370	88,522	82,079	6,443	10,977	10,178	799
Texas	10,971	10,201	1,319	316,792	296,582	20,210	39,282	36,776	2,506
Utah	1,287	1,234	111	34,540	33,111	1,429	4,283	4,106	177

(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, 2005—Continued**

State or area <sup>a</sup>	Number <sup>b</sup> (thousands)			Taxable earnings <sup>c</sup> (millions of dollars)			OASDI contributions <sup>d</sup> (millions of dollars)		
	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed
Vermont	428	401	48	11,411	10,646	765	1,415	1,320	95
Virginia	4,317	4,106	387	142,997	136,147	6,850	17,732	16,882	849
Washington	3,414	3,231	316	112,064	106,309	5,755	13,896	13,182	714
West Virginia	901	855	80	23,232	22,087	1,145	2,881	2,739	142
Wisconsin	3,242	3,096	272	96,554	92,491	4,063	11,973	11,469	504
Wyoming	325	308	36	8,707	8,196	511	1,080	1,016	63
Outlying area									
Puerto Rico	1,261	1,185	87	23,488	21,902	1,586	2,913	2,716	197
Other and unknown <sup>e</sup>	1,386	1,379	9	28,282	28,159	123	3,507	3,492	15

SOURCE: Social Security Administration, Continuous Work History Sample, 1 percent sample.

NOTE: Data are based on preliminary estimates.

- State designation based primarily on employee end-of-year residence, obtained from employer wage reports filed via magnetic media. State designation based on location of employer for reports filed via 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.
- Annual maximum taxable earnings for Social Security (OASDI) from a single employer or from self-employment were \$90,000 in 2005.
- For 2005 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.
- Persons employed in American Samoa, Guam, Northern Mariana Islands, and Virgin Islands; U.S. citizens employed abroad by U.S. employers; persons employed on U.S. oceanborne vessels; and workers with unknown residence.

CONTACT: Greg Diez (410) 965-0153 or Fred Galeas (410) 965-5507.

#### 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 1937–2006**

Year	Number <sup>a</sup> (thousands)			Taxable earnings <sup>b</sup> (millions of dollars)			OASDI contributions <sup>c,d</sup> (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 1937–2006—Continued**

Year	Number <sup>a</sup> (thousands)			Taxable earnings <sup>b</sup> (millions of dollars)			OASDI contributions <sup>c,d</sup> (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 <sup>e</sup>	154,954	145,563	15,937	4,356,500	4,117,900	238,600	540,206	510,620	29,586
2004 <sup>e</sup>	156,900	147,333	16,480	4,563,900	4,308,300	255,600	565,924	534,229	31,694
2005 <sup>f</sup>	159,132	149,532	16,447	4,767,780	4,498,943	268,837	591,205	557,869	33,336
2006 <sup>g</sup>	161,591	151,881	16,679	5,046,482	4,764,848	281,634	625,764	590,841	34,923

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. See Table 2.A3 for annual maximum taxable earnings.
- c. See Table 2.A3 for contribution rates.
- d. 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.

CONTACT: Greg Diez (410) 965-0153 or Fred Galeas (410) 965-5507.

#### 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, 2005**

State or area <sup>a</sup>	Number <sup>b</sup> (thousands)			Taxable earnings <sup>c</sup> (millions of dollars)			HI contributions <sup>d</sup> (millions of dollars)		
	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed
All areas	162,893	153,440	17,247	5,885,801	5,464,046	421,755	170,688	158,457	12,231
Alabama	2,371	2,242	239	70,161	65,275	4,886	2,035	1,893	142
Alaska	412	391	42	14,166	13,278	888	411	385	26
Arizona	2,953	2,802	287	101,580	94,369	7,211	2,946	2,737	209
Arkansas	1,488	1,396	163	38,770	36,206	2,564	1,124	1,050	74
California	17,942	16,529	2,334	764,636	695,561	69,075	22,174	20,171	2,003
Colorado	2,611	2,446	316	95,387	87,817	7,571	2,766	2,547	220
Connecticut	2,027	1,897	233	105,797	95,628	10,169	3,068	2,773	295
Delaware	517	495	40	18,388	17,471	918	533	507	27
District of Columbia	374	359	33	18,055	16,174	1,880	524	469	55
Florida	9,442	8,857	1,074	315,011	294,793	20,217	9,135	8,549	586
Georgia	4,776	4,509	496	167,716	157,612	10,104	4,864	4,571	293
Hawaii	746	706	73	25,563	23,997	1,566	741	696	45
Idaho	783	739	84	21,901	20,472	1,430	635	594	41
Illinois	6,880	6,504	721	268,329	250,492	17,837	7,782	7,264	517
Indiana	3,670	3,515	318	113,910	107,792	6,118	3,303	3,126	177
Iowa	1,756	1,646	202	51,131	47,763	3,369	1,483	1,385	98
Kansas	1,576	1,488	174	50,378	47,082	3,296	1,461	1,365	96
Kentucky	2,230	2,109	230	65,852	61,187	4,665	1,910	1,774	135
Louisiana	2,300	2,181	225	66,806	62,766	4,040	1,937	1,820	117
Maine	816	758	102	23,521	21,834	1,687	682	633	49
Maryland	3,281	3,122	321	141,268	132,593	8,675	4,097	3,845	252
Massachusetts	3,712	3,487	417	161,308	148,924	12,384	4,678	4,319	359
Michigan	5,482	5,227	506	188,184	178,621	9,562	5,457	5,180	277
Minnesota	3,147	2,979	331	113,193	107,033	6,160	3,283	3,104	179
Mississippi	1,416	1,337	141	37,070	34,670	2,400	1,075	1,005	70
Missouri	3,239	3,062	330	101,434	94,744	6,691	2,942	2,748	194
Montana	556	513	77	14,854	13,300	1,553	431	386	45
Nebraska	1,065	1,006	114	31,773	29,628	2,145	921	859	62
Nevada	1,296	1,245	104	44,107	41,342	2,764	1,279	1,199	80
New Hampshire	833	778	92	31,485	29,362	2,123	913	851	62
New Jersey	4,865	4,604	489	238,445	220,511	17,934	6,915	6,395	520
New Mexico	947	894	96	26,742	25,058	1,684	776	727	49
New York	10,191	9,521	1,173	456,632	412,623	44,009	13,242	11,966	1,276
North Carolina	4,699	4,429	484	150,719	140,661	10,058	4,371	4,079	292
North Dakota	399	375	47	11,047	10,192	855	320	296	25
Ohio	6,464	6,151	599	212,124	200,786	11,338	6,152	5,823	329
Oklahoma	1,886	1,768	210	52,210	49,082	3,128	1,514	1,423	91
Oregon	1,960	1,835	209	63,051	58,492	4,559	1,828	1,696	132
Pennsylvania	6,883	6,541	624	250,929	235,638	15,291	7,277	6,834	443
Rhode Island	638	606	65	23,127	21,746	1,381	671	631	40
South Carolina	2,258	2,146	207	66,646	62,677	3,970	1,933	1,818	115
South Dakota	493	460	62	12,809	11,730	1,079	371	340	31
Tennessee	3,253	3,035	384	105,289	94,496	10,793	3,053	2,740	313
Texas	11,545	10,797	1,371	402,278	372,975	29,303	11,666	10,816	850
Utah	1,296	1,243	117	39,946	37,499	2,447	1,158	1,087	71

(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, 2005**

State or area <sup>a</sup>	Number <sup>b</sup> (thousands)			Taxable earnings <sup>c</sup> (millions of dollars)			HI contributions <sup>d</sup> (millions of dollars)		
	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed	Total	Wage and salary	Self-employed
Vermont	429	402	49	12,595	11,641	954	365	338	28
Virginia	4,366	4,155	410	170,795	159,670	11,124	4,953	4,630	323
Washington	3,439	3,256	333	128,404	120,058	8,346	3,724	3,482	242
West Virginia	906	861	82	25,352	23,717	1,635	735	688	47
Wisconsin	3,250	3,103	285	107,199	102,134	5,065	3,109	2,962	147
Wyoming	327	309	38	9,739	8,979	760	282	260	22
Outlying area									
Puerto Rico	1,299	1,223	88	25,950	24,027	1,922	753	697	56
Other and unknown <sup>e</sup>	1,406	1,399	9	32,042	31,870	172	929	924	5

SOURCE: Social Security Administration, Continuous Work History Sample, 1 percent sample.

NOTE: Data are based on preliminary estimates.

- State designation based primarily on employee end-of-year residence, obtained from employer wage reports filed via magnetic media. State designation based on location of employer for reports filed via 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.
- For 2005 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.
- Persons employed in American Samoa, Guam, Northern Mariana Islands, and Virgin Islands; U.S. citizens employed abroad by U.S. employers; persons employed on U.S. oceanborne vessels; and workers with unknown residence.

CONTACT: Greg Diez (410) 965-0153 or Fred Galeas (410) 965-5507.

## 4.B OASDI: Covered Workers

**Table 4.B13—Social Security (OASDI) taxable earnings, by sex and age, 2005**

Sex	Total, all ages	Under 20	20–29	30–39	40–49	50–59	60–61	62–64	65–69	70 or older
<i>Social Security (OASDI) taxable earnings (in millions of dollars)</i>										
All workers	4,767,780	46,768	664,364	1,155,399	1,413,220	1,105,415	118,807	127,720	86,540	49,501
Men	2,879,876	24,756	374,806	706,420	862,469	665,240	74,234	81,378	56,879	33,667
Women	1,887,904	22,012	289,557	448,979	550,751	440,175	44,573	46,342	29,661	15,834
<i>Percentage distribution, by age</i>										
All workers	100	1	14	24	30	23	2	3	2	1
Men	100	1	13	25	30	23	3	3	2	1
Women	100	1	15	24	29	23	2	2	2	1
<i>Percentage distribution, by sex</i>										
All workers	100	100	100	100	100	100	100	100	100	100
Men	60	53	56	61	61	60	62	64	66	68
Women	40	47	44	39	39	40	38	36	34	32

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

CONTACT: Greg Diez (410) 965-0153 or Fred Galeas (410) 965-5507.

Table 4.B14—Medicare Part A (HI) taxable earnings, by sex and age, 2005

Sex	Total, all ages	Under 20	20–29	30–39	40–49	50–59	60–61	62–64	65–69	70 or older
<b>Medicare Part A (HI) taxable earnings (in millions of dollars)</b>										
All workers	5,885,801	46,548	689,170	1,337,261	1,791,936	1,494,130	163,982	175,462	117,180	70,053
Men	3,777,290	24,613	390,196	843,660	1,159,865	984,121	114,211	123,919	84,383	52,284
Women	2,108,511	21,935	298,974	493,601	632,071	510,009	49,771	51,543	32,797	17,769
<b>Percentage distribution, by age</b>										
All workers	100	1	12	23	30	25	3	3	2	1
Men	100	1	10	22	31	26	3	3	2	1
Women	100	1	14	23	30	24	2	2	2	1
<b>Percentage distribution, by sex</b>										
All workers	100	100	100	100	100	100	100	100	100	100
Men	64	53	57	63	65	66	70	71	72	75
Women	36	47	43	37	35	34	30	29	28	25

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample.

CONTACT: Greg Diez (410) 965-0153 or Fred Galeas (410) 965-5507.

#### 4.C OASDI: Insured Workers

**Table 4.C1—Estimated number, by insured status, December 31, 1940–2007 (in millions)**

Year	Workers fully insured for retirement benefits, survivor benefits, or both			Workers insured for disability benefits
	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	70.1
1969	106.4	66.7	39.7	72.4
1970	109.1	67.9	41.2	74.5
1971	111.6	69.1	42.5	76.1
1972	114.2	70.4	43.8	77.8
1973	117.5	71.8	45.7	80.4
1974	120.8	73.2	47.6	83.3
1975	124.5	75.6	48.9	85.3
1976	127.3	77.3	50.0	87.0
1977	130.3	79.3	51.0	89.3
1978	134.6	81.5	53.1	93.7
1979	138.6	84.2	54.4	98.0
1980	141.6	86.5	55.1	100.3
1981	144.0	89.1	55.0	102.6
1982	145.8	91.7	54.1	104.5
1983	147.5	95.0	52.6	105.4
1984	149.2	97.7	51.5	107.1
1985	151.8	100.9	50.9	109.6
1986	154.2	104.2	50.0	111.6
1987	156.6	108.2	48.4	113.5
1988	159.1	111.4	47.7	115.7
1989	162.3	114.5	47.8	118.1
1990	164.7	117.0	47.6	120.1
1991	166.6	119.3	47.2	121.5
1992	168.1	121.7	46.4	122.9
1993	169.8	124.2	45.6	124.4
1994	171.4	126.4	44.9	126.2

(Continued)



Table 4.C1—Estimated number, by insured status, December 31, 1940–2007 (in millions)—*Continued*

Year	Workers fully insured for retirement benefits, survivor benefits, or both			Workers insured for disability benefits
	Total	Permanently insured	Not permanently insured	
1995	173.6	128.8	44.8	128.2
1996	175.9	131.4	44.4	130.3
1997	178.2	134.2	44.0	132.4
1998	180.7	136.8	43.9	134.6
1999	183.3	139.1	44.2	137.1
2000	185.8	141.1	44.7	139.5
2001	188.2	143.1	45.1	141.7
2002	190.3	145.1	45.2	143.5
2003	192.0	147.1	44.8	144.6
2004	193.7	149.1	44.6	145.9
2005	196.2	151.3	44.9	148.1
2006	198.5	153.3	45.2	150.2
2007	200.8	155.3	45.5	152.3

SOURCE: Social Security Administration, Continuous Work History Sample, 1 percent sample.

NOTES: Figures are subject to revision.

Totals do not necessarily equal the sum of rounded components.

. . . = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

#### 4.C OASDI: Insured Workers

**Table 4.C2—Estimated number, insured status, sex, and age, December 31, 1970–2007, 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	109,103	4,097	14,984	12,725	10,180	9,253	9,739	10,116	9,303	8,111	6,802	5,292	3,798	4,703
1975	124,513	5,286	16,952	17,062	12,743	10,187	9,289	9,689	9,853	8,825	7,698	6,310	4,577	6,042
1980	141,600	6,506	19,170	19,302	17,229	12,828	10,294	9,284	9,527	9,463	8,380	7,033	5,341	7,244
1985	151,775	4,245	17,739	20,806	19,326	17,151	12,837	10,288	9,153	9,194	8,908	7,489	6,005	8,635
1990	164,695	4,762	16,459	20,486	21,151	19,341	17,193	12,799	10,164	8,911	8,812	8,099	6,452	10,067
1991	166,559	4,288	16,447	19,981	21,372	19,827	17,484	13,833	10,594	8,970	8,702	8,063	6,645	10,354
1992	168,108	3,929	16,153	19,406	21,393	20,338	17,812	14,580	11,232	9,160	8,599	8,090	6,776	10,641
1993	169,797	3,715	15,780	18,901	21,436	20,693	18,313	15,308	11,779	9,425	8,581	8,080	6,869	10,918
1994	171,385	3,728	15,251	18,575	21,271	21,038	18,826	16,160	12,277	9,637	8,463	7,994	7,024	11,141
1995	173,649	3,960	14,820	18,626	20,869	21,319	19,372	17,114	12,629	9,900	8,555	7,977	7,057	11,449
1996	175,859	4,205	14,595	18,580	20,385	21,503	19,845	17,401	13,656	10,327	8,611	7,940	7,032	11,780
1997	178,199	4,356	14,733	18,457	19,860	21,546	20,357	17,727	14,396	10,951	8,858	7,856	7,059	12,044
1998	180,699	4,618	15,027	18,192	19,410	21,631	20,713	18,216	15,112	11,490	9,120	7,793	7,064	12,313
1999	183,257	4,835	15,408	17,866	19,162	21,512	21,077	18,742	15,944	11,977	9,302	7,856	7,004	12,575
2000	185,835	4,902	15,919	17,390	19,253	21,186	21,388	19,285	16,846	12,325	9,616	7,910	7,014	12,802
2001	188,205	4,810	16,353	17,168	19,259	20,758	21,620	19,781	17,203	13,213	10,015	8,016	6,996	13,015
2002	190,285	4,423	16,634	17,289	19,218	20,331	21,770	20,311	17,474	13,979	10,486	8,167	6,970	13,232
2003	191,974	3,969	16,630	17,506	18,935	19,882	21,851	20,706	17,936	14,657	11,060	8,462	6,929	13,452
2004	193,672	3,663	16,536	17,842	18,555	19,608	21,773	21,067	18,461	15,421	11,442	8,680	6,990	13,634
2005	196,175	3,773	16,426	18,311	18,162	19,617	21,467	21,424	19,023	16,281	11,881	8,934	7,049	13,829
2006	198,468	3,897	16,258	18,763	17,872	19,680	21,003	21,667	19,576	16,814	12,542	9,234	7,135	14,027
2007	200,811	4,120	16,081	19,113	17,884	19,590	20,508	21,794	20,106	17,094	13,407	9,739	7,274	14,101
<i>Male</i>														
1970	63,447	2,698	8,573	7,124	5,880	5,456	5,721	5,831	5,395	4,836	3,990	3,030	2,172	2,742
1975	69,800	3,199	9,388	9,229	7,174	5,876	5,406	5,605	5,627	5,064	4,379	3,418	2,414	3,024
1980	77,121	3,668	10,236	10,224	9,331	7,152	5,829	5,303	5,431	5,357	4,662	3,756	2,752	3,420
1985	81,106	2,291	9,412	10,898	10,252	9,256	7,073	5,738	5,155	5,182	4,902	3,963	3,066	3,919
1990	86,828	2,542	8,661	10,743	11,091	10,191	9,156	6,950	5,600	4,967	4,853	4,291	3,296	4,486
1991	87,595	2,280	8,622	10,478	11,209	10,425	9,251	7,476	5,801	4,990	4,782	4,271	3,407	4,603
1992	88,238	2,059	8,476	10,172	11,216	10,686	9,378	7,829	6,124	5,080	4,723	4,289	3,482	4,726
1993	88,932	1,941	8,254	9,892	11,243	10,860	9,605	8,168	6,387	5,205	4,707	4,285	3,538	4,846
1994	89,597	1,948	7,965	9,708	11,148	11,029	9,858	8,573	6,625	5,290	4,643	4,247	3,617	4,947
1995	90,561	2,064	7,688	9,705	10,939	11,164	10,133	9,025	6,784	5,402	4,685	4,247	3,633	5,095
1996	91,515	2,164	7,551	9,654	10,680	11,248	10,373	9,126	7,305	5,604	4,699	4,231	3,623	5,258
1997	92,558	2,242	7,595	9,553	10,389	11,252	10,628	9,258	7,663	5,917	4,819	4,205	3,646	5,391
1998	93,618	2,374	7,714	9,392	10,128	11,281	10,800	9,481	7,996	6,176	4,944	4,165	3,650	5,518
1999	94,694	2,490	7,867	9,193	9,974	11,201	10,971	9,737	8,388	6,411	5,004	4,186	3,629	5,644
2000	95,966	2,520	8,154	8,942	10,058	11,046	11,121	10,007	8,811	6,564	5,143	4,196	3,646	5,760
2001	96,989	2,464	8,376	8,798	10,029	10,836	11,227	10,251	8,947	6,999	5,321	4,233	3,638	5,871
2002	97,875	2,252	8,519	8,853	9,971	10,611	11,268	10,503	9,063	7,366	5,554	4,305	3,622	5,990
2003	98,544	2,013	8,490	8,946	9,801	10,376	11,312	10,695	9,269	7,671	5,828	4,439	3,596	6,109
2004	99,265	1,836	8,453	9,106	9,580	10,229	11,282	10,872	9,521	8,024	5,995	4,534	3,621	6,213
2005	100,439	1,891	8,387	9,341	9,365	10,223	11,137	11,046	9,790	8,440	6,198	4,653	3,641	6,327
2006	101,523	1,951	8,284	9,579	9,196	10,225	10,905	11,156	10,054	8,678	6,554	4,821	3,689	6,431
2007	102,593	2,066	8,178	9,761	9,191	10,152	10,649	11,210	10,311	8,784	6,972	5,079	3,755	6,486
<i>Female</i>														
1970	45,656	1,399	6,411	5,601	4,300	3,798	4,019	4,285	3,908	3,274	2,812	2,262	1,626	1,961
1975	54,712	2,087	7,564	7,833	5,569	4,311	3,883	4,084	4,226	3,762	3,319	2,893	2,163	3,018
1980	64,478	2,838	8,934	9,078	7,898	5,675	4,465	3,981	4,096	4,106	3,719	3,277	2,589	3,825
1985	70,669	1,954	8,327	9,908	9,075	7,896	5,764	4,551	3,998	4,012	4,005	3,527	2,939	4,717
1990	77,867	2,219	7,798	9,743	10,060	9,150	8,037	5,849	4,564	3,944	3,959	3,808	3,156	5,581
1991	78,964	2,008	7,825	9,503	10,164	9,401	8,234	6,358	4,793	3,979	3,920	3,792	3,238	5,751
1992	79,869	1,870	7,677	9,234	10,177	9,652	8,433	6,751	5,108	4,081	3,876	3,802	3,294	5,915
1993	80,865	1,774	7,526	9,008	10,193	9,833	8,708	7,140	5,391	4,220	3,874	3,795	3,332	6,071
1994	81,788	1,781	7,286	8,867	10,123	10,009	8,968	7,587	5,652	4,348	3,820	3,747	3,407	6,195

(Continued)

**Table 4.C2—Estimated number, insured status, sex, and age, December 31, 1970–2007, 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>														
1995	83,088	1,896	7,133	8,921	9,930	10,156	9,239	8,089	5,846	4,498	3,871	3,730	3,425	6,354
1996	84,344	2,041	7,044	8,926	9,706	10,256	9,472	8,275	6,351	4,723	3,912	3,709	3,409	6,522
1997	85,642	2,114	7,138	8,904	9,472	10,293	9,729	8,469	6,733	5,034	4,039	3,650	3,413	6,653
1998	87,081	2,244	7,314	8,800	9,282	10,350	9,913	8,735	7,116	5,314	4,175	3,629	3,413	6,795
1999	88,563	2,345	7,541	8,673	9,187	10,310	10,106	9,004	7,556	5,566	4,298	3,670	3,375	6,930
2000	89,869	2,382	7,765	8,448	9,195	10,140	10,267	9,279	8,035	5,761	4,472	3,714	3,368	7,042
2001	91,216	2,346	7,977	8,370	9,230	9,922	10,393	9,530	8,256	6,214	4,694	3,783	3,358	7,144
2002	92,410	2,171	8,116	8,437	9,248	9,720	10,502	9,809	8,411	6,613	4,932	3,862	3,348	7,242
2003	93,430	1,956	8,140	8,559	9,134	9,506	10,539	10,011	8,667	6,986	5,232	4,023	3,333	7,343
2004	94,407	1,827	8,083	8,736	8,975	9,380	10,491	10,196	8,940	7,398	5,447	4,146	3,369	7,421
2005	95,736	1,882	8,039	8,970	8,797	9,394	10,329	10,379	9,233	7,841	5,682	4,281	3,408	7,501
2006	96,945	1,946	7,974	9,184	8,676	9,455	10,098	10,511	9,522	8,135	5,988	4,413	3,446	7,596
2007	98,218	2,054	7,903	9,352	8,693	9,438	9,859	10,584	9,795	8,310	6,435	4,661	3,519	7,615
<i>Insured for disability benefits<sup>a</sup></i>														
<i>Total</i>														
1970	74,504	3,860	12,432	9,858	7,257	6,743	7,399	7,817	7,250	6,486	5,401	...	...	...
1975	85,305	4,948	14,144	13,289	9,313	7,610	7,271	7,762	7,892	7,035	6,041	...	...	...
1980	100,329	6,341	17,410	16,104	12,997	9,788	8,267	7,628	7,888	7,669	6,238	...	...	...
1985	109,572	4,105	15,868	17,976	15,851	13,683	10,661	8,747	7,780	7,763	7,138	...	...	...
1990	120,081	4,541	15,023	17,954	17,691	16,099	14,339	10,991	8,759	7,569	7,116	...	...	...
1991	121,530	4,047	14,788	17,620	17,946	16,653	14,890	11,743	9,075	7,700	7,070	...	...	...
1992	122,883	3,655	14,295	17,188	18,204	17,178	15,203	12,610	9,683	7,823	7,045	...	...	...
1993	124,430	3,461	13,945	16,758	18,341	17,646	15,672	13,262	10,261	8,093	6,991	...	...	...
1994	126,205	3,514	13,639	16,433	18,358	17,957	16,234	14,029	10,724	8,310	7,009	...	...	...
1995	128,233	3,763	13,374	16,409	18,068	18,291	16,787	14,823	11,095	8,571	7,051	...	...	...
1996	130,315	4,021	13,206	16,440	17,665	18,507	17,278	15,328	11,839	8,889	7,142	...	...	...
1997	132,352	4,170	13,408	16,307	17,224	18,635	17,699	15,553	12,664	9,451	7,242	...	...	...
1998	134,646	4,432	13,712	16,151	16,840	18,717	18,082	15,964	13,288	10,000	7,462	...	...	...
1999	137,079	4,666	14,089	15,905	16,638	18,729	18,383	16,525	14,025	10,437	7,683	...	...	...
2000	139,535	4,741	14,589	15,532	16,725	18,506	18,766	17,087	14,850	10,798	7,941	...	...	...
2001	141,736	4,651	14,922	15,294	16,852	18,194	19,026	17,637	15,378	11,525	8,255	...	...	...
2002	143,481	4,276	14,958	15,446	16,813	17,862	19,309	18,160	15,579	12,356	8,722	...	...	...
2003	144,619	3,806	14,778	15,573	16,608	17,475	19,353	18,549	15,994	12,977	9,261	245	...	...
2004	145,874	3,507	14,620	15,797	16,277	17,220	19,265	18,833	16,516	13,660	9,668	511	...	...
2005	148,065	3,617	14,613	16,313	15,959	17,274	19,021	19,149	17,019	14,410	9,894	796	...	...
2006	150,191	3,743	14,500	16,773	15,764	17,397	18,617	19,389	17,549	14,899	10,450	1,110	...	...
2007	152,338	3,965	14,392	17,145	15,832	17,361	18,178	19,510	18,056	15,181	11,187	1,532	...	...
<i>Male</i>														
1970	49,847	2,550	7,622	6,519	5,331	4,956	5,191	5,218	4,722	4,224	3,512	...	...	...
1975	54,323	3,004	8,274	8,191	6,400	5,320	4,911	5,037	4,977	4,389	3,822	...	...	...
1980	60,140	3,586	9,607	9,218	8,068	6,348	5,238	4,733	4,833	4,672	3,837	...	...	...
1985	62,896	2,219	8,650	9,952	9,169	8,105	6,319	5,124	4,561	4,570	4,227	...	...	...
1990	66,898	2,424	8,039	9,749	9,909	9,157	8,070	6,175	4,941	4,319	4,116	...	...	...
1991	67,380	2,145	7,907	9,549	9,985	9,435	8,309	6,553	5,064	4,380	4,052	...	...	...
1992	67,837	1,906	7,644	9,296	10,095	9,691	8,432	6,982	5,363	4,425	4,003	...	...	...
1993	68,435	1,806	7,426	9,042	10,177	9,892	8,650	7,287	5,665	4,532	3,959	...	...	...
1994	69,150	1,829	7,263	8,824	10,156	10,028	8,944	7,651	5,878	4,632	3,946	...	...	...
1995	69,979	1,957	7,079	8,774	9,971	10,186	9,244	8,020	6,054	4,737	3,957	...	...	...
1996	70,815	2,068	6,948	8,747	9,720	10,272	9,509	8,252	6,435	4,863	4,003	...	...	...
1997	71,658	2,146	6,996	8,656	9,444	10,303	9,724	8,343	6,848	5,152	4,047	...	...	...
1998	72,608	2,276	7,117	8,516	9,186	10,342	9,892	8,549	7,149	5,444	4,138	...	...	...
1999	73,646	2,401	7,275	8,349	9,006	10,321	10,031	8,846	7,503	5,660	4,254	...	...	...

(Continued)

#### 4.C OASDI: Insured Workers

**Table 4.C2—Estimated number, insured status, sex, and age, December 31, 1970–2007, 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 for disability benefits<sup>a</sup> (cont.)</i>														
<i>Male (cont.)</i>														
2000	74,846	2,434	7,540	8,134	9,075	10,170	10,230	9,167	7,892	5,844	4,360	...	...	...
2001	75,768	2,388	7,693	7,988	9,083	9,983	10,335	9,452	8,136	6,207	4,502	...	...	...
2002	76,433	2,176	7,713	8,018	9,030	9,765	10,450	9,723	8,209	6,615	4,736	...	...	...
2003	76,818	1,926	7,601	8,060	8,856	9,541	10,475	9,890	8,405	6,912	5,018	134	...	...
2004	77,334	1,754	7,530	8,162	8,653	9,369	10,434	10,026	8,674	7,235	5,221	277	...	...
2005	78,278	1,810	7,554	8,436	8,481	9,378	10,275	10,162	8,894	7,581	5,277	428	...	...
2006	79,154	1,872	7,482	8,667	8,352	9,405	10,019	10,257	9,133	7,786	5,579	602	...	...
2007	80,046	1,986	7,409	8,854	8,371	9,344	9,753	10,304	9,384	7,877	5,937	829	...	...
<i>Female</i>														
1970	24,656	1,310	4,810	3,339	1,926	1,787	2,208	2,599	2,527	2,262	1,889	...	...	...
1975	30,982	1,945	5,870	5,098	2,913	2,290	2,360	2,726	2,915	2,646	2,219	...	...	...
1980	40,189	2,755	7,804	6,886	4,929	3,441	3,028	2,894	3,055	2,997	2,401	...	...	...
1985	46,676	1,886	7,218	8,025	6,682	5,578	4,342	3,622	3,219	3,193	2,911	...	...	...
1990	53,183	2,116	6,984	8,206	7,782	6,942	6,269	4,816	3,818	3,250	3,000	...	...	...
1991	54,150	1,902	6,881	8,071	7,960	7,217	6,581	5,190	4,010	3,320	3,019	...	...	...
1992	55,046	1,749	6,652	7,892	8,109	7,487	6,771	5,628	4,319	3,398	3,041	...	...	...
1993	55,995	1,656	6,519	7,715	8,165	7,754	7,022	5,974	4,597	3,561	3,033	...	...	...
1994	57,055	1,685	6,376	7,609	8,202	7,929	7,289	6,378	4,845	3,678	3,063	...	...	...
1995	58,254	1,806	6,295	7,635	8,097	8,105	7,544	6,803	5,042	3,834	3,094	...	...	...
1996	59,500	1,953	6,258	7,693	7,946	8,234	7,769	7,077	5,404	4,026	3,139	...	...	...
1997	60,694	2,024	6,412	7,651	7,780	8,332	7,975	7,210	5,816	4,298	3,196	...	...	...
1998	62,038	2,156	6,595	7,635	7,654	8,376	8,190	7,415	6,139	4,555	3,324	...	...	...
1999	63,433	2,265	6,813	7,556	7,633	8,408	8,351	7,679	6,523	4,777	3,429	...	...	...
2000	64,689	2,307	7,049	7,398	7,651	8,336	8,535	7,920	6,958	4,954	3,581	...	...	...
2001	65,968	2,263	7,230	7,306	7,770	8,211	8,691	8,186	7,242	5,318	3,753	...	...	...
2002	67,048	2,101	7,244	7,428	7,783	8,098	8,859	8,437	7,370	5,742	3,987	...	...	...
2003	67,801	1,880	7,177	7,513	7,752	7,934	8,878	8,659	7,589	6,065	4,243	111	...	...
2004	68,540	1,753	7,090	7,635	7,624	7,850	8,831	8,808	7,842	6,426	4,447	234	...	...
2005	69,788	1,807	7,059	7,878	7,478	7,896	8,746	8,987	8,125	6,828	4,616	368	...	...
2006	71,037	1,871	7,018	8,106	7,412	7,992	8,598	9,132	8,415	7,113	4,871	507	...	...
2007	72,291	1,979	6,983	8,290	7,461	8,017	8,425	9,206	8,671	7,305	5,250	703	...	...

SOURCE: Social Security Administration, Continuous Work History Sample, 1 percent sample.

NOTES: 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, 2003–2007 (in thousands)**

Age at end of year	2003		2004		2005		2006		2007	
	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured
<b>Total</b>										
Total	298,329	<sup>a</sup> 88	301,257	<sup>a</sup> 88	303,960	<sup>a</sup> 88	306,498	<sup>a</sup> 88	309,040	<sup>a</sup> 88
Under 15	63,184	<sup>b</sup>	63,260	<sup>b</sup>	63,137	<sup>b</sup>	63,031	<sup>b</sup>	62,990	<sup>b</sup>
15–19	20,694	19	21,004	17	21,376	18	21,730	18	22,007	19
20–24	20,846	80	20,992	79	21,050	78	21,080	77	21,121	76
25–29	19,696	89	20,139	89	20,591	89	21,015	89	21,361	89
30–34	20,953	90	20,716	90	20,358	89	20,085	89	20,131	89
35–39	21,661	92	21,500	91	21,596	91	21,720	91	21,678	90
40–44	23,519	93	23,467	93	23,203	93	22,780	92	22,325	92
45–49	22,440	92	22,794	92	23,141	93	23,353	93	23,451	93
50–54	19,629	91	20,149	92	20,709	92	21,255	92	21,780	92
55–59	16,391	89	17,135	90	18,017	90	18,528	91	18,758	91
60–64	12,688	87	13,117	87	13,479	88	14,201	88	15,080	89
65–69	10,080	84	10,298	84	10,536	85	10,869	85	11,366	86
70–74	8,674	80	8,637	81	8,654	81	8,704	82	8,835	82
75 or older	17,873	75	18,048	76	18,113	76	18,148	77	18,155	78
<b>Male</b>										
Subtotal	147,787	<sup>a</sup> 92	149,346	<sup>a</sup> 92	150,735	<sup>a</sup> 92	152,052	<sup>a</sup> 92	153,372	<sup>a</sup> 91
Under 15	32,287	<sup>b</sup>	32,324	<sup>b</sup>	32,260	<sup>b</sup>	32,208	<sup>b</sup>	32,187	<sup>b</sup>
15–19	10,603	19	10,753	17	10,935	17	11,110	18	11,250	18
20–24	10,776	79	10,845	78	10,851	77	10,837	76	10,833	75
25–29	10,130	88	10,376	88	10,612	88	10,838	88	11,018	89
30–34	10,683	92	10,574	91	10,393	90	10,259	90	10,292	89
35–39	11,001	94	10,931	94	10,981	93	11,042	93	11,017	92
40–44	11,845	95	11,837	95	11,714	95	11,511	95	11,291	94
45–49	11,199	96	11,384	96	11,566	96	11,681	96	11,738	96
50–54	9,706	96	9,970	96	10,251	95	10,528	96	10,796	96
55–59	8,032	96	8,402	95	8,837	95	9,087	95	9,198	96
60–64	6,120	95	6,331	95	6,507	95	6,866	95	7,303	95
65–69	4,745	94	4,856	93	4,975	94	5,138	94	5,383	94
70–74	3,907	92	3,904	93	3,927	93	3,966	93	4,042	93
75 or older	6,753	90	6,862	91	6,926	91	6,980	92	7,023	92
<b>Female</b>										
Subtotal	150,542	<sup>a</sup> 83	151,910	<sup>a</sup> 84	153,225	<sup>a</sup> 84	154,446	<sup>a</sup> 84	155,668	<sup>a</sup> 84
Under 15	30,897	<sup>b</sup>	30,936	<sup>b</sup>	30,877	<sup>b</sup>	30,823	<sup>b</sup>	30,803	<sup>b</sup>
15–19	10,092	19	10,251	18	10,441	18	10,619	18	10,757	19
20–24	10,069	81	10,147	80	10,199	79	10,243	78	10,288	77
25–29	9,566	89	9,763	89	9,979	90	10,176	90	10,343	90
30–34	10,270	89	10,142	88	9,965	88	9,826	88	9,840	88
35–39	10,660	89	10,569	89	10,615	88	10,678	89	10,661	89
40–44	11,674	90	11,630	90	11,489	90	11,269	90	11,034	89
45–49	11,241	89	11,411	89	11,575	90	11,672	90	11,712	90
50–54	9,924	87	10,179	88	10,458	88	10,727	89	10,984	89
55–59	8,359	84	8,734	85	9,179	85	9,441	86	9,560	87
60–64	6,568	80	6,787	80	6,972	82	7,335	82	7,777	83
65–69	5,336	75	5,442	76	5,561	77	5,730	77	5,983	78
70–74	4,767	70	4,734	71	4,727	72	4,738	73	4,794	73
75 or older	11,120	66	11,186	66	11,187	67	11,168	68	11,132	68

SOURCE: U.S. 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 or Al Winters (410) 965-3024.

## 4.C OASDI: Insured Workers

**Table 4.C6—Period life table, 2003**

Exact age	Male			Female			Exact age	Male			Female		
	Death probability <sup>a</sup>	Number of lives <sup>b</sup>	Life expectancy	Death probability <sup>a</sup>	Number of lives <sup>b</sup>	Life expectancy		Death probability <sup>a</sup>	Number of lives <sup>b</sup>	Life expectancy	Death probability <sup>a</sup>	Number of lives <sup>b</sup>	Life expectancy
0	0.007613	100,000	74.40	0.006087	100,000	79.60	60	0.012263	84,692	20.00	0.007740	90,847	23.21
1	0.000519	99,239	73.97	0.000412	99,391	79.09	61	0.013407	83,653	19.24	0.008514	90,144	22.39
2	0.000367	99,187	73.01	0.000298	99,350	78.12	62	0.014617	82,532	18.50	0.009320	89,376	21.58
3	0.000286	99,151	72.04	0.000217	99,321	77.15	63	0.015883	81,326	17.76	0.010148	88,543	20.78
4	0.000215	99,122	71.06	0.000172	99,299	76.16	64	0.017236	80,034	17.04	0.011023	87,645	19.98
5	0.000191	99,101	70.07	0.000152	99,282	75.18	65	0.018751	78,654	16.33	0.012005	86,678	19.20
6	0.000178	99,082	69.08	0.000139	99,267	74.19	66	0.020447	77,180	15.64	0.013118	85,638	18.43
7	0.000167	99,065	68.10	0.000129	99,253	73.20	67	0.022287	75,601	14.95	0.014348	84,514	17.67
8	0.000149	99,048	67.11	0.000120	99,240	72.21	68	0.024278	73,917	14.28	0.015705	83,302	16.92
9	0.000127	99,033	66.12	0.000111	99,229	71.22	69	0.026454	72,122	13.62	0.017209	81,994	16.18
10	0.000111	99,021	65.13	0.000105	99,217	70.22	70	0.028904	70,214	12.98	0.018938	80,583	15.45
11	0.000120	99,010	64.13	0.000110	99,207	69.23	71	0.031641	68,185	12.35	0.020871	79,057	14.74
12	0.000176	98,998	63.14	0.000131	99,196	68.24	72	0.034622	66,027	11.74	0.022929	77,407	14.05
13	0.000293	98,980	62.15	0.000173	99,183	67.25	73	0.037855	63,741	11.14	0.025096	75,632	13.36
14	0.000452	98,951	61.17	0.000231	99,166	66.26	74	0.041397	61,328	10.56	0.027451	73,734	12.70
15	0.000627	98,907	60.20	0.000296	99,143	65.27	75	0.045443	58,789	9.99	0.030201	71,710	12.04
16	0.000792	98,845	59.24	0.000357	99,114	64.29	76	0.049973	56,118	9.45	0.033375	69,544	11.40
17	0.000944	98,766	58.28	0.000407	99,078	63.32	77	0.054805	53,314	8.92	0.036834	67,223	10.78
18	0.001072	98,673	57.34	0.000437	99,038	62.34	78	0.059912	50,392	8.41	0.040577	64,747	10.17
19	0.001178	98,567	56.40	0.000454	98,995	61.37	79	0.065457	47,373	7.91	0.044735	62,120	9.58
20	0.001287	98,451	55.46	0.000469	98,950	60.40	80	0.071687	44,272	7.43	0.049527	59,341	9.00
21	0.001389	98,325	54.53	0.000487	98,903	59.42	81	0.078793	41,098	6.96	0.055078	56,402	8.45
22	0.001449	98,188	53.61	0.000501	98,855	58.45	82	0.086813	37,860	6.52	0.061373	53,295	7.91
23	0.001454	98,046	52.69	0.000510	98,806	57.48	83	0.095842	34,573	6.09	0.068476	50,024	7.39
24	0.001421	97,903	51.76	0.000517	98,755	56.51	84	0.105909	31,260	5.68	0.076467	46,599	6.90
25	0.001374	97,764	50.84	0.000525	98,704	55.54	85	0.117017	27,949	5.29	0.085425	43,036	6.43
26	0.001336	97,630	49.90	0.000535	98,652	54.57	86	0.129170	24,678	4.93	0.095418	39,359	5.98
27	0.001313	97,499	48.97	0.000549	98,600	53.60	87	0.142383	21,491	4.59	0.106505	35,604	5.56
28	0.001316	97,371	48.03	0.000569	98,546	52.63	88	0.156680	18,431	4.26	0.118730	31,812	5.16
29	0.001341	97,243	47.10	0.000596	98,489	51.66	89	0.172092	15,543	3.96	0.132121	28,035	4.79
30	0.001375	97,113	46.16	0.000627	98,431	50.69	90	0.188644	12,868	3.68	0.146696	24,331	4.45
31	0.001414	96,979	45.22	0.000665	98,369	49.72	91	0.206354	10,441	3.42	0.162464	20,761	4.13
32	0.001468	96,842	44.29	0.000714	98,304	48.75	92	0.225225	8,286	3.19	0.179422	17,388	3.83
33	0.001539	96,700	43.35	0.000778	98,233	47.79	93	0.245249	6,420	2.97	0.197556	14,269	3.56
34	0.001627	96,551	42.42	0.000855	98,157	46.82	94	0.266402	4,845	2.77	0.216842	11,450	3.31
35	0.001732	96,394	41.48	0.000940	98,073	45.86	95	0.287448	3,555	2.59	0.236379	8,967	3.09
36	0.001853	96,227	40.56	0.001033	97,981	44.91	96	0.308073	2,533	2.43	0.255898	6,847	2.89
37	0.001994	96,049	39.63	0.001136	97,880	43.95	97	0.327943	1,753	2.29	0.275103	5,095	2.71
38	0.002157	95,857	38.71	0.001247	97,769	43.00	98	0.346718	1,178	2.17	0.293679	3,693	2.55
39	0.002340	95,650	37.79	0.001367	97,647	42.05	99	0.364054	769	2.06	0.311300	2,609	2.40
40	0.002542	95,427	36.88	0.001498	97,513	41.11	100	0.382257	489	1.95	0.329978	1,797	2.25
41	0.002764	95,184	35.97	0.001638	97,367	40.17	101	0.401370	302	1.84	0.349776	1,204	2.12
42	0.003009	94,921	35.07	0.001783	97,208	39.24	102	0.421438	181	1.74	0.370763	783	1.99
43	0.003279	94,635	34.17	0.001932	97,034	38.31	103	0.442510	105	1.64	0.393008	493	1.86
44	0.003571	94,325	33.28	0.002087	96,847	37.38	104	0.464635	58	1.55	0.416589	299	1.74
45	0.003890	93,988	32.40	0.002259	96,645	36.46	105	0.487867	31	1.46	0.441584	174	1.63
46	0.004230	93,623	31.53	0.002445	96,426	35.54	106	0.512261	16	1.37	0.468079	97	1.52
47	0.004578	93,227	30.66	0.002633	96,191	34.62	107	0.537874	8	1.29	0.496164	52	1.42
48	0.004930	92,800	29.80	0.002823	95,937	33.71	108	0.564767	4	1.21	0.525934	26	1.32
49	0.005293	92,342	28.94	0.003020	95,666	32.81	109	0.593006	2	1.14	0.557490	12	1.22

(Continued)

Table 4.C6—Period life table, 2003—Continued

Exact age	Male			Female			Exact age	Male			Female		
	Death probability <sup>a</sup>	Number of lives <sup>b</sup>	Life expectancy	Death probability <sup>a</sup>	Number of lives <sup>b</sup>	Life expectancy		Death probability <sup>a</sup>	Number of lives <sup>b</sup>	Life expectancy	Death probability <sup>a</sup>	Number of lives <sup>b</sup>	Life expectancy
50	0.005696	91,853	28.09	0.003240	95,378	31.91	110	0.622656	1	1.06	0.590939	5	1.13
51	0.006138	91,330	27.25	0.003493	95,069	31.01	111	0.653789	0	0.99	0.626396	2	1.05
52	0.006594	90,770	26.42	0.003778	94,736	30.11	112	0.686478	0	0.93	0.663979	1	0.97
53	0.007063	90,171	25.59	0.004102	94,379	29.23	113	0.720802	0	0.86	0.703818	0	0.89
54	0.007561	89,534	24.77	0.004467	93,991	28.34	114	0.756842	0	0.80	0.746047	0	0.82
55	0.008108	88,857	23.95	0.004873	93,572	27.47	115	0.794684	0	0.74	0.790810	0	0.75
56	0.008731	88,137	23.14	0.005326	93,116	26.60	116	0.834418	0	0.69	0.834418	0	0.69
57	0.009449	87,367	22.34	0.005833	92,620	25.74	117	0.876139	0	0.63	0.876139	0	0.63
58	0.010277	86,542	21.55	0.006401	92,079	24.89	118	0.919946	0	0.58	0.919946	0	0.58
59	0.011212	85,652	20.77	0.007031	91,490	24.05	119	0.965943	0	0.53	0.965943	0	0.53

SOURCES: National Center for Health Statistics and the U.S. Census Bureau.

NOTE: The period life expectancy at a given age for 2003 represents the average number of years of life remaining if a group of persons at that age were to experience the mortality rates for 2003 over the course of their remaining life.

- a. Probability of dying within one year.  
b. Number of survivors out of 100,000 born alive.

CONTACT: Felicitie Bell (410) 965-3020 or Al Winters (410) 965-3024.





## Section 5. Old-Age, Survivors, and Disability Insurance

### Current-Pay Benefits

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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 2006**

Type of benefit	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Total, OASDI	49,122,624	955.50	40,554,883	989.70	5,045,907	813.30	3,361,291	765.10
OASI <sup>d</sup>	40,510,508	981.60	34,592,341	1,009.50	3,542,522	838.10	2,287,754	785.70
Retirement benefits	33,944,682	998.40	29,736,351	1,019.40	2,771,817	883.40	1,371,860	779.00
Retired workers	30,976,143	1,044.40	27,167,053	1,065.20	2,556,928	920.30	1,194,328	842.30
Spouses of retired workers	2,478,599	517.60	2,215,657	533.10	116,900	431.30	139,969	348.00
Children of retired workers	489,940	518.10	353,641	549.90	97,989	460.90	37,563	369.90
Survivor benefits	6,565,824	894.80	4,855,988	948.70	770,705	675.00	915,894	795.70
Children of deceased workers	1,898,862	683.70	1,138,849	740.40	377,157	571.30	373,322	624.70
Widowed mothers and fathers	171,453	756.60	110,485	813.20	23,013	651.80	37,163	653.90
Nondisabled widow(er)s	4,273,442	1,007.80	3,487,755	1,031.40	337,536	804.50	436,240	976.30
Disabled widow(er)s	220,178	630.70	117,928	640.50	32,802	550.20	68,476	653.40
Parents of deceased workers	1,889	892.20	971	918.30	197	858.20	693	865.80
DI	8,612,116	833.10	5,962,542	874.70	1,503,385	755.00	1,073,537	721.20
Disabled workers	6,806,918	977.70	4,785,617	1,014.80	1,146,498	908.30	812,320	874.60
Spouses of disabled workers	153,470	257.80	115,255	270.80	16,954	233.40	20,519	206.40
Children of disabled workers	1,651,728	290.40	1,061,670	309.00	339,933	264.20	240,698	247.60

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: 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.

- a. Includes 160,543 persons of unknown race. In years prior to 1993, persons of unknown race were included with White.
- 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.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).
- d. Includes special age-72 beneficiaries.

CONTACT: Diane Wallace (410) 965-0165.

## 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 2006**

Age	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>All retired workers</i>								
Total	30,976,143	1,044.40	27,167,053	1,065.20	2,556,928	920.30	1,194,328	842.30
62–64	2,840,334	937.70	2,446,765	956.00	248,388	872.50	144,273	740.40
62	711,159	911.70	604,587	930.30	63,194	860.20	42,882	726.50
63	1,017,097	927.90	878,064	945.30	89,782	862.80	49,050	736.70
64	1,112,078	963.40	964,114	982.00	95,412	889.90	52,341	755.40
65–69	8,098,996	1,092.30	6,930,263	1,117.10	743,320	985.80	420,724	873.70
65	1,371,603	1,046.80	1,172,052	1,068.60	122,549	958.30	75,888	853.00
66	1,779,436	1,121.90	1,516,221	1,148.20	165,917	1,012.50	96,415	898.00
67	1,700,124	1,105.70	1,450,787	1,131.40	158,543	996.30	89,824	885.80
68	1,676,157	1,096.70	1,440,736	1,121.60	151,686	985.10	82,841	870.70
69	1,571,676	1,079.30	1,350,467	1,104.10	144,625	967.70	75,756	852.30
70–74	6,833,648	1,030.40	5,930,780	1,053.10	609,593	911.40	287,593	817.90
70	1,494,712	1,043.60	1,289,613	1,067.00	133,597	933.50	70,369	824.00
71	1,444,260	1,024.50	1,248,887	1,047.30	131,611	908.90	62,803	815.10
72	1,369,609	1,020.20	1,189,450	1,042.50	122,738	903.70	56,334	808.20
73	1,265,409	1,024.20	1,101,385	1,046.70	111,431	902.40	51,470	811.10
74	1,259,658	1,038.90	1,101,445	1,061.40	110,216	905.20	46,617	831.70
75–79	5,581,592	1,031.50	4,968,920	1,051.10	425,934	888.40	173,060	835.40
75	1,204,804	1,028.30	1,066,925	1,048.50	94,685	894.80	41,328	821.60
76	1,185,011	1,025.10	1,051,500	1,045.30	92,161	886.20	39,437	820.00
77	1,100,048	1,023.10	978,802	1,042.70	84,238	880.90	34,035	832.20
78	1,069,027	1,037.60	954,947	1,056.60	79,903	888.90	30,686	853.50
79	1,022,702	1,045.10	916,746	1,063.90	74,947	891.10	27,574	861.60
80–84	4,121,083	1,034.20	3,717,326	1,051.00	287,062	880.00	99,693	868.50
80	950,200	1,034.70	853,406	1,052.50	68,549	882.30	24,352	856.50
81	892,170	1,048.40	803,261	1,066.00	63,166	891.70	22,112	877.00
82	840,171	1,033.30	758,920	1,049.60	58,075	879.90	19,784	872.20
83	754,946	1,025.20	683,203	1,041.10	50,912	871.50	17,745	868.20
84	683,596	1,026.00	618,536	1,042.00	46,360	870.10	15,700	870.90
85–89	2,343,187	1,056.00	2,130,901	1,072.00	154,214	880.60	47,185	912.20
85	633,857	1,027.90	576,808	1,042.90	41,228	867.90	13,022	881.10
86	543,741	1,028.90	494,227	1,044.60	35,701	860.00	11,306	885.40
87	441,562	1,047.00	399,449	1,063.90	30,928	871.00	9,071	908.60
88	395,173	1,094.30	360,637	1,110.10	25,127	908.90	7,539	955.70
89	328,854	1,120.90	299,780	1,138.10	21,230	920.40	6,247	978.10
90–94	914,343	1,153.70	827,512	1,171.70	65,301	950.30	17,258	1,041.40
95 or older	242,960	1,038.30	214,586	1,062.70	23,116	829.40	4,542	934.90
<i>Men</i>								
Subtotal	15,869,182	1,177.50	13,976,312	1,205.90	1,199,588	1,002.40	668,905	903.50
62–64	1,424,421	1,108.00	1,223,471	1,142.00	125,908	947.40	74,592	822.00
62	350,184	1,083.00	297,496	1,117.90	31,681	934.10	20,766	813.20
63	510,867	1,095.40	439,297	1,128.50	45,423	936.50	26,056	815.90
64	563,370	1,134.80	486,678	1,169.00	48,804	966.20	27,770	834.20
65–69	4,357,395	1,263.30	3,740,099	1,302.40	371,586	1,079.50	243,717	946.50
65	714,085	1,226.10	610,629	1,264.20	61,884	1,046.50	41,178	931.90
66	961,090	1,301.40	821,533	1,343.40	82,725	1,108.50	56,387	975.50
67	920,973	1,277.00	788,520	1,317.20	79,272	1,091.90	52,770	957.70
68	908,330	1,263.00	783,706	1,300.80	75,527	1,080.10	48,711	940.00
69	852,917	1,237.20	735,711	1,274.20	72,178	1,060.30	44,671	917.00

(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 2006—Continued

Age	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	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	3,678,192	1,164.70	3,209,827	1,196.30	298,061	991.60	167,490	870.60
70	806,120	1,187.20	698,380	1,221.50	65,847	1,018.70	41,484	879.30
71	778,500	1,159.60	676,616	1,191.70	64,683	990.40	36,746	870.00
72	738,490	1,150.80	644,833	1,181.80	60,019	982.50	33,067	858.50
73	680,583	1,153.10	596,134	1,183.80	54,092	979.70	29,724	860.80
74	674,499	1,170.40	593,864	1,200.60	53,420	981.70	26,469	883.70
75–79	2,943,712	1,149.60	2,643,362	1,173.80	198,557	962.70	95,280	884.80
75	644,927	1,151.50	575,719	1,177.50	44,980	968.60	23,187	872.90
76	632,738	1,144.90	566,020	1,170.40	43,666	960.60	21,992	867.00
77	581,258	1,137.60	521,994	1,161.20	39,204	955.60	18,677	878.40
78	557,649	1,155.30	502,815	1,178.20	36,697	963.20	16,581	905.00
79	527,140	1,160.40	476,814	1,182.60	34,010	965.10	14,843	915.20
80–84	2,027,845	1,125.20	1,843,958	1,144.00	123,598	943.80	53,375	909.10
80	482,565	1,138.80	437,381	1,159.40	30,575	949.10	12,971	902.90
81	443,076	1,153.20	402,476	1,173.20	27,606	964.20	11,554	925.30
82	411,044	1,124.60	374,139	1,143.00	24,876	943.80	10,662	914.10
83	365,961	1,102.50	333,438	1,120.00	21,584	929.40	9,682	902.30
84	325,199	1,092.90	296,524	1,109.90	18,957	921.60	8,506	898.10
85–89	1,037,519	1,108.90	952,025	1,124.20	57,343	931.30	24,144	937.20
85	295,781	1,082.80	271,528	1,097.60	16,196	913.90	6,979	908.60
86	247,551	1,068.10	227,103	1,082.80	13,679	898.80	5,812	901.30
87	193,894	1,090.60	176,983	1,106.40	11,533	917.60	4,625	927.80
88	166,273	1,158.50	153,026	1,173.80	8,878	970.40	3,734	986.40
89	134,020	1,206.80	123,385	1,222.70	7,057	1,007.90	2,994	1,026.90
90–94	332,844	1,279.00	304,039	1,296.10	19,221	1,066.20	8,107	1,112.40
95 or older	67,254	1,137.20	59,531	1,162.30	5,314	916.70	2,200	962.20
<i>Women</i>								
Subtotal	15,106,961	904.60	13,190,741	916.10	1,357,340	847.70	525,423	764.40
62–64	1,415,913	766.40	1,223,294	770.00	122,480	795.50	69,681	653.20
62	360,975	745.40	307,091	748.60	31,513	785.80	22,116	645.20
63	506,230	758.80	438,767	761.80	44,359	787.30	22,994	646.90
64	548,708	787.30	477,436	791.40	46,608	810.00	24,571	666.20
65–69	3,741,601	893.00	3,190,164	899.80	371,734	892.10	177,007	773.40
65	657,518	852.00	561,423	855.80	60,665	868.30	34,710	759.30
66	818,346	911.00	694,688	917.50	83,192	917.00	40,028	788.80
67	779,151	903.10	662,267	910.20	79,271	900.70	37,054	783.30
68	767,827	899.90	657,030	907.70	76,159	890.80	34,130	771.80
69	718,759	891.80	614,756	900.50	72,447	875.40	31,085	759.30
70–74	3,155,456	873.90	2,720,953	884.20	311,532	834.70	120,103	744.40
70	688,592	875.40	591,233	884.60	67,750	850.60	28,885	744.40
71	665,760	866.40	572,271	876.60	66,928	830.10	26,057	737.60
72	631,119	867.30	544,617	877.50	62,719	828.30	23,267	736.80
73	584,826	874.10	505,251	885.00	57,339	829.50	21,746	743.20
74	585,159	887.30	507,581	898.50	56,796	833.20	20,148	763.40
75–79	2,637,880	899.60	2,325,558	911.60	227,377	823.60	77,780	774.80
75	559,877	886.30	491,206	897.30	49,705	828.00	18,141	756.20
76	552,273	887.90	485,480	899.60	48,495	819.30	17,445	760.80
77	518,790	894.90	456,808	907.20	45,034	815.80	15,358	776.00
78	511,378	909.30	452,132	921.40	43,206	825.90	14,105	792.90
79	495,562	922.60	439,932	935.20	40,937	829.70	12,731	799.20

(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 2006—Continued**

Age	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	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	2,093,238	946.10	1,873,368	959.40	163,464	831.80	46,318	821.70
80	467,635	927.30	416,025	940.10	37,974	828.50	11,381	803.50
81	449,094	945.00	400,785	958.20	35,560	835.50	10,558	824.20
82	429,127	945.80	384,781	958.80	33,199	832.00	9,122	823.40
83	388,985	952.50	349,765	965.80	29,328	828.90	8,063	827.20
84	358,397	965.40	322,012	979.50	27,403	834.40	7,194	838.60
85–89	1,305,668	1,014.00	1,178,876	1,029.80	96,871	850.60	23,041	886.00
85	338,076	979.90	305,280	994.20	25,032	838.10	6,043	849.30
86	296,190	996.30	267,124	1,012.20	22,022	835.80	5,494	868.60
87	247,668	1,012.90	222,466	1,030.00	19,395	843.30	4,446	888.70
88	228,900	1,047.70	207,611	1,063.10	16,249	875.30	3,805	925.70
89	194,834	1,061.80	176,395	1,078.90	14,173	876.90	3,253	933.10
90–94	581,499	1,082.00	523,473	1,099.50	46,080	902.00	9,151	978.50
95 or older	175,706	1,000.50	155,055	1,024.50	17,802	803.30	2,342	909.20

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: 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.

- a. Includes 57,834 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.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Diane Wallace (410) 965-0165.

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 2006

Age	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	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	6,806,918	977.70	4,785,617	1,014.80	1,146,498	908.30	812,320	874.60
Under 20	1,052	399.90	668	398.10	156	401.80	211	396.70
20–24	50,043	525.80	30,693	529.00	9,533	512.80	8,502	534.10
20	2,407	439.60	1,528	444.20	460	424.60	372	437.80
21	5,356	470.30	3,363	471.30	1,017	456.00	865	485.50
22	9,298	502.00	5,754	504.40	1,742	485.70	1,562	514.50
23	13,982	532.40	8,563	535.50	2,686	523.80	2,348	534.80
24	19,000	559.20	11,485	564.70	3,628	544.70	3,355	566.00
25–29	152,645	639.70	93,080	654.90	30,423	618.00	24,521	633.30
25	23,475	588.40	14,192	596.00	4,538	572.20	4,005	595.20
26	27,663	611.50	16,760	621.20	5,518	598.40	4,493	612.40
27	31,680	640.10	19,315	656.40	6,406	612.70	4,988	636.70
28	33,489	657.20	20,465	673.30	6,690	634.60	5,341	648.90
29	36,338	678.00	22,348	699.30	7,271	651.00	5,694	658.90
30–34	222,689	724.80	139,202	748.70	41,395	700.90	36,499	689.00
30	37,972	692.20	23,430	713.70	7,237	670.30	6,255	665.20
31	40,476	707.90	25,131	731.80	7,513	681.10	6,709	676.50
32	43,601	724.10	27,226	748.90	8,148	702.60	7,088	684.60
33	47,280	734.70	29,699	759.00	8,675	711.10	7,766	695.40
34	53,360	752.70	33,716	776.60	9,822	728.30	8,681	713.70
35–39	371,383	795.80	243,257	820.40	66,085	758.30	55,550	755.30
35	61,967	765.70	40,081	789.20	11,160	738.70	9,578	721.70
36	70,243	783.40	45,843	808.00	12,427	748.30	10,621	743.20
37	73,829	795.70	48,509	819.30	12,903	759.50	11,079	757.40
38	79,062	807.50	52,034	831.30	14,004	767.20	11,701	771.10
39	86,282	816.90	56,790	843.50	15,591	771.10	12,571	774.40
40–44	612,789	852.20	416,833	881.10	109,265	789.30	79,412	804.70
40	96,041	828.00	63,590	854.70	17,579	778.80	13,469	786.40
41	108,887	838.50	73,101	866.60	19,606	780.60	14,728	795.10
42	126,497	850.30	86,127	879.20	22,753	789.40	16,144	800.40
43	135,112	860.30	93,082	889.70	23,604	791.40	17,001	810.00
44	146,252	872.50	100,933	901.80	25,723	801.10	18,070	825.10
45–49	907,839	916.10	623,866	948.00	161,714	841.70	113,927	859.90
45	160,298	888.20	110,909	917.20	28,184	817.40	19,568	841.70
46	170,298	899.90	117,359	931.80	30,118	824.10	21,149	845.60
47	182,528	914.80	125,233	947.60	32,665	838.00	22,972	858.00
48	191,319	929.00	131,111	961.50	34,242	854.10	24,353	870.50
49	203,396	940.50	139,254	973.80	36,505	866.70	25,885	877.10
50–54	1,176,128	986.50	807,841	1,020.10	209,745	921.30	148,963	905.30
50	214,654	955.50	146,482	989.60	38,812	885.00	27,557	884.10
51	224,436	972.00	153,498	1,006.30	40,492	902.90	28,558	896.20
52	237,304	986.70	163,037	1,020.80	42,326	922.10	30,083	902.60
53	244,575	999.90	168,533	1,033.00	43,297	938.70	30,750	914.20
54	255,159	1,012.30	176,291	1,044.70	44,818	952.00	32,015	925.80
55–59	1,516,025	1,057.30	1,071,378	1,087.70	253,892	1,000.90	178,560	962.20
55	268,033	1,028.70	185,161	1,059.80	47,417	972.50	33,350	943.60
56	280,312	1,043.20	193,905	1,074.70	49,489	989.40	34,560	950.70
57	301,880	1,055.00	211,503	1,085.40	51,832	1,001.50	35,919	960.70
58	319,170	1,068.40	226,711	1,097.40	52,657	1,014.40	37,164	974.90
59	346,630	1,082.50	254,098	1,111.00	52,497	1,023.20	37,567	978.00

(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 2006—Continued**

Age	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	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	1,796,325	1,089.30	1,358,799	1,123.70	264,290	1,016.80	166,175	930.70
60	330,826	1,085.20	245,809	1,115.90	49,053	1,023.00	34,088	959.70
61	301,011	1,082.20	222,115	1,117.50	46,939	1,019.30	30,595	928.40
62	318,961	1,092.00	240,801	1,126.70	47,325	1,023.30	29,569	927.40
63	334,451	1,098.40	256,397	1,133.20	47,936	1,019.50	29,042	929.00
64	318,484	1,092.00	244,833	1,128.10	45,678	1,009.50	27,050	911.20
65	192,592	1,082.80	148,844	1,117.10	27,359	997.80	15,831	914.90
<i>Men</i>								
Subtotal	3,643,121	1,097.40	2,615,367	1,149.20	580,555	978.50	411,494	961.90
Under 20	611	407.00	395	402.20	84	386.40	122	423.10
20–24	29,420	535.30	18,167	540.30	5,346	517.60	5,106	542.60
20	1,425	443.30	917	453.30	257	411.50	221	439.00
21	3,185	479.50	2,011	483.20	564	457.10	541	489.20
22	5,505	509.80	3,452	512.50	954	487.30	957	525.90
23	8,315	541.70	5,120	546.00	1,518	530.20	1,426	545.00
24	10,990	571.30	6,667	579.60	2,053	552.40	1,961	575.30
25–29	84,002	653.30	51,273	671.50	16,093	623.00	13,923	647.60
25	13,390	600.70	8,130	609.60	2,497	583.30	2,312	606.60
26	15,575	624.00	9,440	636.40	2,989	603.50	2,625	625.20
27	17,430	655.10	10,660	674.30	3,377	619.60	2,831	653.20
28	18,253	671.80	11,176	692.30	3,498	637.70	2,999	662.20
29	19,354	694.40	11,867	719.80	3,732	654.40	3,156	677.40
30–34	115,225	745.80	71,821	775.10	20,555	709.50	19,726	708.70
30	20,128	709.40	12,483	736.30	3,601	673.10	3,443	681.40
31	21,068	725.70	12,977	754.10	3,761	685.60	3,704	696.10
32	22,533	745.90	14,156	776.30	4,031	711.20	3,711	702.00
33	24,094	756.80	15,031	786.30	4,326	720.40	4,102	718.40
34	27,402	778.50	17,174	808.30	4,836	743.90	4,766	734.80
35–39	193,448	824.90	125,706	855.60	33,532	775.60	30,387	779.10
35	31,914	791.70	20,422	822.00	5,610	753.40	5,221	740.30
36	36,242	810.00	23,453	841.00	6,229	761.50	5,753	765.10
37	38,641	822.50	25,314	851.30	6,458	776.50	6,090	779.00
38	41,354	838.00	26,834	868.40	7,257	783.20	6,469	800.10
39	45,297	850.30	29,683	882.30	7,978	794.70	6,854	800.40
40–44	322,471	897.10	218,654	932.50	56,433	816.50	43,163	844.00
40	50,618	863.80	33,265	896.10	9,048	803.60	7,487	815.70
41	57,139	876.50	38,153	910.40	10,161	804.10	7,992	827.90
42	66,449	894.90	44,948	930.40	11,808	817.70	8,845	839.70
43	71,193	907.70	49,025	943.50	12,177	817.60	9,167	855.00
44	77,072	926.50	53,263	962.70	13,239	832.60	9,672	872.70
45–49	481,242	987.60	334,053	1,028.50	83,932	881.60	58,480	924.50
45	84,643	945.50	58,673	983.00	14,616	849.30	10,383	890.30
46	90,410	963.00	62,767	1,002.70	15,523	859.10	11,133	903.80
47	96,545	987.30	66,960	1,028.60	16,860	879.20	11,815	923.40
48	101,790	1,005.00	70,624	1,046.40	17,904	897.90	12,346	939.20
49	107,854	1,025.20	75,029	1,068.60	19,029	911.40	12,803	956.80
50–54	619,122	1,094.20	436,677	1,138.70	106,686	982.70	70,480	1,002.00
50	113,197	1,046.40	78,641	1,090.80	20,146	935.60	13,443	967.30
51	118,391	1,071.30	83,080	1,115.70	20,721	959.80	13,545	985.60
52	125,025	1,093.80	88,275	1,138.80	21,504	982.00	14,159	998.70
53	128,585	1,115.00	91,280	1,158.30	21,939	1,004.90	14,293	1,021.40
54	133,924	1,135.30	95,401	1,179.40	22,376	1,025.40	15,040	1,032.40

(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 2006—Continued

Age	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Men (cont.)</i>								
55–59	814,662	1,206.10	592,835	1,247.90	127,487	1,093.80	87,210	1,099.70
55	141,942	1,159.80	101,359	1,201.20	23,791	1,050.90	15,610	1,070.20
56	150,356	1,179.50	107,445	1,221.50	24,997	1,073.10	16,512	1,082.20
57	162,822	1,200.20	117,616	1,241.80	26,065	1,091.90	17,633	1,095.90
58	171,755	1,225.20	125,383	1,266.20	26,217	1,114.60	18,574	1,118.30
59	187,787	1,250.20	141,032	1,290.50	26,417	1,133.10	18,881	1,124.70
60–65	982,918	1,278.90	765,786	1,323.30	130,407	1,152.50	82,897	1,077.20
60	179,012	1,262.30	136,569	1,304.40	24,417	1,140.90	16,953	1,108.90
61	163,834	1,264.20	124,419	1,311.00	23,306	1,149.30	15,313	1,070.20
62	174,374	1,282.30	135,701	1,327.10	23,374	1,159.90	14,661	1,072.10
63	183,102	1,294.50	144,627	1,338.90	23,548	1,161.80	14,372	1,075.50
64	175,562	1,289.70	139,287	1,334.50	22,364	1,153.10	13,448	1,061.30
65	107,034	1,279.00	85,183	1,321.30	13,398	1,148.40	8,150	1,062.40
<i>Women</i>								
Subtotal	3,163,797	839.80	2,170,250	852.70	565,943	836.30	400,826	785.00
Under 20	441	390.00	273	392.10	72	419.80	89	360.60
20–24	20,623	512.40	12,526	512.70	4,187	506.60	3,396	521.40
20	982	434.20	611	430.60	203	441.10	151	436.00
21	2,171	457.00	1,352	453.60	453	454.50	324	479.20
22	3,793	490.70	2,302	492.30	788	483.80	605	496.40
23	5,667	518.90	3,443	520.00	1,168	515.40	922	519.00
24	8,010	542.60	4,818	544.10	1,575	534.80	1,394	552.90
25–29	68,643	623.10	41,807	634.40	14,330	612.50	10,598	614.50
25	10,085	572.20	6,062	577.80	2,041	558.70	1,693	579.70
26	12,088	595.30	7,320	601.50	2,529	592.30	1,868	594.50
27	14,250	621.80	8,655	634.30	3,029	605.10	2,157	615.00
28	15,236	639.70	9,289	650.40	3,192	631.10	2,342	631.80
29	16,984	659.40	10,481	676.10	3,539	647.40	2,538	636.00
30–34	107,464	702.30	67,381	720.60	20,840	692.50	16,773	665.90
30	17,844	672.90	10,947	687.90	3,636	667.50	2,812	645.30
31	19,408	688.60	12,154	707.90	3,752	676.60	3,005	652.40
32	21,068	700.90	13,070	719.20	4,117	694.20	3,377	665.40
33	23,186	711.80	14,668	731.00	4,349	702.00	3,664	669.70
34	25,958	725.50	16,542	743.60	4,986	713.10	3,915	688.00
35–39	177,935	764.20	117,551	782.80	32,553	740.40	25,163	726.50
35	30,053	738.10	19,659	755.10	5,550	723.80	4,357	699.40
36	34,001	755.00	22,390	773.40	6,198	735.00	4,868	717.30
37	35,188	766.20	23,195	784.40	6,445	742.50	4,989	730.90
38	37,708	774.00	25,200	791.80	6,747	750.10	5,232	735.20
39	40,985	780.10	27,107	801.00	7,613	746.30	5,717	743.30
40–44	290,318	802.40	198,179	824.30	52,832	760.30	36,249	757.90
40	45,423	788.10	30,325	809.40	8,531	752.40	5,982	749.60
41	51,748	796.70	34,948	818.70	9,445	755.40	6,736	756.20
42	60,048	800.90	41,179	823.20	10,945	758.90	7,299	752.80
43	63,919	807.50	44,057	829.90	11,427	763.50	7,834	757.40
44	69,180	812.40	47,670	833.80	12,484	767.70	8,398	770.30
45–49	426,597	835.30	289,813	855.30	77,782	798.70	55,447	791.90
45	75,655	824.00	52,236	843.30	13,568	782.90	9,185	786.80
46	79,888	828.40	54,592	850.40	14,595	787.00	10,016	781.00
47	85,983	833.30	58,273	854.50	15,805	793.90	11,157	788.70
48	89,529	842.70	60,487	862.50	16,338	806.10	12,007	799.90
49	95,542	845.00	64,225	863.10	17,476	818.00	13,082	799.10

(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 2006—Continued**

Age	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	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	557,006	866.70	371,164	880.60	103,059	857.80	78,483	818.50
50	101,457	854.00	67,841	872.30	18,666	830.50	14,114	804.80
51	106,045	861.10	70,418	877.30	19,771	843.20	15,013	815.60
52	112,279	867.50	74,762	881.40	20,822	860.20	15,924	817.10
53	115,990	872.20	77,253	884.80	21,358	870.60	16,457	821.10
54	121,235	876.40	80,890	885.90	22,442	878.90	16,975	831.40
55–59	701,363	884.40	478,543	889.20	126,405	907.20	91,350	830.80
55	126,091	881.10	83,802	888.90	23,626	893.50	17,740	832.20
56	129,956	885.50	86,460	892.30	24,492	903.90	18,048	830.40
57	139,058	885.10	93,887	889.50	25,767	910.10	18,286	830.30
58	147,415	885.80	101,328	888.50	26,440	915.00	18,590	831.60
59	158,843	884.10	113,066	887.20	26,080	911.90	18,686	829.70
60–65	813,407	860.20	593,013	865.80	133,883	884.70	83,278	784.80
60	151,814	876.40	109,240	880.20	24,636	906.10	17,135	812.00
61	137,177	864.70	97,696	871.20	23,633	891.10	15,282	786.30
62	144,587	862.60	105,100	867.90	23,951	890.00	14,908	785.10
63	151,349	861.10	111,770	867.00	24,388	882.20	14,670	785.50
64	142,922	849.00	105,546	855.80	23,314	871.70	13,602	762.80
65	85,558	837.20	63,661	843.80	13,961	853.30	7,681	758.40

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: 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.

- a. Includes 62,483 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.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Diane Wallace (410) 965-0165.

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 2006

Basis of entitlement and age	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<b>All spouses</b>								
Total	2,632,069	502.40	2,330,912	520.10	133,854	406.20	160,488	329.90
<i>Wives</i>								
Subtotal	2,585,092	506.30	2,303,622	522.70	128,100	409.60	146,803	336.80
Entitlement based on care of children	125,719	288.30	89,888	312.20	16,332	259.50	18,916	202.50
Under 35	16,025	161.40	11,063	171.90	2,083	143.80	2,770	134.90
35–39	18,358	196.00	12,673	210.40	2,286	177.90	3,306	154.50
40–44	24,233	244.80	16,870	262.50	3,186	228.40	4,051	186.80
45–49	24,576	298.30	17,225	321.50	3,393	275.10	3,845	217.40
50–54	18,766	352.00	13,559	378.50	2,565	319.70	2,564	247.80
55–59	12,618	397.80	9,524	422.20	1,578	360.70	1,479	283.60
60–61	4,612	444.70	3,620	467.00	557	379.30	421	343.10
62–64	6,531	477.00	5,354	501.60	684	395.30	480	323.10
Entitlement based on age	2,459,373	517.50	2,213,734	531.30	111,768	431.50	127,887	356.70
62–64	274,271	455.10	238,622	472.20	13,956	376.90	21,234	315.00
62	64,922	439.80	56,200	455.20	3,415	371.50	5,140	316.90
63	97,101	448.70	84,621	465.60	4,868	371.00	7,468	309.40
64	112,248	469.50	97,801	487.70	5,673	385.40	8,626	318.70
65–69	651,922	520.80	570,091	539.90	34,368	434.30	46,625	352.30
65	129,555	498.20	112,756	517.10	7,017	407.70	9,591	343.50
66	133,789	517.80	116,355	537.80	7,139	429.30	10,142	352.60
67	130,716	524.80	114,053	544.70	6,888	437.30	9,615	353.20
68	129,860	531.60	114,161	550.10	6,744	447.50	8,806	358.20
69	128,002	531.50	112,766	549.70	6,580	451.70	8,471	355.00
70–74	597,788	524.90	536,213	539.30	29,010	443.60	31,341	359.80
70	124,678	525.90	110,472	542.70	6,269	446.90	7,722	353.30
71	124,082	525.10	110,620	540.40	6,318	443.40	6,927	359.10
72	120,672	525.10	108,356	539.00	5,836	445.50	6,218	363.60
73	113,810	524.70	102,663	538.20	5,409	438.60	5,499	361.80
74	114,546	523.90	104,102	535.80	5,178	442.90	4,975	363.80
75–79	497,837	525.60	459,400	535.20	19,544	439.50	17,290	377.80
75	111,243	526.40	102,080	537.20	4,554	440.30	4,287	366.20
76	108,672	526.10	100,047	536.30	4,270	443.40	4,022	369.30
77	99,106	525.90	91,528	535.50	3,847	436.90	3,419	379.70
78	92,568	524.90	85,724	533.80	3,577	433.70	2,953	386.70
79	86,248	524.30	80,021	532.10	3,296	442.80	2,609	397.10
80–84	302,256	522.50	282,289	529.30	10,496	437.60	8,228	402.00
85–89	112,717	546.80	106,072	552.60	3,522	452.60	2,614	430.80
90–94	20,706	589.30	19,346	597.20	753	454.80	508	469.70
95 or older	1,876	573.00	1,701	587.10	119	421.00	47	433.00
<i>Husbands</i>								
Subtotal	46,977	288.90	27,290	297.00	5,754	331.90	13,685	255.40
Under 62	1,793	170.90	1,186	174.60	219	177.40	375	156.10
62–64	2,387	244.70	1,545	249.40	348	253.00	479	225.60
65–69	10,756	307.20	6,587	307.60	1,374	367.00	2,757	277.30
70–74	12,492	302.00	6,869	312.00	1,476	361.80	4,115	264.80
75–79	10,282	287.20	5,622	304.30	1,258	325.20	3,349	245.00
80–84	5,994	282.50	3,484	295.10	694	305.50	1,768	249.40
85–89	2,338	288.50	1,383	299.50	283	326.10	634	247.50
90 or older	935	302.70	614	312.80	102	305.40	208	273.50

(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 2006—Continued**

Basis of entitlement and age	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	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	2,478,599	517.60	2,215,657	533.00	116,900	431.30	139,969	348.00
<i>Wives</i>								
Subtotal	2,436,525	521.40	2,191,476	535.50	111,946	434.90	127,249	356.80
By basis of entitlement								
Care of children	44,597	440.20	34,458	465.40	5,530	393.80	4,539	307.90
Under 35	1,396	372.40	1,074	391.20	174	338.80	144	273.50
35–39	2,659	377.50	1,998	400.00	354	329.10	302	287.80
40–44	5,642	392.80	4,190	417.00	794	359.20	657	279.10
45–49	8,607	423.30	6,486	446.60	1,184	395.50	920	297.80
50–54	9,271	444.40	7,100	470.60	1,180	402.00	976	307.60
55–59	7,831	459.90	6,087	485.00	908	421.70	827	319.40
60–61	3,510	482.00	2,799	503.60	391	416.30	312	371.60
62–64	5,681	499.10	4,724	522.70	545	419.60	401	332.90
Age	2,391,928	522.90	2,157,018	536.60	106,416	437.10	122,710	358.60
62–64	234,432	479.70	204,285	498.90	11,375	396.90	18,409	319.00
62	51,330	474.30	44,472	492.70	2,572	398.70	4,150	324.80
63	82,206	474.40	71,734	493.70	3,887	392.50	6,475	312.00
64	100,896	486.70	88,079	506.20	4,916	399.50	7,784	321.80
65–69	630,502	526.90	552,593	546.20	32,289	440.20	44,857	353.30
65	121,681	508.70	106,193	528.10	6,316	416.10	9,007	346.00
66	128,564	525.20	112,080	545.50	6,637	436.40	9,717	353.40
67	127,046	529.90	111,088	550.00	6,516	442.30	9,299	353.70
68	127,214	535.50	112,049	554.00	6,459	451.60	8,564	359.40
69	125,997	534.30	111,183	552.50	6,361	454.50	8,270	354.40
70–74	593,077	526.20	532,475	540.50	28,494	445.10	30,908	359.80
70	123,193	527.90	109,297	544.70	6,119	449.40	7,568	352.70
71	122,853	526.70	109,649	542.00	6,181	444.70	6,817	359.80
72	119,827	526.20	107,691	540.10	5,737	447.00	6,142	363.30
73	113,182	525.50	102,168	539.00	5,329	439.80	5,448	361.60
74	114,022	524.60	103,670	536.50	5,128	443.90	4,933	364.30
75–79	496,656	526.00	458,485	535.50	19,401	439.90	17,172	377.60
75	110,853	526.80	101,783	537.70	4,494	440.40	4,257	366.00
76	108,370	526.60	99,810	536.80	4,237	444.10	3,991	368.70
77	98,896	526.30	91,364	535.80	3,827	437.10	3,393	379.60
78	92,427	525.20	85,614	534.10	3,566	434.00	2,934	386.80
79	86,110	524.50	79,914	532.30	3,277	443.20	2,597	397.40
80–84	301,996	522.60	282,083	529.40	10,471	437.50	8,199	402.00
85–89	112,688	546.90	106,052	552.60	3,517	452.80	2,610	430.90
90–94	20,701	589.40	19,344	597.20	750	456.10	508	469.70
95 or older	1,876	573.00	1,701	587.10	119	421.00	47	433.00
By marital status								
Nondivorced wives	2,303,955	521.90	2,078,878	536.00	98,371	433.60	121,388	354.40
Divorced wives	132,570	512.80	112,598	526.60	13,575	444.70	5,861	407.80
<i>Husbands</i>								
Subtotal	42,074	298.30	24,181	308.70	4,954	348.50	12,720	259.70

(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 2006—Continued**

Basis of entitlement and age	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Spouses of disabled workers</i>								
Total	153,470	257.80	115,255	270.80	16,954	233.40	20,519	206.40
<i>Wives</i>								
Subtotal	148,567	259.40	112,146	272.60	16,154	233.70	19,554	206.80
By basis of entitlement								
Care of children	81,122	204.70	55,430	217.00	10,802	190.80	14,377	169.30
Under 35	14,629	141.30	9,989	148.30	1,909	126.00	2,626	127.30
35–39	15,699	165.30	10,675	174.90	1,932	150.20	3,004	141.10
40–44	18,591	199.90	12,680	211.40	2,392	185.00	3,394	168.90
45–49	15,969	230.90	10,739	245.90	2,209	210.60	2,925	192.10
50–54	9,495	261.70	6,459	277.30	1,385	249.60	1,588	211.00
55–59	4,787	296.30	3,437	311.00	670	278.00	652	238.10
60–61	1,102	326.00	821	342.40	166	292.10	109	261.70
62–64	850	329.00	630	342.90	139	300.10	79	273.10
Age	67,445	325.20	56,716	327.00	5,352	320.30	5,177	310.90
62–64	39,839	310.40	34,337	313.80	2,581	288.90	2,825	288.80
62	13,592	309.40	11,728	313.20	843	288.20	990	284.00
63	14,895	306.80	12,887	309.60	981	285.90	993	291.80
64	11,352	316.30	9,722	320.10	757	293.40	842	290.80
65–69	21,420	341.00	17,498	342.30	2,079	342.80	1,768	327.40
65	7,874	336.30	6,563	339.80	701	331.80	584	304.70
66	5,225	336.30	4,275	336.50	502	335.30	425	332.90
67	3,670	347.50	2,965	348.90	372	348.30	316	337.70
68	2,646	343.80	2,112	345.30	285	354.70	242	317.30
69	2,005	356.30	1,583	351.60	219	370.00	201	378.20
70–74	4,711	363.10	3,738	364.30	516	360.20	433	358.40
70	1,485	363.10	1,175	362.50	150	345.90	154	383.00
71	1,229	356.60	971	358.30	137	386.10	110	315.50
72	845	370.10	665	370.90	99	355.90	76	386.20
73	628	371.90	495	372.50	80	357.30	51	381.50
74	524	356.20	432	362.60	50	345.10	42	302.50
75 or older	1,475	375.30	1,143	369.20	176	397.80	151	394.30
By marital status								
Nondivorced wives	141,536	257.40	106,557	271.40	15,312	228.60	18,973	204.20
Divorced wives	7,031	299.90	5,589	296.90	842	325.90	581	289.80
<i>Husbands</i>								
Subtotal	4,903	208.40	3,109	206.10	800	228.70	965	198.60

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: 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.

- a. Includes 6,815 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.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Diane Wallace (410) 965-0165.

## 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 2006**

Age	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<b>All children</b>								
Total	4,040,530	502.80	2,554,160	534.70	815,079	430.00	651,583	470.70
Under age 18	3,133,398	464.40	1,896,195	491.80	653,384	400.40	567,564	447.70
Under 1	11,093	317.30	6,547	321.10	2,240	270.60	2,220	356.30
1	26,132	336.30	15,162	346.30	5,564	289.70	5,233	360.80
2	37,893	355.10	22,028	369.70	7,799	299.50	7,824	373.60
3	51,368	372.80	29,890	390.50	10,575	314.30	10,609	384.50
4	65,133	381.60	38,008	400.80	13,473	321.60	13,333	391.60
5	82,413	389.90	48,219	410.80	17,126	327.30	16,672	397.60
6	99,910	398.30	58,813	418.10	20,860	339.00	19,798	405.60
7	117,085	408.90	69,511	429.40	23,961	347.10	23,119	414.60
8	137,664	414.10	82,276	436.80	28,552	353.70	26,312	412.00
9	156,465	424.60	93,812	448.40	32,214	362.30	29,856	419.60
10	178,324	433.20	108,328	457.30	36,486	375.20	32,820	421.00
11	202,758	442.80	123,209	467.30	41,384	383.00	37,399	430.30
12	234,427	452.30	141,657	477.60	49,191	393.50	42,533	438.00
13	268,834	461.40	162,007	488.40	57,619	401.90	47,894	442.80
14	306,899	474.70	186,150	503.00	65,035	412.20	54,016	453.10
15	348,708	489.70	212,647	518.90	73,423	424.90	60,548	466.30
16	389,062	522.40	239,028	554.60	80,890	449.10	66,757	495.80
17	419,230	537.40	258,903	569.80	86,992	462.90	70,621	509.90
Disabled adult children	776,596	642.40	575,346	662.80	133,567	557.30	65,101	638.30
18–19	13,130	522.50	8,163	540.20	2,792	460.40	2,072	540.10
20–24	66,041	544.60	39,447	559.20	14,944	487.20	11,202	570.80
25–29	65,483	589.80	41,159	607.10	14,999	538.10	8,884	596.10
30–34	69,143	620.60	46,509	637.20	14,532	568.90	7,703	617.40
35–39	85,162	649.60	61,230	666.00	15,925	585.20	7,719	654.10
40–44	107,121	664.40	79,101	683.60	19,500	584.30	8,253	670.80
45–49	107,277	677.40	81,490	698.10	18,485	581.70	7,059	690.00
50–54	86,403	686.60	67,830	707.00	13,148	578.40	5,266	694.90
55–59	63,110	687.90	51,954	704.10	7,848	566.70	3,201	719.60
60–64	44,066	677.80	37,308	692.80	4,772	541.50	1,906	725.10
65–69	28,670	658.40	24,693	670.50	2,893	544.70	1,052	688.50
70–74	18,833	609.90	16,532	619.60	1,837	517.70	453	628.60
75–79	12,409	575.80	11,083	584.00	1,108	491.30	215	591.80
80 or older	9,748	538.80	8,847	547.00	784	455.30	116	478.20
Students, aged 18–19	130,536	595.70	82,619	626.60	28,128	511.10	18,918	585.30
18	121,787	596.70	77,902	627.40	25,535	510.30	17,542	584.50
19	8,749	582.80	4,717	613.70	2,593	519.40	1,376	595.70
<b>Children of retired workers</b>								
Subtotal	489,940	518.10	353,641	549.90	97,989	460.90	37,563	369.90
Under age 18	282,281	489.90	184,677	526.20	69,271	451.20	27,967	348.20
Under 1	533	444.70	331	473.90	151	439.10	51	272.00
1	1,311	451.40	809	477.20	321	462.90	180	315.30
2	1,913	445.80	1,249	468.70	439	436.50	224	337.70
3	2,839	450.60	1,827	478.10	687	439.80	322	319.50
4	3,731	446.30	2,397	470.20	915	433.30	414	338.50
5	5,027	446.80	3,202	470.00	1,284	440.70	533	323.70
6	6,275	452.70	4,088	478.30	1,554	438.70	626	323.60
7	7,790	451.10	5,044	479.20	1,971	428.40	765	325.30
8	9,498	445.10	6,081	472.80	2,481	424.20	921	320.40
9	11,622	450.80	7,544	479.40	2,918	429.70	1,143	316.00
10	14,031	458.10	9,022	490.20	3,624	431.50	1,367	318.50
11	16,869	459.70	10,840	491.40	4,331	436.90	1,675	314.90
12	20,685	462.60	13,242	495.70	5,398	436.60	2,019	317.30
13	24,658	468.70	15,697	501.90	6,515	442.00	2,415	327.20
14	29,746	477.80	19,425	514.00	7,349	438.80	2,928	336.90
15	35,352	488.60	23,226	524.50	8,550	449.30	3,527	349.10
16	42,158	533.10	27,935	576.20	10,011	475.10	4,152	385.00
17	48,243	545.90	32,718	587.50	10,772	486.40	4,705	395.10

(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 2006—Continued

Age	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	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	192,122	554.40	157,944	572.80	25,291	480.90	8,525	435.50
18–19	2,028	510.70	1,454	537.60	437	452.80	133	412.70
20–24	11,234	524.20	8,094	552.30	2,324	470.50	796	400.30
25–29	14,959	539.50	11,169	563.30	2,656	481.80	1,105	440.50
30–34	21,174	550.90	16,803	571.10	2,916	489.80	1,418	442.90
35–39	32,128	571.90	26,733	591.00	3,707	489.80	1,640	451.90
40–44	42,010	571.20	35,184	588.50	5,200	495.40	1,572	438.80
45–49	35,702	558.90	30,189	575.40	4,407	478.80	1,036	427.90
50–54	19,928	539.20	17,087	553.00	2,273	463.90	519	421.50
55–59	8,868	527.80	7,755	538.70	887	452.50	200	435.40
60–64	2,981	518.20	2,565	531.70	322	429.00	72	411.70
65–69	817	508.70	667	529.00	119	411.60	29	453.10
70 or older	293	480.30	244	494.10	43	430.10	5	300.20
Students, aged 18–19	15,537	580.00	11,020	618.60	3,427	508.20	1,071	415.80
18	14,596	583.40	10,474	621.60	3,103	510.00	1,001	414.00
19	941	527.40	546	560.60	324	491.00	70	442.00
<i>Children of deceased workers</i>								
Subtotal	1,898,862	683.70	1,138,849	740.40	377,157	571.30	373,322	624.70
Under age 18	1,320,862	671.10	731,621	741.10	270,686	555.00	311,301	608.00
Under 1	2,184	593.50	914	667.40	388	456.80	869	576.00
1	6,839	600.70	3,231	669.50	1,391	488.50	2,197	570.20
2	11,874	598.70	5,824	670.80	2,287	485.70	3,717	556.60
3	17,467	613.40	8,786	690.00	3,306	495.00	5,316	560.90
4	23,457	618.80	11,918	696.20	4,543	503.70	6,938	561.70
5	30,722	624.90	15,970	700.30	5,921	504.60	8,764	569.50
6	38,241	630.60	19,980	703.40	7,569	519.00	10,617	573.70
7	46,014	638.40	24,458	709.50	9,011	521.20	12,457	584.10
8	54,956	640.50	29,724	712.70	10,942	523.20	14,180	580.90
9	63,301	648.50	34,441	720.60	12,511	528.90	16,219	588.20
10	72,912	651.90	40,542	722.50	14,568	533.90	17,605	587.80
11	85,231	655.00	47,476	724.00	17,061	536.00	20,468	594.60
12	99,581	661.70	55,192	731.00	20,525	546.10	23,476	600.70
13	116,272	663.40	64,575	732.70	24,559	549.70	26,535	601.30
14	134,369	672.20	74,946	743.50	28,350	555.20	30,193	606.40
15	154,177	682.70	86,837	750.40	32,392	568.10	33,781	619.80
16	174,128	704.20	98,736	771.50	36,171	586.10	37,791	642.60
17	189,137	714.30	108,071	779.00	39,191	597.40	40,178	655.40
Disabled adult children	512,596	708.00	369,054	731.80	92,237	610.60	49,615	711.00
18–19	5,844	686.40	3,198	740.10	1,250	590.70	1,350	648.10
20–24	30,385	685.00	15,313	732.20	7,134	603.40	7,705	666.60
25–29	32,293	712.70	17,901	752.50	8,222	638.60	5,899	694.80
30–34	35,391	727.50	20,976	764.60	8,892	650.10	5,250	709.00
35–39	45,146	736.60	28,921	770.10	10,492	645.20	5,527	737.30
40–44	62,008	736.70	41,749	773.30	13,563	626.40	6,501	733.00
45–49	71,204	737.90	51,084	771.50	13,948	615.30	5,999	736.40
50–54	66,454	730.90	50,731	759.00	10,866	602.60	4,747	724.80
55–59	54,236	714.10	44,194	733.10	6,960	581.30	3,001	738.50
60–64	41,085	689.40	34,743	704.70	4,450	549.70	1,834	737.40
65–69	27,853	662.80	24,026	674.40	2,774	550.40	1,023	695.20
70–74	18,631	611.40	16,365	621.00	1,808	518.90	448	632.30
75–79	12,350	576.30	11,034	584.40	1,098	492.60	215	591.80
80 or older	9,716	538.80	8,819	547.00	780	455.00	116	478.20
Students, aged 18–19	65,404	747.50	38,174	809.00	14,234	625.70	12,406	698.40
18	60,593	750.80	35,810	811.60	12,814	626.20	11,422	700.20
19	4,811	706.50	2,364	769.80	1,420	621.30	984	677.90

(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 2006—Continued**

Age	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<b>Children of disabled workers</b>								
Subtotal	1,651,728	290.40	1,061,670	309.00	339,933	264.20	240,698	247.60
Under age 18	1,530,255	281.20	979,897	299.20	313,427	255.70	228,296	241.20
Under 1	8,376	237.20	5,302	251.80	1,701	213.20	1,300	212.70
1	17,982	227.40	11,122	242.90	3,852	203.50	2,856	202.60
2	24,106	227.90	14,955	244.20	5,073	203.70	3,883	200.60
3	31,062	230.30	19,277	245.60	6,582	210.40	4,971	200.10
4	37,945	228.60	23,693	245.10	8,015	205.70	5,981	198.00
5	46,664	229.00	29,047	245.00	9,921	206.90	7,375	198.60
6	55,394	231.80	34,745	246.90	11,737	209.70	8,555	202.90
7	63,281	236.90	40,009	251.90	12,979	213.80	9,897	208.00
8	73,210	240.10	46,471	255.60	15,129	219.50	11,211	205.70
9	81,542	247.10	51,827	263.10	16,785	226.40	12,494	210.20
10	91,381	254.90	58,764	269.20	18,294	237.70	13,848	219.10
11	100,658	260.20	64,893	275.40	19,992	240.90	15,256	222.50
12	114,161	267.80	73,223	283.40	23,268	248.90	17,038	228.10
13	127,904	276.20	81,735	292.80	26,545	255.30	18,944	235.60
14	142,784	288.10	91,779	304.30	29,336	267.30	20,895	247.90
15	159,179	303.00	102,584	321.60	32,481	275.60	23,240	260.90
16	172,776	336.60	112,357	358.70	34,708	298.80	24,814	290.70
17	181,850	351.10	118,114	373.50	37,029	313.80	25,738	303.70
Disabled adult children	71,878	410.10	48,348	429.60	16,039	371.10	6,961	368.90
18–19	5,258	345.00	3,511	359.20	1,105	316.10	589	321.40
20–24	24,422	379.30	16,040	397.60	5,486	343.00	2,701	347.50
25–29	18,231	413.10	12,089	432.50	4,121	373.80	1,880	378.10
30–34	12,578	437.20	8,730	458.20	2,724	388.30	1,035	391.50
35–39	7,888	468.00	5,576	486.20	1,726	425.30	552	422.10
40 or older	3,501	479.10	2,402	496.00	877	442.20	204	444.90
Students, aged 18–19	49,595	400.50	33,425	420.90	10,467	356.40	5,441	360.90
18	46,598	400.40	31,618	420.60	9,618	356.10	5,119	359.80
19	2,997	401.50	1,807	425.50	849	359.60	322	377.80

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: 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.

- a. Includes 19,708 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 groups is not available.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Diane Wallace (410) 965-0165.



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 2006

Age, sex, and marital status	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All widowed mothers and fathers	171,453	756.60	110,485	813.20	23,013	651.80	37,163	653.90
<i>By age</i>								
Under 25	2,197	565.80	1,286	589.30	177	467.60	732	548.60
25–29	8,987	610.40	5,513	649.60	1,031	483.20	2,431	575.30
25	1,126	590.50	664	623.20	107	463.30	354	566.30
26	1,502	616.00	927	648.80	144	470.10	429	594.80
27	1,761	616.60	1,087	655.10	213	507.30	458	575.40
28	2,158	605.80	1,294	645.20	277	471.90	584	581.20
29	2,440	615.70	1,541	661.20	290	490.10	606	560.80
30–34	18,177	641.40	11,111	689.60	2,489	531.40	4,526	584.50
30	2,746	626.30	1,659	671.90	363	514.20	721	577.60
31	3,135	634.00	1,928	681.20	411	530.10	790	573.30
32	3,556	641.00	2,190	688.50	493	532.50	866	583.20
33	4,038	643.50	2,467	691.60	589	528.30	966	594.40
34	4,702	653.60	2,867	704.70	633	544.30	1,183	588.90
35–39	29,520	690.50	18,528	746.70	4,008	584.60	6,865	602.90
35	5,326	658.50	3,338	715.20	691	547.40	1,272	572.30
36	5,825	674.30	3,607	727.10	816	584.30	1,384	590.10
37	5,983	688.60	3,820	745.50	810	564.50	1,329	603.30
38	5,932	699.60	3,671	751.40	834	612.70	1,393	620.10
39	6,454	725.00	4,092	786.80	857	606.50	1,487	624.50
40–44	36,430	769.40	23,867	829.20	4,475	660.10	7,927	653.30
40	6,556	739.40	4,159	794.40	807	635.20	1,570	649.20
41	7,174	751.40	4,779	812.10	892	635.30	1,469	628.00
42	7,499	772.30	4,907	830.20	913	669.40	1,648	656.90
43	7,567	784.50	4,960	847.30	913	670.00	1,665	661.10
44	7,634	794.30	5,062	855.20	950	686.20	1,575	669.00
45–49	34,595	820.30	22,745	879.60	4,410	709.30	7,256	703.10
45	7,571	803.20	5,019	862.00	910	684.50	1,615	687.90
46	7,485	818.50	4,928	878.40	982	706.80	1,546	700.70
47	6,917	819.40	4,558	873.20	857	721.40	1,457	710.20
48	6,540	833.70	4,262	894.90	841	719.70	1,395	715.70
49	6,082	830.60	3,978	894.20	820	716.80	1,243	703.40
50–54	21,184	837.10	13,571	898.50	2,984	727.70	4,485	724.00
50	5,629	839.40	3,593	899.50	747	730.20	1,259	731.50
51	4,804	833.40	3,101	896.20	652	732.90	1,025	707.60
52	4,146	835.20	2,668	896.30	601	720.40	842	724.70
53	3,543	830.90	2,243	892.50	548	729.70	722	717.90
54	3,062	848.70	1,966	910.10	436	723.50	637	741.50
55–59	10,940	837.80	7,178	885.20	1,751	738.00	1,940	753.60
55	2,669	846.10	1,731	892.40	388	743.20	535	769.40
56	2,368	844.80	1,507	898.60	384	753.60	457	745.70
57	2,072	831.10	1,347	882.10	353	718.00	359	746.40
58	1,923	824.00	1,291	874.40	307	712.10	314	733.00
59	1,908	838.70	1,302	874.40	319	760.00	275	768.70
60–61	3,473	809.00	2,368	851.30	614	710.80	476	725.40
60	1,803	811.30	1,241	851.90	290	713.10	264	727.90
61	1,670	806.50	1,127	850.70	324	708.70	212	722.30
62 or older	5,950	812.00	4,318	845.90	1,074	717.90	525	729.90

(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 2006—Continued**

Age, sex, and marital status	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<b>By sex and marital status</b>								
Women	160,770	763.20	103,842	821.40	21,373	652.50	34,797	658.40
Mothers	146,380	763.70	93,779	824.50	20,017	652.00	31,888	656.20
Surviving divorced mothers	14,390	757.70	10,063	793.00	1,356	660.60	2,909	682.20
Men	10,683	657.20	6,643	685.50	1,640	642.50	2,366	588.30

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: 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.

- a. Includes 792 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.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Diane Wallace (410) 965-0165.

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 2006

Age, sex, and marital status	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All nondisabled widow(er)s	4,273,442	1,007.80	3,487,755	1,031.40	337,536	804.50	436,240	976.30
<b>Women</b>								
Subtotal	4,225,561	1,009.80	3,463,191	1,032.80	332,124	804.70	418,471	982.20
<i>By age</i>								
60–61	112,335	993.10	31,963	1,061.40	4,680	841.90	75,598	973.80
60	47,658	1,002.90	13,030	1,069.10	1,832	863.00	32,750	984.50
61	64,677	986.00	18,933	1,056.10	2,848	828.40	42,848	965.70
62–64	304,057	1,019.40	131,076	1,062.30	17,029	859.10	155,655	1,001.00
62	86,149	1,009.40	27,834	1,069.90	3,904	854.40	54,317	989.80
63	105,017	1,025.10	38,112	1,079.50	4,899	870.10	61,904	1,004.10
64	112,891	1,021.60	65,130	1,049.00	8,226	854.70	39,434	1,011.60
65–69	596,316	1,032.90	444,922	1,047.00	56,039	836.60	94,235	1,084.50
65	126,635	1,001.80	82,429	1,011.30	11,165	799.60	32,812	1,047.20
66	119,045	1,063.50	85,661	1,067.70	10,954	857.10	22,220	1,150.60
67	117,138	1,053.30	87,958	1,061.50	11,048	853.20	17,924	1,139.20
68	117,750	1,032.50	92,107	1,047.00	11,240	838.70	14,174	1,094.00
69	115,748	1,015.10	96,767	1,046.10	11,632	835.10	7,105	893.80
70–74	604,146	998.30	513,052	1,028.90	61,647	815.60	27,637	845.70
70	111,082	1,001.50	93,318	1,032.80	11,585	827.00	5,863	856.20
71	116,801	995.70	98,675	1,027.60	12,083	808.80	5,717	846.90
72	122,955	1,000.50	104,482	1,030.10	12,712	822.70	5,422	849.50
73	121,408	997.50	103,506	1,027.80	12,224	811.90	5,277	840.70
74	131,900	996.80	113,071	1,026.50	13,043	808.20	5,358	834.10
75–79	767,613	1,001.50	673,796	1,027.30	66,625	802.20	24,685	841.90
75	137,919	1,002.20	120,038	1,029.40	12,527	807.00	4,908	840.70
76	151,271	1,005.00	131,894	1,032.70	13,553	804.80	5,302	835.60
77	152,982	1,004.20	134,325	1,030.50	13,294	802.90	4,873	840.10
78	159,038	999.90	140,405	1,024.60	13,330	801.00	4,809	838.10
79	166,403	996.80	147,134	1,020.60	13,921	796.00	4,793	856.00
80–84	819,838	996.80	734,890	1,018.40	61,294	786.30	20,924	854.50
80	166,130	993.90	147,605	1,016.60	13,355	795.90	4,625	846.30
81	164,920	995.30	147,142	1,018.00	12,870	787.40	4,395	848.30
82	168,655	992.80	151,307	1,014.10	12,507	782.30	4,275	852.30
83	162,349	998.00	146,358	1,018.90	11,506	777.80	3,909	861.00
84	157,784	1,004.30	142,478	1,024.60	11,056	786.70	3,720	867.70
85–89	617,256	1,031.80	563,226	1,051.50	39,186	787.00	12,652	894.60
85	156,616	1,015.60	142,508	1,034.60	10,238	790.10	3,311	881.80
86	142,613	1,026.90	129,935	1,046.70	9,125	786.40	3,036	883.50
87	118,061	1,033.00	107,257	1,054.00	7,931	788.60	2,450	900.60
88	107,549	1,045.40	98,645	1,065.00	6,417	783.60	2,119	903.20
89	92,417	1,049.50	84,881	1,068.60	5,475	783.30	1,736	919.80
90–94	298,192	1,018.00	273,896	1,037.00	18,048	759.30	5,382	868.40
95 or older	105,808	945.30	96,370	966.20	7,576	706.80	1,703	806.00
<i>By marital status</i>								
Widows	3,887,171	1,007.70	3,225,444	1,031.80	299,300	798.00	351,470	965.40
Surviving divorced wives (nondisabled)	338,390	1,034.20	237,747	1,047.30	32,824	865.90	67,001	1,070.60

(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 2006—Continued**

Age, sex, and marital status	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<b>Men</b>								
Subtotal	47,881	829.10	24,564	832.40	5,412	791.50	17,769	837.10
60–61	8,376	765.50	2,902	775.30	398	767.70	5,071	759.60
62–64	15,441	911.60	6,552	930.70	1,115	900.40	7,757	896.80
65–69	10,723	944.70	6,112	951.80	1,485	879.20	3,096	962.30
70–74	3,930	757.40	2,502	781.20	801	770.50	605	649.00
75–79	3,414	692.20	2,246	717.90	670	703.30	482	558.10
80–84	2,763	640.00	1,919	659.60	456	621.10	371	564.90
85–89	1,735	613.00	1,179	630.70	289	615.20	250	537.70
90 or older	1,499	607.60	1,152	612.50	198	600.80	137	585.50

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: 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.

- a. Includes 11,911 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.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Diane Wallace (410) 965-0165.

**Table 5.A1.7—Number and average monthly benefit for disabled widow(er)s, by age, sex, marital status, and race, December 2006**

Age, sex, and marital status	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All disabled widow(er)s	220,178	630.70	117,928	640.50	32,802	550.20	68,476	653.40
<i>By age</i>								
50–54	28,571	630.20	9,582	614.40	3,477	536.00	15,363	662.30
50	2,607	614.20	741	583.70	293	518.70	1,559	647.20
51	4,125	615.00	1,232	590.90	483	524.00	2,388	647.40
52	5,875	633.10	1,910	605.50	657	526.60	3,275	671.60
53	7,130	630.30	2,258	613.70	841	524.30	3,994	662.90
54	8,834	639.90	3,441	634.90	1,203	558.30	4,147	668.50
55–59	79,169	634.60	36,983	639.10	11,073	553.10	30,749	659.40
55	10,681	636.30	4,619	637.40	1,463	558.40	4,549	660.90
56	12,628	630.70	5,556	646.10	1,878	548.40	5,130	645.50
57	15,376	635.30	7,114	638.80	2,245	560.60	5,935	660.60
58	18,364	638.00	8,703	639.20	2,574	557.00	7,022	667.10
59	22,120	632.50	10,991	636.40	2,913	544.10	8,113	659.70
60–65	112,438	628.10	71,363	644.70	18,252	551.10	22,364	639.20
60	22,603	633.60	11,894	640.30	2,977	553.70	7,635	655.30
61	20,565	626.10	11,712	642.70	3,150	545.80	5,630	637.90
62	21,430	628.90	13,449	644.20	3,507	553.30	4,386	643.50
63	21,629	628.90	14,930	648.30	3,669	550.80	2,941	629.50
64	20,348	624.10	15,018	646.90	3,823	552.30	1,411	578.10
65	5,863	621.10	4,360	643.10	1,126	549.60	361	584.10
<i>By sex and marital status</i>								
Women	212,063	637.40	114,437	647.00	31,365	554.00	65,342	661.70
Widows	181,965	636.30	97,236	647.00	27,281	551.10	56,747	659.80
Surviving divorced wives	30,098	643.80	17,201	646.70	4,084	572.90	8,595	674.20
Men	8,115	455.00	3,491	426.60	1,437	467.70	3,134	481.70

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: 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.

- a. Includes 972 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.  
c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Diane Wallace (410) 965-0165.

## 5.A OASDI Current-Pay Benefits: Summary

**Table 5.A1.8—Number and average monthly benefit for parents, by age, sex, and race, December 2006**

Age and sex	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number <sup>c</sup>	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
All parents	1,889	892.20	971	918.30	197	858.20	693	865.80
<b>By age</b>								
62–69	154	952.70	51	1,001.30	20	996.10	83	912.50
70–74	236	874.00	75	910.90	33	894.90	123	844.10
75–79	344	918.90	160	982.60	39	827.10	137	875.40
80–84	415	897.60	215	933.90	30	910.20	164	846.20
85–89	366	915.80	212	927.40	40	894.10	111	901.80
90 or older	374	825.00	258	843.70	35	693.60	75	821.70
<b>By sex</b>								
Women	1,677	899.60	909	925.80	185	855.40	559	872.20
Men	212	833.70	62	808.90	12	900.60	134	838.90

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.

- a. Includes 28 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.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Diane Wallace (410) 965-0165.

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 2006**

Age and type of benefit	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Retired workers</i>								
Total	22,597,344	978.20	20,042,666	994.90	1,751,137	873.20	768,809	786.80
62–64	2,838,893	937.70	2,445,575	956.00	248,220	872.50	144,192	740.40
62	710,952	911.70	604,421	930.30	63,167	860.20	42,869	726.50
63	1,016,393	927.80	877,497	945.20	89,686	862.70	49,010	736.60
64	1,111,548	963.30	963,657	981.90	95,367	889.90	52,313	755.40
65–69	6,084,092	1,035.30	5,276,006	1,056.30	519,576	946.00	287,264	813.00
65	1,229,725	1,018.60	1,059,209	1,040.10	106,178	939.30	63,923	794.70
66	1,307,547	1,056.40	1,127,123	1,079.10	113,243	969.00	66,926	824.80
67	1,234,136	1,043.00	1,068,600	1,064.30	106,256	951.80	59,034	823.00
68	1,208,407	1,036.50	1,054,447	1,056.60	100,910	942.50	52,884	816.20
69	1,104,277	1,018.90	966,627	1,038.10	92,989	922.80	44,497	804.50
70–74	4,593,789	955.00	4,059,816	972.10	377,891	850.90	153,549	764.10
70	1,031,502	978.50	906,667	996.80	84,652	881.50	39,886	770.20
71	971,341	952.90	856,046	970.20	81,451	848.90	33,542	764.80
72	901,493	939.70	797,254	956.30	74,556	837.20	29,159	750.90
73	840,046	941.50	744,318	958.10	68,646	835.60	26,461	754.80
74	849,407	958.60	755,531	974.80	68,586	845.80	24,501	779.10
75–79	3,824,675	951.30	3,455,341	966.00	268,016	828.70	91,232	769.80
75	816,289	945.90	734,035	960.90	58,901	834.10	22,187	757.10
76	808,689	944.60	729,026	959.40	57,522	827.10	20,865	761.30
77	753,940	943.50	680,941	958.10	52,986	821.60	17,684	767.20
78	735,689	959.10	666,464	973.60	50,532	830.00	15,956	784.50
79	710,068	965.50	644,875	980.10	48,075	830.60	14,540	788.40
80–84	2,858,549	958.20	2,610,767	971.40	183,058	819.50	53,947	804.60
80	654,741	955.40	595,876	969.30	43,471	819.80	12,836	788.80
81	627,056	972.80	571,640	986.70	40,792	833.40	12,210	811.50
82	581,107	956.70	531,385	969.70	36,983	818.40	10,619	806.70
83	522,298	950.10	478,384	962.70	32,376	810.40	9,651	808.30
84	473,347	953.20	433,482	966.00	29,436	811.10	8,631	811.50
85–89	1,616,066	981.20	1,485,906	994.10	97,276	820.30	26,258	853.10
85	438,917	955.40	403,872	967.60	26,178	808.50	7,166	818.20
86	372,827	957.60	342,756	970.10	22,397	803.00	6,163	828.90
87	304,690	974.00	278,865	987.60	19,431	810.50	5,091	856.10
88	274,306	1,015.50	252,937	1,028.20	15,934	847.20	4,273	891.40
89	225,326	1,038.30	207,476	1,052.40	13,336	854.70	3,565	914.50
90–94	621,330	1,034.60	567,394	1,049.60	41,894	858.60	9,814	923.40
95 or older	159,950	945.30	141,861	967.50	15,206	756.00	2,553	842.30
<i>Men</i>								
Subtotal	11,196,443	1,094.10	9,944,289	1,117.20	827,903	944.10	410,715	846.40
62–64	1,423,561	1,108.00	1,222,741	1,142.00	125,824	947.40	74,547	822.00
62	350,056	1,083.10	297,389	1,117.90	31,667	934.10	20,760	813.20
63	510,446	1,095.40	438,953	1,128.50	45,371	936.40	26,031	815.90
64	563,059	1,134.80	486,399	1,169.00	48,786	966.20	27,756	834.20
65–69	3,185,834	1,200.30	2,758,948	1,235.20	264,607	1,030.50	161,819	883.60
65	630,191	1,191.80	541,247	1,229.90	53,944	1,020.40	34,854	867.40
66	683,466	1,228.50	587,757	1,267.20	57,547	1,054.70	38,049	895.30
67	649,348	1,208.60	561,502	1,243.90	54,125	1,038.90	33,632	893.80
68	638,652	1,197.20	557,062	1,229.60	51,429	1,028.10	30,109	888.10
69	584,177	1,170.60	511,380	1,200.80	47,562	1,005.80	25,175	869.40
70–74	2,414,235	1,075.70	2,140,166	1,099.90	188,169	917.80	84,499	818.60
70	543,352	1,115.30	477,899	1,143.10	42,805	956.80	22,531	828.10
71	509,994	1,078.20	450,575	1,103.20	40,753	918.20	18,515	821.90
72	474,659	1,055.50	421,042	1,079.20	37,151	900.80	16,157	799.80
73	441,006	1,051.70	392,579	1,074.30	33,825	896.30	14,231	806.80
74	445,224	1,069.70	398,071	1,091.40	33,635	907.90	13,065	833.50

(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 2006—Continued**

Age and type of benefit	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	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	1,961,619	1,041.30	1,785,103	1,058.70	125,406	884.50	46,443	811.80
75	426,991	1,044.40	386,491	1,063.40	28,275	889.70	11,570	804.30
76	421,653	1,037.70	382,491	1,055.80	27,637	884.00	10,814	804.10
77	388,366	1,029.00	353,583	1,045.90	24,762	877.10	8,971	805.60
78	373,005	1,047.10	340,511	1,063.90	23,364	886.00	7,941	827.10
79	351,604	1,049.00	322,027	1,065.40	21,368	884.90	7,147	826.50
80-84	1,328,965	1,008.20	1,222,400	1,021.80	76,279	860.20	26,357	826.60
80	316,716	1,024.00	290,581	1,039.10	18,880	866.30	6,289	823.70
81	296,529	1,041.00	272,366	1,055.60	17,437	886.00	5,834	845.10
82	267,951	1,006.10	246,688	1,019.40	15,308	860.10	5,180	828.20
83	237,461	981.30	218,765	993.80	13,225	840.80	4,807	821.10
84	210,308	970.80	194,000	982.80	11,429	833.50	4,247	809.70
85-89	652,946	968.30	605,149	978.80	33,808	832.80	11,935	837.80
85	189,722	954.30	175,911	965.00	9,735	818.50	3,521	811.40
86	155,544	931.90	144,198	941.90	8,074	805.20	2,784	801.10
87	121,564	947.90	112,162	958.50	6,722	814.90	2,292	831.50
88	104,458	1,008.30	97,048	1,018.60	5,211	869.50	1,862	878.20
89	81,658	1,049.70	75,830	1,060.10	4,066	904.20	1,476	929.00
90-94	194,088	1,055.40	178,629	1,066.20	10,919	924.70	4,004	940.80
95 or older	35,195	925.40	31,153	941.40	2,891	786.70	1,111	842.40
<i>Women</i>								
Subtotal	11,400,901	864.40	10,098,377	874.60	923,234	809.50	358,094	718.40
62-64	1,415,332	766.40	1,222,834	770.00	122,396	795.50	69,645	653.10
62	360,896	745.50	307,032	748.60	31,500	785.80	22,109	645.20
63	505,947	758.80	438,544	761.80	44,315	787.20	22,979	646.80
64	548,489	787.30	477,258	791.30	46,581	810.00	24,557	666.20
65-69	2,898,258	853.90	2,517,058	860.10	254,969	858.30	125,445	721.90
65	599,534	836.60	517,962	841.90	52,234	855.60	29,069	707.60
66	624,081	868.00	539,366	874.10	55,696	880.40	28,877	731.90
67	584,788	859.20	507,098	865.50	52,131	861.40	25,402	729.30
68	569,755	856.30	497,385	862.90	49,481	853.50	22,775	721.10
69	520,100	848.50	455,247	855.30	45,427	835.90	19,322	719.90
70-74	2,179,554	821.30	1,919,650	829.50	189,722	784.60	69,050	697.50
70	488,150	826.20	428,768	833.60	41,847	804.50	17,355	694.90
71	461,347	814.40	405,471	822.40	40,698	779.50	15,027	694.50
72	426,834	810.90	376,212	818.80	37,405	773.90	13,002	690.20
73	399,040	819.60	351,739	828.30	34,821	776.70	12,230	694.30
74	404,183	836.20	357,460	845.00	34,951	786.20	11,436	717.00
75-79	1,863,056	856.60	1,670,238	867.00	142,610	779.70	44,789	726.20
75	389,298	837.80	347,544	846.90	30,626	782.70	10,617	705.60
76	387,036	843.10	346,535	853.00	29,885	774.60	10,051	715.20
77	365,574	852.60	327,358	863.20	28,224	772.90	8,713	727.70
78	362,684	868.60	325,953	879.30	27,168	781.70	8,015	742.30
79	358,464	883.60	322,848	895.00	26,707	787.10	7,393	751.60
80-84	1,529,584	914.70	1,388,367	927.10	106,779	790.40	27,590	783.60
80	338,025	891.20	305,295	903.00	24,591	784.00	6,547	755.40
81	330,527	911.60	299,274	923.90	23,355	794.10	6,376	780.70
82	313,156	914.40	284,697	926.60	21,675	788.90	5,439	786.30
83	284,837	924.10	259,619	936.50	19,151	789.50	4,844	795.60
84	263,039	939.20	239,482	952.30	18,007	797.00	4,384	813.30
85-89	963,120	989.90	880,757	1,004.60	63,468	813.70	14,323	865.70
85	249,195	956.30	227,961	969.50	16,443	802.60	3,645	824.80
86	217,283	976.00	198,558	990.70	14,323	801.80	3,379	851.80
87	183,126	991.30	166,703	1,007.10	12,709	808.20	2,799	876.30
88	169,848	1,020.00	155,889	1,034.10	10,723	836.40	2,411	901.70
89	143,668	1,031.80	131,646	1,047.90	9,270	833.00	2,089	904.30

(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 2006—Continued

Age and type of benefit	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	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	427,242	1,025.10	388,765	1,042.00	30,975	835.30	5,810	911.50
95 or older	124,755	951.00	110,708	974.90	12,315	748.80	1,442	842.30
<i>Disabled workers</i>								
Total	50,229	1,177.20	40,107	1,221.50	7,028	1,078.60	3,071	827.00
62	3,198	1,199.30	2,555	1,245.60	439	1,086.30	202	869.40
63	12,166	1,184.30	9,711	1,228.90	1,677	1,082.90	774	845.70
64	19,531	1,169.30	15,576	1,213.70	2,754	1,075.90	1,193	806.90
65	15,334	1,177.10	12,265	1,220.60	2,158	1,077.30	902	828.00
<i>Men</i>								
Subtotal	30,048	1,360.00	24,512	1,415.80	3,685	1,212.50	1,843	916.60
62	1,909	1,391.20	1,558	1,445.70	230	1,233.50	119	1,002.10
63	7,315	1,358.60	5,953	1,416.10	892	1,208.40	469	917.40
64	11,642	1,354.80	9,504	1,411.00	1,446	1,204.70	691	898.10
65	9,182	1,361.20	7,497	1,415.40	1,117	1,221.60	564	920.50
<i>Women</i>								
Subtotal	20,181	905.10	15,595	916.30	3,343	931.10	1,228	692.50
62	1,289	915.20	997	933.00	209	924.30	83	679.20
63	4,851	921.40	3,758	932.50	785	940.20	305	735.40
64	7,889	895.50	6,072	905.00	1,308	933.40	502	681.40
65	6,152	902.40	4,768	914.30	1,041	922.50	338	673.70
<i>Spouses</i>								
Total	2,058,675	494.70	1,869,756	506.40	89,249	410.70	95,039	347.80
<i>Wives</i>								
Subtotal	2,044,341	496.30	1,860,194	507.60	87,307	413.00	92,273	350.80
<i>By age</i>								
62–64	274,055	455.20	238,447	472.30	13,937	377.00	21,213	315.10
62	64,868	439.90	56,157	455.30	3,411	371.60	5,133	317.10
63	97,035	448.70	84,566	465.60	4,862	371.10	7,463	309.30
64	112,152	469.60	97,724	487.80	5,664	385.40	8,617	318.80
65–69	583,955	511.30	515,844	528.10	29,739	423.20	37,676	352.20
65	126,536	496.50	110,203	515.30	6,772	406.00	9,383	342.30
66	123,264	508.00	107,759	526.30	6,541	420.90	8,840	351.20
67	115,786	513.80	102,303	530.80	5,853	425.90	7,498	353.70
68	112,144	521.00	100,100	536.20	5,515	435.30	6,414	360.10
69	106,225	519.60	95,479	533.70	5,058	433.00	5,541	359.30
70–74	478,914	504.50	438,489	514.70	21,253	421.10	18,152	363.10
70	102,770	513.90	93,077	526.30	4,687	427.60	4,825	362.70
71	100,470	507.70	91,449	518.90	4,695	421.40	4,155	364.50
72	95,037	500.10	87,074	509.80	4,235	419.80	3,506	363.60
73	89,736	499.70	82,626	509.00	3,922	413.70	2,994	361.70
74	90,901	499.60	84,263	507.70	3,714	421.80	2,672	362.70
75–79	393,311	498.60	368,997	505.00	13,544	419.00	9,465	372.70
75	88,446	501.30	82,541	508.40	3,228	426.00	2,405	366.40
76	86,327	500.40	80,872	507.10	2,981	422.60	2,204	370.00
77	78,540	499.00	73,802	505.60	2,651	413.20	1,829	373.00
78	72,945	497.00	68,669	503.10	2,437	411.40	1,585	378.60
79	67,053	493.80	63,113	499.40	2,247	419.10	1,442	380.20
80–84	224,757	484.80	213,099	489.20	6,547	406.30	4,326	390.90
85–89	76,921	498.20	73,469	501.60	1,953	412.30	1,227	421.90
90–94	11,676	504.20	11,163	508.70	291	389.50	192	426.90
95 or older	752	463.50	686	474.00	43	326.70	22	390.00

(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 2006—Continued**

Age and type of benefit	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	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	1,982,878	501.80	1,808,151	513.00	82,659	419.00	87,686	353.50
Wives of disabled workers	61,463	316.90	52,043	319.40	4,648	306.10	4,587	299.50
<i>Husbands</i>								
Subtotal	14,334	272.80	9,562	273.60	1,942	305.10	2,766	248.60
<b>Nondisabled widow(er)s</b>								
Total	2,486,005	935.10	1,899,653	948.60	225,798	763.70	354,812	973.20
60–64	440,209	1,004.10	172,493	1,052.30	23,222	856.00	244,081	984.30
60	51,102	987.30	14,124	1,046.80	1,970	859.10	34,961	970.60
61	69,609	970.00	20,741	1,031.30	3,108	821.50	45,708	952.50
62	91,234	1,002.00	29,720	1,058.60	4,228	855.70	57,187	983.60
63	110,225	1,020.70	40,181	1,073.30	5,226	874.30	64,713	1,000.10
64	118,039	1,017.40	67,727	1,044.60	8,690	856.80	41,512	1,006.90
65–69	519,858	1,004.70	393,035	1,020.40	51,183	822.50	74,778	1,049.00
65	126,666	994.40	82,103	1,004.40	11,292	799.50	33,093	1,037.00
66	106,109	1,032.40	77,827	1,039.70	10,250	843.70	17,875	1,110.70
67	98,196	1,016.00	76,678	1,030.60	9,983	837.10	11,372	1,078.20
68	96,630	998.40	78,185	1,017.40	9,863	820.00	8,405	1,034.20
69	92,257	981.60	78,242	1,011.20	9,795	814.70	4,033	821.70
70–74	411,361	945.10	350,598	973.70	45,563	778.70	13,893	776.80
70	83,976	964.20	71,216	993.40	9,269	800.50	3,238	802.40
71	83,782	950.20	71,216	980.90	9,288	775.00	3,037	773.30
72	83,732	946.00	71,308	973.40	9,422	786.60	2,745	785.00
73	78,547	934.90	67,106	963.20	8,648	767.60	2,521	761.80
74	81,324	929.10	69,752	956.60	8,936	762.10	2,352	752.30
75–79	415,529	914.20	362,109	939.00	42,285	745.10	9,812	738.00
75	81,192	927.00	70,427	952.50	8,356	757.60	2,128	754.50
76	85,524	923.30	74,176	949.60	8,893	751.20	2,162	741.10
77	82,930	918.70	72,309	944.00	8,464	747.40	1,899	729.50
78	82,260	906.30	72,022	930.10	8,130	739.80	1,864	723.90
79	83,623	895.90	73,175	919.10	8,442	729.10	1,759	738.70
80–84	363,543	871.00	321,330	892.00	34,295	705.70	6,841	720.00
85–89	221,979	843.20	198,606	861.80	19,191	677.90	3,583	691.80
90–94	85,660	778.20	76,731	795.70	7,384	621.50	1,412	644.40
95 or older	27,866	760.50	24,751	776.90	2,675	626.60	412	642.30

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.

a. Includes 34,732 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.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A4—Number and total monthly benefits, by trust fund and type of benefit, December 1940–2006, 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

(Continued)

## 5.A OASDI Current-Pay Benefits: Summary

**Table 5.A4—Number and total monthly benefits, by trust fund and type of benefit, December 1940–2006, 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

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

... = not applicable.

CONTACT: Diane Wallace (410) 965-0165.

**Table 5.A5—Number and average age, by type of benefit, December 2006**

Type of benefit	Number <sup>a</sup> (thousands)	Average age
Total, OASDI	49,123	66
OASI	40,511	71
Retired workers	30,976	74
Spouses of retired workers	2,479	73
Children of retired workers	490	24
Under age 18	282	13
Disabled adult children	192	41
Students, aged 18–19	16	18
Children of deceased workers	1,899	22
Under age 18	1,321	12
Disabled adult children	513	48
Students, aged 18–19	65	18
Nondisabled widow(er)s	4,273	77
Widowed mothers and fathers	171	43
Disabled widow(er)s	220	59
Parents of deceased workers	2	82
DI	8,612	45
Disabled workers	6,807	52
Spouses of disabled workers	153	53
Children of disabled workers	1,652	13
Under age 18	1,530	12
Disabled adult children	72	27
Students, aged 18–19	50	18

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

a. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Shirley Turpin (410) 965-0181.

**Table 5.A6—Number and average monthly benefit, by age, sex, type of benefit, and race, December 2006**

Type of benefit	All races <sup>a</sup>	White	Black	Other <sup>b</sup>
<i>Number<sup>c</sup> (thousands)</i>				
Total, OASDI	49,123	40,555	5,046	3,361
<i>By age and sex</i>				
Adults	45,082	38,001	4,231	2,710
Men	19,626	16,654	1,794	1,117
Women	25,456	21,347	2,436	1,592
Children	4,041	2,554	815	652
Under age 18	3,133	1,896	653	568
Disabled adult children	777	575	134	65
Students, aged 18–19	131	83	28	19
Retired workers and their spouses and children	33,945	29,736	2,772	1,372
Retired workers	30,976	27,167	2,557	1,194
Spouses	2,479	2,216	117	140
Children	490	354	98	38
Disabled workers and their spouses and children	8,612	5,963	1,503	1,074
Disabled workers	6,807	4,786	1,146	812
Spouses	153	115	17	21
Children	1,652	1,062	340	241
Survivors of deceased workers	6,566	4,856	771	916
Nondisabled widow(er)s	4,273	3,488	338	436
Disabled widow(er)s	220	118	33	68
Widowed mothers and fathers	171	110	23	37
Children	1,899	1,139	377	373
Parents	2	1	<sup>d</sup>	1
Retired workers	1,044.40	1,065.20	920.30	842.30
Men	1,177.50	1,205.90	1,002.40	903.50
Women	904.60	916.10	847.70	764.40
Disabled workers	977.70	1,014.80	908.30	874.60
Men	1,097.40	1,149.20	978.50	961.90
Women	839.80	852.70	836.30	785.00
Widowed mothers and fathers	756.60	813.20	651.80	653.90
Nondisabled widow(er)s	1,007.80	1,031.40	804.50	976.30
Surviving children	683.70	740.40	571.30	624.70

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.

Totals do not necessarily equal the sum of rounded components.

- a. Includes 160,543 persons of unknown race. In years prior to 1993, persons of unknown race were included with White.
- 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.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).
- d. Less than 500.

CONTACT: Shirley Turpin (410) 965-0181.

## 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 2006**

Type of benefit and basis of entitlement	All races <sup>a</sup>		White		Black		Other <sup>b</sup>	
	Number (thousands)	Average monthly benefit (dollars)	Number (thousands)	Average monthly benefit (dollars)	Number (thousands)	Average monthly benefit (dollars)	Number (thousands)	Average monthly benefit (dollars)
<b>All women</b>								
Total <sup>c</sup>	25,454	870.50	21,346	884.20	2,436	810.60	1,592	780.90
Workers	18,271	893.40	15,361	907.10	1,923	844.30	926	773.30
Retired	15,107	904.60	13,191	916.10	1,357	847.70	525	764.40
Full benefit	3,705	1,028.50	3,092	1,051.70	434	928.80	167	862.80
Reduced benefit	11,401	864.40	10,099	874.60	923	809.50	358	718.40
Disabled	3,164	839.80	2,170	852.70	566	836.30	401	785.00
Wives of retired and disabled workers	2,585	506.30	2,304	522.70	128	409.60	147	336.80
Entitlement based on care of children	126	288.30	90	312.20	16	259.50	19	202.50
Husband retired	45	440.20	34	465.40	6	393.80	5	307.90
Husband disabled	81	204.70	55	217.00	11	190.80	14	169.30
Entitlement based on age	2,459	517.50	2,214	531.30	112	431.50	128	356.70
Husband retired	2,392	522.90	2,157	536.60	106	437.10	123	358.60
Full benefit	409	625.00	349	659.30	24	500.00	35	371.50
Reduced benefit	1,983	501.80	1,808	513.00	83	419.00	88	353.50
Husband disabled	67	325.20	57	327.00	5	320.30	5	310.90
Widows	4,598	984.00	3,681	1,014.90	385	775.80	519	920.10
Entitlement based on care of children	161	763.20	104	821.40	21	652.50	35	658.40
Nondisabled, aged 60 or older	4,231	1,009.30	3,467	1,032.30	333	803.90	419	981.90
Disabled, aged 50–64	206	637.70	110	647.00	30	554.10	65	662.10
<b>Women aged 65 or older</b>								
Total <sup>c</sup>	19,777	892.50	17,311	905.00	1,658	818.60	758	769.10
Entitled as worker	13,777	918.40	12,031	930.60	1,249	852.90	463	781.00
Worker only	7,915	889.30	6,635	904.90	907	828.00	356	760.30
Dually entitled	5,862	957.70	5,396	962.10	342	918.80	108	849.40
Wife's benefit	2,332	628.40	2,201	631.50	78	567.70	48	586.60
Widow's benefit	3,530	1,175.30	3,195	1,189.90	263	1,023.50	60	1,058.80
Entitled as wife or widow only	6,000	832.80	5,280	846.60	409	714.00	294	750.20
Wife's benefit	2,185	525.30	1,975	538.40	98	439.30	107	365.00
Widow's benefit	3,815	1,009.00	3,304	1,030.90	312	800.30	188	969.30

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.

Totals do not necessarily equal the sum of rounded components.

- Includes 80,254 persons of unknown race. In years prior to 1993, persons of unknown race were included with White.
- 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, special age-72 beneficiaries, and disabled adult children receiving benefits because of a childhood disability.

CONTACT: Diane Wallace (410) 965-0165.

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 2006**

Type of benefit and sex	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)
All beneficiaries	102,296	599.40	737.20
<b>Retirement benefits</b>			
Total	94,863	595.00	753.00
Retired workers	91,915	595.70	769.60
Men	19,610	565.40	502.20
Women	72,305	604.00	842.20
Wives and husbands of retired workers	2,621	570.40	232.20
Children of retired workers	327	590.50	240.50
<b>Disability benefits</b>			
Total	19	575.30	546.00
<b>Survivor benefits</b>			
Total	7,414	656.10	536.30
Nondisabled widow(er)s	6,079	655.10	550.60
Disabled widow(er)s	106	650.90	407.60
Widowed mothers and fathers	25	614.80	410.50
Children of deceased workers	1,204	662.80	477.80

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

CONTACT: Hazel P. Jenkins (410) 965-0164.

## 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 2006**

Type of benefit	Total, 60 or older	60–61	62–64	65–69	70–74	75–79	80–84	85–89	90–94	95 or older <sup>a</sup>
<b>Number (thousands)</b>										
<i>All beneficiaries</i>										
Total <sup>b</sup>	39,799	823	4,508	9,597	8,071	6,874	5,259	3,080	1,236	351
Retired workers	30,976	...	2,840	8,099	6,834	5,582	4,121	2,343	914	243
Widow(er)s, parents, and mothers and fathers	4,397	167	388	614	608	771	823	619	300	106
Wives and husbands	2,516	5	283	663	610	508	308	115	21	2
Disabled workers	1,796	632	972	193	...	...	...	...	...	...
Disabled adult children	114	19	25	29	19	12	6	3	1	<sup>c</sup>
<i>Men</i>										
Subtotal	17,003	363	1,989	4,500	3,703	2,963	2,039	1,042	335	68
Retired workers	15,869	...	1,424	4,357	3,678	2,944	2,028	1,038	333	67
Widowers, parents, and fathers	52	10	17	11	4	3	3	2	1	<sup>c</sup>
Husbands	45	<sup>c</sup>	2	11	12	10	6	2	1	<sup>c</sup>
Disabled workers	983	343	533	107	...	...	...	...	...	...
Disabled adult children	53	10	12	14	9	5	2	1	<sup>c</sup>	<sup>c</sup>
<i>Women</i>										
Subtotal	22,797	460	2,518	5,097	4,368	3,911	3,220	2,038	901	284
Retired workers	15,107	...	1,416	3,742	3,155	2,638	2,093	1,306	581	176
Widows, parents, and mothers	4,345	157	370	603	604	768	820	618	298	106
Wives	2,471	5	281	652	598	498	302	113	21	2
Disabled workers	813	289	439	86	...	...	...	...	...	...
Disabled adult children	60	9	12	15	10	7	4	2	<sup>c</sup>	<sup>c</sup>
<b>Average monthly benefit (dollars)</b>										
<i>All beneficiaries</i>										
Total <sup>b</sup>	1,006.50	1,030.00	940.60	1,046.90	988.30	989.40	997.30	1,031.20	1,110.10	1,006.80
Retired workers	1,044.40	...	937.70	1,092.30	1,030.40	1,031.50	1,034.20	1,056.00	1,153.70	1,038.30
Widow(er)s, parents, and mothers and fathers	997.60	884.30	948.60	1,026.90	996.70	1,000.10	995.50	1,030.60	1,016.30	943.80
Wives and husbands	513.20	442.80	453.80	517.30	520.40	520.80	517.80	541.60	578.90	552.90
Disabled workers	1,089.30	1,083.80	1,094.20	1,082.80	...	...	...	...	...	...
Disabled adult children	638.70	676.10	679.20	658.40	609.90	575.80	550.20	522.50	498.30	<sup>c</sup>
<i>Men</i>										
Subtotal	1,178.10	1,231.40	1,150.70	1,258.70	1,160.00	1,145.10	1,121.40	1,105.70	1,274.20	1,131.80
Retired workers	1,177.50	...	1,108.00	1,263.30	1,164.70	1,149.60	1,125.20	1,108.90	1,279.00	1,137.20
Widowers, parents, and fathers	804.50	716.00	867.90	939.30	757.60	694.70	642.20	619.60	610.00	<sup>c</sup>
Husbands	293.60	<sup>c</sup>	244.70	307.20	302.00	287.20	282.50	288.50	300.20	<sup>c</sup>
Disabled workers	1,278.90	1,263.20	1,288.90	1,279.00	...	...	...	...	...	...
Disabled adult children	636.60	667.60	673.00	652.10	602.20	572.70	539.80	521.60	<sup>c</sup>	<sup>c</sup>
<i>Women</i>										
Subtotal	878.50	871.10	774.60	859.90	842.70	871.40	918.70	993.10	1,049.10	976.80
Retired workers	904.60	...	766.40	893.00	873.90	899.60	946.10	1,014.00	1,082.00	1,000.50
Widows, parents, and mothers	999.90	895.20	952.30	1,028.50	998.30	1,001.50	996.70	1,031.80	1,017.80	945.20
Wives	517.20	444.70	455.60	520.80	524.90	525.60	522.50	546.80	589.30	573.00
Disabled workers	860.20	870.80	857.70	837.20	...	...	...	...	...	...
Disabled adult children	640.50	685.00	685.30	664.60	616.40	578.20	556.10	522.90	<sup>c</sup>	<sup>c</sup>

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 43,110 persons aged 100 or older—6,137 men and 36,973 women.

b. Includes special age-72 beneficiaries.

c. Fewer than 500 beneficiaries.

CONTACT: Diane Wallace (410) 965-0165.



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 1960–2006, selected years**

Entitlement	1960	1970	1975	1980	1985	1990	1995	2000	2005	2006
<i>Number (thousands)</i>										
All women 62 or older <sup>a</sup>	6,619	11,374	14,010	16,350	18,412	19,954	20,888	21,381	22,066	22,286
Entitled as worker <sup>b</sup>	2,866	5,753	7,586	9,304	10,805	12,037	12,974	14,013	15,291	15,631
Worker only	2,563	4,786	5,926	6,710	7,096	7,359	7,554	8,117	9,126	9,415
Dually entitled <sup>c</sup>	303	967	1,660	2,594	3,709	4,678	5,420	5,896	6,165	6,217
Wife's benefit	159	388	617	1,016	1,594	2,077	2,398	2,568	2,650	2,676
Widow's benefit	141	574	1,039	1,575	2,112	2,600	3,022	3,327	3,514	3,540
Entitled as wife or widow only <sup>c</sup>	3,753	5,621	6,424	7,046	7,607	7,917	7,914	7,368	6,775	6,654
Wife's benefit	2,174	2,546	2,745	2,884	3,018	3,059	2,985	2,768	2,511	2,466
Widow's benefit <sup>d</sup>	1,546	3,048	3,659	4,148	4,580	4,853	4,926	4,598	4,264	4,187
<i>Percentage distribution</i>										
All women 62 or older <sup>a</sup>	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Entitled as worker <sup>b</sup>	43.3	50.6	54.1	56.9	58.7	60.3	62.1	65.5	69.3	70.1
Worker only	38.7	42.1	42.3	41.0	38.5	36.9	36.2	38.0	41.4	42.3
Dually entitled <sup>c</sup>	4.6	8.5	11.8	15.9	20.1	23.4	25.9	27.6	28.0	27.9
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	15.9
Entitled as wife or widow only <sup>c</sup>	56.7	49.4	45.9	43.1	41.3	39.7	37.9	34.5	30.7	29.9
Wife's benefit	32.8	22.4	19.6	17.6	16.4	15.3	14.3	12.9	11.4	11.1
Widow's benefit <sup>d</sup>	23.4	26.8	26.1	25.4	24.9	24.3	23.6	21.5	19.3	18.8

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 special age-72 beneficiaries and 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.

**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 2006**

Entitlement	Total	65–69	70–74	75–79	80–84	85–89	90 or older
<i>Number</i>							
All women 65 or older <sup>a</sup>	19,776,626	5,081,146	4,357,390	3,903,330	3,215,332	2,035,641	1,183,787
Entitled as worker	13,776,606	3,827,159	3,155,456	2,637,880	2,093,238	1,305,668	757,205
Worker only	7,915,001	2,737,074	1,956,867	1,387,207	949,422	523,764	360,667
Dually entitled	5,861,605	1,090,085	1,198,589	1,250,673	1,143,816	781,904	396,538
Wife's benefit	2,331,841	791,363	666,347	489,882	273,746	95,475	15,028
Widow's benefit	3,529,764	298,722	532,242	760,791	870,070	686,429	381,510
Entitled as wife or widow only	6,000,020	1,253,987	1,201,934	1,265,450	1,122,094	729,973	426,582
Wife's benefit	2,185,102	651,922	597,788	497,837	302,256	112,717	22,582
Widow's benefit	3,814,918	602,065	604,146	767,613	819,838	617,256	404,000
<i>Average monthly benefit (dollars)</i>							
All women 65 or older <sup>a</sup>	892.50	860.40	843.30	871.90	919.20	993.50	1,032.10
Entitled as worker	918.40	891.80	873.90	899.60	946.10	1,014.00	1,063.10
Worker only	889.30	923.80	870.00	852.00	850.80	872.30	1,002.00
Dually entitled	957.70	811.40	880.10	952.50	1,025.20	1,108.90	1,118.60
Wife's benefit	628.40	658.30	627.90	606.00	590.90	603.40	646.30
Widow's benefit	1,175.30	1,216.80	1,195.90	1,175.60	1,161.80	1,179.20	1,137.20
Entitled as wife or widow only	832.80	764.80	762.90	814.30	869.00	956.90	977.20
Wife's benefit	525.30	520.80	524.90	525.60	522.50	546.80	588.00
Widow's benefit	1,009.00	1,029.00	998.30	1,001.50	996.80	1,031.80	998.90

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

- a. Excludes parents, special age-72 beneficiaries, and disabled adult children.

CONTACT: Diane Wallace (410) 965-0165.

## 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 2006**

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
<b>All adult beneficiaries</b>								
Total <sup>a</sup>	45,859	6,883	4,508	34,468	990.10	900.00	940.60	1,014.60
Retired workers	30,976	...	2,840	28,136	1,044.40	...	937.70	1,055.20
Disabled workers	6,807	5,642	972	193	977.70	954.00	1,094.20	1,082.80
Wives and husbands of retired workers	2,479	39	242	2,198	517.60	431.60	478.80	523.40
Wives and husbands of disabled workers	153	82	42	30	257.80	202.50	308.30	339.10
Nondisabled widow(er)s	4,273	121	319	3,833	1,007.80	977.40	1,014.20	1,008.20
Disabled widow(er)s	220	151	63	6	630.70	632.40	627.40	621.10
Mothers and fathers	171	165	5	1	756.60	754.60	821.40	778.40
Disabled adult children	777	682	25	70	642.40	644.00	679.20	613.90
<b>Men</b>								
Subtotal	20,050	3,411	1,989	14,650	1,148.10	1,007.00	1,150.70	1,180.60
Retired workers	15,869	...	1,424	14,445	1,177.50	...	1,108.00	1,184.30
Disabled workers	3,643	3,003	533	107	1,097.40	1,057.00	1,288.90	1,279.00
Husbands of retired workers	42	<sup>b</sup>	2	40	298.30	<sup>b</sup>	276.70	299.00
Husbands of disabled workers	5	2	1	2	208.40	162.60	183.80	250.70
Nondisabled widowers	48	8	15	24	829.10	765.50	911.60	798.40
Disabled widowers	8	6	2	<sup>b</sup>	455.00	454.90	455.90	<sup>b</sup>
Fathers	11	11	<sup>b</sup>	<sup>b</sup>	657.20	655.80	<sup>b</sup>	<sup>b</sup>
Disabled adult children	424	381	12	31	640.20	641.40	673.00	612.40
<b>Women</b>								
Subtotal	25,808	3,472	2,518	19,818	867.40	794.80	774.60	891.90
Retired workers	15,107	...	1,416	13,691	904.60	...	766.40	918.90
Disabled workers	3,164	2,639	439	86	839.80	836.90	857.70	837.20
Wives of retired workers	2,437	39	240	2,157	521.40	431.60	480.20	527.60
Wives of disabled workers	149	80	41	28	259.40	203.40	310.80	346.60
Nondisabled widows	4,226	112	304	3,809	1,009.80	993.20	1,019.40	1,009.50
Disabled widows	212	145	62	5	637.40	640.30	631.80	624.50
Mothers	161	155	5	1	763.20	761.30	823.70	779.80
Disabled adult children	352	302	12	38	645.10	647.20	685.30	615.00

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 and special age-72 beneficiaries. Excludes student beneficiaries aged 18–19.

b. Fewer than 500 beneficiaries.

CONTACT: Diane Wallace (410) 965-0165.

5.A OASDI Current-Pay Benefits: Summary

**Table 5.A17—Number and average monthly benefit for disabled beneficiaries, by type of benefit, December 1957–2006**

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

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: ... = not applicable.

CONTACT: Hazel P. Jenkins (410) 965-0164.

## 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 2006**

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	3,365,126	1,244.10	1,363.40	1,982,440	1,396.80	1,495.70	1,382,686	1,025.20	1,173.70
66–69	138,016	1,131.40	1,214.90	68,888	1,274.30	1,343.30	69,128	989.00	1,086.90
66	12,232	1,292.80	1,324.40	6,776	1,453.10	1,478.10	5,456	1,093.70	1,133.50
67	34,448	1,196.00	1,258.50	18,320	1,340.20	1,396.00	16,128	1,032.10	1,102.30
68	43,130	1,123.70	1,210.40	21,313	1,262.40	1,336.70	21,817	988.10	1,087.10
69	48,206	1,051.20	1,160.00	22,479	1,177.80	1,266.00	25,727	940.60	1,067.30
70–74	773,283	1,226.20	1,329.80	447,995	1,388.80	1,470.50	325,288	1,002.20	1,136.00
70	57,460	992.30	1,139.20	23,092	1,101.90	1,200.60	34,368	918.70	1,098.00
71	60,098	967.30	1,114.60	24,229	1,073.60	1,168.80	35,869	895.60	1,078.00
72	226,611	1,275.00	1,344.30	139,363	1,424.90	1,471.60	87,248	1,035.40	1,140.80
73	216,710	1,261.20	1,363.00	132,395	1,414.70	1,501.30	84,315	1,020.20	1,145.90
74	212,404	1,275.00	1,393.00	128,916	1,433.90	1,542.80	83,488	1,029.60	1,161.70
75–79	978,151	1,243.60	1,380.60	594,659	1,401.80	1,529.80	383,492	998.20	1,149.20
75	208,030	1,247.70	1,383.70	126,847	1,403.90	1,534.00	81,183	1,003.50	1,148.90
76	205,528	1,237.70	1,375.90	125,425	1,396.40	1,529.00	80,103	989.20	1,136.20
77	193,879	1,225.40	1,369.20	117,654	1,382.60	1,518.30	76,225	982.70	1,139.00
78	188,540	1,248.40	1,381.20	113,701	1,411.00	1,532.20	74,839	1,001.40	1,151.80
79	182,174	1,259.90	1,393.70	111,032	1,416.20	1,535.60	71,142	1,015.90	1,172.20
80–84	765,831	1,229.50	1,354.10	467,123	1,374.70	1,473.60	298,708	1,002.60	1,167.10
80	175,859	1,242.40	1,364.60	107,184	1,393.90	1,495.90	68,675	1,006.00	1,159.60
81	153,398	1,263.80	1,394.20	93,166	1,417.50	1,528.20	60,232	1,026.00	1,187.00
82	159,634	1,231.00	1,349.50	97,496	1,375.80	1,467.30	62,138	1,003.90	1,164.70
83	145,279	1,208.40	1,332.50	89,189	1,346.00	1,440.20	56,090	989.70	1,161.30
84	131,661	1,193.90	1,322.60	80,088	1,329.70	1,425.30	51,573	983.10	1,163.10
85–89	462,887	1,218.70	1,354.70	275,249	1,354.50	1,453.10	187,638	1,019.40	1,210.30
85	123,685	1,185.60	1,317.90	75,269	1,318.60	1,414.00	48,416	978.80	1,168.40
86	109,721	1,170.50	1,306.90	66,392	1,297.70	1,393.30	43,329	975.70	1,174.60
87	87,601	1,201.40	1,338.40	52,079	1,333.90	1,431.70	35,522	1,007.30	1,201.70
88	76,272	1,280.90	1,420.90	43,928	1,430.40	1,535.30	32,344	1,078.00	1,265.50
89	65,608	1,312.30	1,448.60	37,581	1,466.90	1,570.30	28,027	1,105.00	1,285.40
90 or older	246,958	1,458.30	1,528.60	128,526	1,638.00	1,679.00	118,432	1,263.20	1,365.50

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

CONTACT: Shirley Turpin (410) 965-0181.

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 2006**

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	5,011,899	1,069.30	1,128.70	2,689,249	1,288.70	1,289.90	2,322,650	815.20	942.00
65–69	1,876,580	1,239.40	1,267.90	1,102,487	1,440.30	1,440.50	774,093	953.30	1,022.10
65	141,577	1,279.50	1,290.60	83,713	1,484.20	1,483.50	57,864	983.40	1,011.50
66	459,653	1,279.30	1,302.70	270,846	1,481.00	1,481.00	188,807	990.00	1,046.90
67	431,537	1,244.20	1,272.60	253,302	1,443.70	1,443.90	178,235	960.60	1,029.10
68	424,620	1,222.90	1,256.30	248,365	1,425.20	1,425.70	176,255	937.90	1,017.70
69	419,193	1,193.60	1,229.00	246,261	1,392.10	1,392.70	172,932	911.00	995.90
70–74	1,466,574	1,059.30	1,108.60	815,961	1,258.90	1,260.00	650,613	809.00	918.70
70	405,750	1,158.20	1,195.40	239,676	1,348.00	1,348.80	166,074	884.20	974.00
71	412,821	1,141.50	1,179.80	244,277	1,328.00	1,328.80	168,544	871.30	963.80
72	241,504	955.50	1,016.50	124,467	1,153.50	1,154.90	117,037	744.90	869.30
73	208,652	940.90	1,005.20	107,182	1,138.60	1,140.10	101,470	732.10	862.70
74	197,847	936.60	1,003.60	100,359	1,137.30	1,139.00	97,488	729.90	864.30
75–79	778,762	902.80	986.50	387,434	1,112.60	1,114.60	391,328	695.10	859.70
75	180,485	916.80	991.00	91,089	1,119.00	1,120.60	89,396	710.80	858.90
76	170,794	905.00	984.20	85,660	1,107.70	1,109.80	85,134	701.00	857.80
77	152,229	890.10	976.90	75,238	1,100.20	1,102.20	76,991	684.80	854.40
78	144,797	901.40	989.00	70,943	1,117.40	1,119.60	73,854	694.00	863.50
79	130,457	897.10	991.70	64,504	1,119.30	1,121.40	65,953	679.70	864.90
80–84	496,692	866.90	978.70	231,756	1,091.10	1,093.80	264,936	670.70	878.00
80	119,595	882.40	983.80	58,665	1,103.80	1,106.00	60,930	669.20	866.20
81	111,714	894.10	998.00	53,381	1,119.80	1,122.20	58,333	687.60	884.40
82	99,427	858.50	973.00	45,596	1,085.00	1,087.60	53,831	666.70	876.00
83	87,368	843.10	963.10	39,311	1,064.90	1,068.40	48,057	661.60	877.00
84	78,588	841.50	967.80	34,803	1,063.20	1,066.10	43,785	665.30	889.70
85–89	264,230	857.50	990.30	109,324	1,077.80	1,081.60	154,906	702.10	925.90
85	71,253	838.50	971.20	30,790	1,061.30	1,064.90	40,463	668.90	899.90
86	61,192	827.60	965.10	25,615	1,047.70	1,051.80	35,577	669.00	902.80
87	49,271	847.90	980.60	20,251	1,066.10	1,070.00	29,020	695.60	918.10
88	44,594	889.70	1,020.20	17,887	1,106.20	1,109.60	26,707	744.70	960.40
89	37,920	916.30	1,044.40	14,781	1,145.80	1,150.20	23,139	769.80	976.80
90 or older	129,061	925.50	1,050.70	42,287	1,152.20	1,157.90	86,774	815.00	998.50

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

CONTACT: Shirley Turpin (410) 965-0181.

## 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 2006**

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	3,878,100	1,311.50	1,334.80	2,217,200	1,443.50	1,468.80	1,660,900	1,135.30	1,156.00
66-69	143,100	1,174.60	1,185.70	70,200	1,300.30	1,310.70	72,900	1,053.60	1,065.40
66	12,200	1,299.50	1,302.70	6,000	1,449.10	1,452.70	6,200	1,154.60	1,157.50
67	35,700	1,211.60	1,219.30	18,500	1,344.90	1,352.90	17,200	1,068.10	1,075.50
68	45,700	1,183.20	1,194.90	21,700	1,344.20	1,355.70	24,000	1,037.60	1,049.50
69	49,500	1,109.40	1,124.20	24,000	1,189.10	1,201.90	25,500	1,034.30	1,051.00
70-74	845,900	1,307.60	1,324.20	485,000	1,448.30	1,463.40	360,900	1,118.50	1,137.10
70	62,500	1,162.00	1,186.70	25,700	1,259.60	1,278.40	36,800	1,093.80	1,122.70
71	63,300	1,075.80	1,099.10	23,500	1,089.60	1,104.40	39,800	1,067.60	1,096.00
72	227,200	1,334.70	1,344.90	141,800	1,461.70	1,470.30	85,400	1,123.70	1,136.80
73	255,100	1,330.90	1,346.60	151,500	1,476.80	1,492.30	103,600	1,117.60	1,133.60
74	237,800	1,356.70	1,376.40	142,500	1,497.80	1,518.60	95,300	1,145.70	1,163.90
75-79	1,147,300	1,323.20	1,347.40	678,600	1,474.00	1,500.90	468,700	1,105.00	1,125.20
75	239,300	1,335.80	1,358.50	141,100	1,488.10	1,512.90	98,200	1,116.90	1,136.70
76	248,600	1,312.50	1,336.50	148,300	1,459.40	1,486.50	100,300	1,095.40	1,114.80
77	226,100	1,314.20	1,338.80	132,800	1,459.90	1,487.20	93,300	1,106.80	1,127.60
78	218,300	1,313.70	1,338.40	126,400	1,477.00	1,505.00	91,900	1,089.10	1,109.20
79	215,000	1,340.90	1,365.80	130,000	1,486.60	1,514.30	85,000	1,118.10	1,138.70
80-84	890,200	1,291.90	1,317.30	522,900	1,406.10	1,434.10	367,300	1,129.30	1,151.10
80	201,400	1,301.50	1,324.70	118,900	1,413.10	1,437.80	82,500	1,140.60	1,161.70
81	180,000	1,318.90	1,344.70	101,400	1,465.60	1,495.10	78,600	1,129.60	1,150.60
82	187,100	1,287.30	1,312.80	111,100	1,415.80	1,444.30	76,000	1,099.50	1,120.50
83	167,800	1,271.70	1,297.10	99,900	1,370.90	1,398.70	67,900	1,125.60	1,147.70
84	153,900	1,275.30	1,303.20	91,600	1,357.80	1,388.10	62,300	1,154.10	1,178.40
85-89	549,000	1,282.20	1,309.10	311,500	1,381.80	1,412.00	237,500	1,151.60	1,174.30
85	145,100	1,232.30	1,258.20	83,500	1,326.00	1,354.20	61,600	1,105.30	1,127.90
86	130,200	1,237.30	1,263.30	75,000	1,323.20	1,352.20	55,200	1,120.60	1,142.60
87	103,600	1,293.70	1,321.20	61,300	1,383.20	1,414.60	42,300	1,164.00	1,185.90
88	93,400	1,338.20	1,367.00	50,500	1,458.80	1,491.60	42,900	1,196.10	1,220.20
89	76,700	1,369.30	1,396.60	41,200	1,505.20	1,536.20	35,500	1,211.60	1,234.60
90 or older	302,600	1,453.30	1,485.60	149,000	1,616.50	1,655.00	153,600	1,295.10	1,321.30

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

CONTACT: Shirley Turpin (410) 965-0181.

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 2006

Year of entitlement	All retired workers				Men				Women			
	Number	Percent- age distribu- tion	Cumula- tive percent- age <sup>a</sup>	Average monthly benefit (dollars)	Number	Percent- age distribu- tion	Cumula- tive percent- age <sup>a</sup>	Average monthly benefit (dollars)	Number	Percent- age distribu- tion	Cumula- tive percent- age <sup>a</sup>	Average monthly benefit (dollars)
Total	30,976,143	100.0	...	1,044.40	15,869,182	100.0	...	1,177.50	15,106,961	100.0	...	904.60
<i>Summary data</i>												
2000–2006	11,959,110	38.6	...	1,075.10	6,374,771	40.2	...	1,244.40	5,584,339	37.0	...	881.80
1995–1999	6,570,404	21.2	...	1,023.10	3,493,280	22.0	...	1,161.30	3,077,124	20.4	...	866.10
1990–1994	5,363,981	17.3	...	1,022.90	2,850,578	18.0	...	1,137.80	2,513,403	16.6	...	892.60
1985–1989	3,884,868	12.5	...	1,010.40	1,899,035	12.0	...	1,091.60	1,985,833	13.1	...	932.80
1980–1984	2,166,335	7.0	...	1,048.00	927,793	5.8	...	1,093.80	1,238,542	8.2	...	1,013.60
1975–1979	812,137	2.6	...	1,080.70	273,300	1.7	...	1,150.90	538,837	3.6	...	1,045.00
1970–1974	195,897	0.6	...	979.50	46,743	0.3	...	1,001.20	149,154	1.0	...	972.70
1965–1969	22,099	0.1	...	898.10	3,543	<sup>b</sup>	...	921.70	18,556	0.1	...	893.60
Before 1965	1,312	<sup>b</sup>	...	783.10	139	<sup>b</sup>	...	727.60	1,173	<sup>b</sup>	...	789.60
<i>Single-year data</i>												
2006	1,811,170	5.8	5.8	1,073.30	944,496	6.0	6.0	1,256.40	866,674	5.7	5.7	873.70
2005	1,878,954	6.1	11.9	1,064.70	983,877	6.2	12.2	1,237.10	895,077	5.9	11.7	875.20
2004	1,750,612	5.7	17.6	1,071.70	923,384	5.8	18.0	1,244.90	827,228	5.5	17.1	878.40
2003	1,640,818	5.3	22.9	1,084.40	873,046	5.5	23.5	1,256.00	767,772	5.1	22.2	889.20
2002	1,636,854	5.3	28.1	1,085.00	881,279	5.6	29.0	1,251.00	755,575	5.0	27.2	891.40
2001	1,561,623	5.0	33.2	1,063.60	844,259	5.3	34.3	1,220.70	717,364	4.7	32.0	878.70
2000	1,679,079	5.4	38.6	1,084.10	924,430	5.8	40.2	1,243.70	754,649	5.0	37.0	888.50
1999	1,455,191	4.7	43.3	1,044.20	787,132	5.0	45.1	1,193.20	668,059	4.4	41.4	868.60
1998	1,336,867	4.3	47.6	1,019.40	711,491	4.5	49.6	1,161.60	625,376	4.1	45.5	857.60
1997	1,296,935	4.2	51.8	1,015.70	684,614	4.3	53.9	1,154.60	612,321	4.1	49.6	860.40
1996	1,285,144	4.1	56.0	1,014.60	663,381	4.2	58.1	1,146.00	621,763	4.1	53.7	874.30
1995	1,196,267	3.9	59.8	1,018.60	646,662	4.1	62.2	1,145.20	549,605	3.6	57.3	869.70
1994	1,162,980	3.8	63.6	1,021.70	625,284	3.9	66.1	1,146.10	537,696	3.6	60.9	877.10
1993	1,122,282	3.6	67.2	1,020.90	602,764	3.8	69.9	1,139.10	519,518	3.4	64.3	883.70
1992	1,095,366	3.5	70.7	1,022.40	585,548	3.7	73.6	1,136.40	509,818	3.4	67.7	891.50
1991	1,019,336	3.3	74.0	1,023.50	539,526	3.4	77.0	1,132.10	479,810	3.2	70.9	901.40
1990	964,017	3.1	77.1	1,026.70	497,456	3.1	80.1	1,133.70	466,561	3.1	74.0	912.60
1989	894,194	2.9	80.0	1,018.00	452,677	2.9	83.0	1,116.30	441,517	2.9	76.9	917.20
1988	828,823	2.7	82.7	1,009.20	410,744	2.6	85.6	1,098.30	418,079	2.8	79.7	921.80
1987	781,206	2.5	85.2	1,012.40	380,093	2.4	88.0	1,094.50	401,113	2.7	82.3	934.60
1986	734,936	2.4	87.6	1,007.00	352,913	2.2	90.2	1,077.20	382,023	2.5	84.8	942.10
1985	645,709	2.1	89.7	1,003.10	302,608	1.9	92.1	1,058.70	343,101	2.3	87.1	954.10
1984	558,415	1.8	91.5	1,004.20	252,946	1.6	93.7	1,048.70	305,469	2.0	89.1	967.30
1983	507,750	1.6	93.1	1,026.90	224,013	1.4	95.1	1,066.60	283,737	1.9	91.0	995.60
1982	433,113	1.4	94.5	1,045.90	185,077	1.2	96.3	1,084.10	248,036	1.6	92.7	1,017.40
1981	359,814	1.2	95.7	1,094.60	147,541	0.9	97.2	1,152.30	212,273	1.4	94.1	1,054.50
1980	307,243	1.0	96.7	1,110.70	118,216	0.7	98.0	1,184.10	189,027	1.3	95.3	1,064.90
1979	248,658	0.8	97.5	1,117.10	90,375	0.6	98.5	1,200.10	158,283	1.0	96.4	1,069.70
1978	193,485	0.6	98.1	1,095.50	66,132	0.4	98.9	1,169.80	127,353	0.8	97.2	1,057.00
1977	145,174	0.5	98.6	1,071.70	48,883	0.3	99.3	1,140.20	96,291	0.6	97.8	1,036.90
1976	128,616	0.4	99.0	1,043.90	39,633	0.2	99.5	1,091.50	88,983	0.6	98.4	1,022.80
1975	96,204	0.3	99.3	1,019.10	28,277	0.2	99.7	1,051.00	67,927	0.4	98.9	1,005.90

(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 2006—Continued**

Year of entitlement	All retired workers				Men				Women			
	Number	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)
<i>Single-year data (cont.)</i>												
1974	72,175	0.2	99.5	1,000.10	19,179	0.1	99.8	1,022.40	52,996	0.4	99.2	992.10
1973	51,180	0.2	99.7	980.70	12,207	0.1	99.9	1,001.80	38,973	0.3	99.5	974.10
1972	34,244	0.1	99.8	968.90	7,527	b	99.9	992.00	26,717	0.2	99.7	962.40
1971	23,306	0.1	99.9	956.20	4,914	b	100.0	965.70	18,392	0.1	99.8	953.70
1970	14,992	b	99.9	936.30	2,916	b	100.0	943.40	12,076	0.1	99.9	934.60
1969	9,540	b	100.0	925.50	1,693	b	100.0	954.60	7,847	0.1	99.9	919.30
1968	5,789	b	100.0	899.80	949	b	100.0	907.90	4,840	b	100.0	898.20
1967	3,560	b	100.0	867.60	503	b	100.0	886.30	3,057	b	100.0	864.50
1966	2,089	b	100.0	862.10	268	b	100.0	886.10	1,821	b	100.0	858.50
1965	1,121	b	100.0	820.50	130	b	100.0	805.50	991	b	100.0	822.50

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

... = not applicable.

Totals do not necessarily equal the sum of rounded components.

a. Represents those entitled in specified year or later.

b. Less than 0.05 percent.

CONTACT: Shirley Turpin (410) 965-0181.



5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B5—Number, average age, and percentage distribution, by sex and age, December 1940–2006, 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

(Continued)

## 5.B OASDI Current-Pay Benefits: Retired Workers

**Table 5.B5—Number, average age, and percentage distribution, by sex and age, December 1940–2006, 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
<b>Women</b>									
1940	13	68.1	100.0	...	82.6	12.8	3.9	0.6	<sup>a</sup>
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

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: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

... = not applicable.

Totals do not necessarily equal the sum of rounded components.

a. Less than 0.05 percent.

CONTACT: Alberta Presberry (410) 966-8473.

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 2006**

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	30,976,143	100.0	8,378,799	100.0	22,597,344	100.0
Less than 400.00	1,629,608	5.3	351,078	4.2	1,278,530	5.7
400.00–449.90	461,157	1.5	76,196	0.9	384,961	1.7
450.00–499.90	678,775	2.2	87,134	1.0	591,641	2.6
500.00–549.90	926,652	3.0	135,811	1.6	790,841	3.5
550.00–599.90	1,204,791	3.9	179,026	2.1	1,025,765	4.5
600.00–649.90	1,298,672	4.2	216,832	2.6	1,081,840	4.8
650.00–699.90	1,242,420	4.0	241,852	2.9	1,000,568	4.4
700.00–749.90	1,209,287	3.9	264,316	3.2	944,971	4.2
750.00–799.90	1,131,994	3.7	268,217	3.2	863,777	3.8
800.00–849.90	1,081,915	3.5	265,326	3.2	816,589	3.6
850.00–899.90	1,082,191	3.5	261,023	3.1	821,168	3.6
900.00–949.90	1,121,708	3.6	266,178	3.2	855,530	3.8
950.00–999.90	1,158,606	3.7	264,759	3.2	893,847	4.0
1,000.00–1,049.90	1,228,371	4.0	266,804	3.2	961,567	4.3
1,050.00–1,099.90	1,327,680	4.3	273,130	3.3	1,054,550	4.7
1,100.00–1,149.90	1,330,921	4.3	275,101	3.3	1,055,820	4.7
1,150.00–1,199.90	1,482,320	4.8	284,935	3.4	1,197,385	5.3
1,200.00–1,249.90	1,462,645	4.7	282,858	3.4	1,179,787	5.2
1,250.00–1,299.90	1,292,685	4.2	284,680	3.4	1,008,005	4.5
1,300.00–1,349.90	1,248,645	4.0	295,654	3.5	952,991	4.2
1,350.00–1,399.90	1,141,330	3.7	305,895	3.7	835,435	3.7
1,400.00–1,449.90	1,045,337	3.4	320,062	3.8	725,275	3.2
1,450.00–1,499.90	984,020	3.2	358,253	4.3	625,767	2.8
1,500.00–1,549.90	814,064	2.6	335,289	4.0	478,775	2.1
1,550.00–1,599.90	625,710	2.0	304,669	3.6	321,041	1.4
1,600.00–1,649.90	492,030	1.6	280,299	3.3	211,731	0.9
1,650.00–1,699.90	411,147	1.3	247,952	3.0	163,195	0.7
1,700.00–1,749.90	348,511	1.1	226,533	2.7	121,978	0.5
1,750.00–1,799.90	288,161	0.9	195,002	2.3	93,159	0.4
1,800.00–1,849.90	242,522	0.8	170,652	2.0	71,870	0.3
1,850.00–1,899.90	211,744	0.7	155,573	1.9	56,171	0.2
1,900.00 or more	770,524	2.5	637,710	7.6	132,814	0.6
Average benefit (dollars)	1,044.40		1,222.90		978.20	

(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 2006—Continued**

Sex and monthly benefit (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Men	15,869,182	100.0	4,672,739	100.0	11,196,443	100.0
Less than 400.00	740,841	4.7	170,165	3.6	570,676	5.1
400.00–449.90	165,696	1.0	32,461	0.7	133,235	1.2
450.00–499.90	214,126	1.3	34,107	0.7	180,019	1.6
500.00–549.90	253,264	1.6	48,923	1.0	204,341	1.8
550.00–599.90	279,982	1.8	61,823	1.3	218,159	1.9
600.00–649.90	295,446	1.9	68,857	1.5	226,589	2.0
650.00–699.90	311,830	2.0	71,024	1.5	240,806	2.2
700.00–749.90	332,316	2.1	73,933	1.6	258,383	2.3
750.00–799.90	356,080	2.2	75,578	1.6	280,502	2.5
800.00–849.90	385,985	2.4	79,042	1.7	306,943	2.7
850.00–899.90	425,367	2.7	83,368	1.8	341,999	3.1
900.00–949.90	476,670	3.0	91,848	2.0	384,822	3.4
950.00–999.90	531,731	3.4	96,395	2.1	435,336	3.9
1,000.00–1,049.90	615,924	3.9	103,666	2.2	512,258	4.6
1,050.00–1,099.90	708,699	4.5	112,943	2.4	595,756	5.3
1,100.00–1,149.90	745,478	4.7	120,292	2.6	625,186	5.6
1,150.00–1,199.90	914,647	5.8	133,233	2.9	781,414	7.0
1,200.00–1,249.90	941,250	5.9	142,009	3.0	799,241	7.1
1,250.00–1,299.90	848,880	5.3	156,074	3.3	692,806	6.2
1,300.00–1,349.90	847,011	5.3	177,891	3.8	669,120	6.0
1,350.00–1,399.90	796,444	5.0	198,766	4.3	597,678	5.3
1,400.00–1,449.90	746,873	4.7	220,470	4.7	526,403	4.7
1,450.00–1,499.90	716,722	4.5	259,193	5.5	457,529	4.1
1,500.00–1,549.90	606,322	3.8	248,909	5.3	357,413	3.2
1,550.00–1,599.90	463,808	2.9	232,279	5.0	231,529	2.1
1,600.00–1,649.90	362,118	2.3	217,911	4.7	144,207	1.3
1,650.00–1,699.90	307,651	1.9	195,466	4.2	112,185	1.0
1,700.00–1,749.90	266,286	1.7	181,624	3.9	84,662	0.8
1,750.00–1,799.90	224,166	1.4	158,685	3.4	65,481	0.6
1,800.00–1,849.90	192,508	1.2	141,380	3.0	51,128	0.5
1,850.00–1,899.90	171,884	1.1	131,798	2.8	40,086	0.4
1,900.00 or more	623,177	3.9	552,626	11.8	70,551	0.6
Average benefit (dollars)	1,177.50		1,377.20		1,094.10	

(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 2006—Continued**

Sex and monthly benefit (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	15,106,961	100.0	3,706,060	100.0	11,400,901	100.0
Less than 400.00	888,767	5.9	180,913	4.9	707,854	6.2
400.00–449.90	295,461	2.0	43,735	1.2	251,726	2.2
450.00–499.90	464,649	3.1	53,027	1.4	411,622	3.6
500.00–549.90	673,388	4.5	86,888	2.3	586,500	5.1
550.00–599.90	924,809	6.1	117,203	3.2	807,606	7.1
600.00–649.90	1,003,226	6.6	147,975	4.0	855,251	7.5
650.00–699.90	930,590	6.2	170,828	4.6	759,762	6.7
700.00–749.90	876,971	5.8	190,383	5.1	686,588	6.0
750.00–799.90	775,914	5.1	192,639	5.2	583,275	5.1
800.00–849.90	695,930	4.6	186,284	5.0	509,646	4.5
850.00–899.90	656,824	4.3	177,655	4.8	479,169	4.2
900.00–949.90	645,038	4.3	174,330	4.7	470,708	4.1
950.00–999.90	626,875	4.1	168,364	4.5	458,511	4.0
1,000.00–1,049.90	612,447	4.1	163,138	4.4	449,309	3.9
1,050.00–1,099.90	618,981	4.1	160,187	4.3	458,794	4.0
1,100.00–1,149.90	585,443	3.9	154,809	4.2	430,634	3.8
1,150.00–1,199.90	567,673	3.8	151,702	4.1	415,971	3.6
1,200.00–1,249.90	521,395	3.5	140,849	3.8	380,546	3.3
1,250.00–1,299.90	443,805	2.9	128,606	3.5	315,199	2.8
1,300.00–1,349.90	401,634	2.7	117,763	3.2	283,871	2.5
1,350.00–1,399.90	344,886	2.3	107,129	2.9	237,757	2.1
1,400.00–1,449.90	298,464	2.0	99,592	2.7	198,872	1.7
1,450.00–1,499.90	267,298	1.8	99,060	2.7	168,238	1.5
1,500.00–1,549.90	207,742	1.4	86,380	2.3	121,362	1.1
1,550.00–1,599.90	161,902	1.1	72,390	2.0	89,512	0.8
1,600.00–1,649.90	129,912	0.9	62,388	1.7	67,524	0.6
1,650.00–1,699.90	103,496	0.7	52,486	1.4	51,010	0.4
1,700.00–1,749.90	82,225	0.5	44,909	1.2	37,316	0.3
1,750.00–1,799.90	63,995	0.4	36,317	1.0	27,678	0.2
1,800.00–1,849.90	50,014	0.3	29,272	0.8	20,742	0.2
1,850.00–1,899.90	39,860	0.3	23,775	0.6	16,085	0.1
1,900.00 or more	147,347	1.0	85,084	2.3	62,263	0.5
Average benefit (dollars)	904.60		1,028.40		864.40	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

Totals do not necessarily equal the sum of rounded components.

CONTACT: Hazel P. Jenkins (410) 965-0164.

## 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 2006**

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	30,976,143	100.0	8,378,799	100.0	22,597,344	100.0
Less than 400.00	2,703,919	8.7	574,372	6.9	2,129,547	9.4
400.00–449.90	552,306	1.8	116,277	1.4	436,029	1.9
450.00–499.90	602,914	1.9	128,761	1.5	474,153	2.1
500.00–549.90	902,429	2.9	212,059	2.5	690,370	3.1
550.00–599.90	1,044,454	3.4	251,307	3.0	793,147	3.5
600.00–649.90	1,155,699	3.7	263,699	3.1	892,000	3.9
650.00–699.90	1,135,040	3.7	265,147	3.2	869,893	3.8
700.00–749.90	1,138,987	3.7	263,763	3.1	875,224	3.9
750.00–799.90	1,056,253	3.4	255,146	3.0	801,107	3.5
800.00–849.90	1,027,173	3.3	255,859	3.1	771,314	3.4
850.00–899.90	991,310	3.2	254,197	3.0	737,113	3.3
900.00–949.90	980,749	3.2	261,568	3.1	719,181	3.2
950.00–999.90	945,153	3.1	257,769	3.1	687,384	3.0
1,000.00–1,049.90	927,788	3.0	256,001	3.1	671,787	3.0
1,050.00–1,099.90	924,999	3.0	258,525	3.1	666,474	2.9
1,100.00–1,149.90	903,838	2.9	251,964	3.0	651,874	2.9
1,150.00–1,199.90	918,719	3.0	256,722	3.1	661,997	2.9
1,200.00–1,249.90	917,866	3.0	252,095	3.0	665,771	2.9
1,250.00–1,299.90	959,706	3.1	260,710	3.1	698,996	3.1
1,300.00–1,349.90	1,039,849	3.4	280,675	3.3	759,174	3.4
1,350.00–1,399.90	1,043,437	3.4	300,981	3.6	742,456	3.3
1,400.00–1,449.90	1,101,939	3.6	325,733	3.9	776,206	3.4
1,450.00–1,499.90	1,293,462	4.2	383,042	4.6	910,420	4.0
1,500.00–1,549.90	1,150,679	3.7	341,903	4.1	808,776	3.6
1,550.00–1,599.90	949,821	3.1	306,302	3.7	643,519	2.8
1,600.00–1,649.90	790,710	2.6	283,636	3.4	507,074	2.2
1,650.00–1,699.90	677,695	2.2	242,176	2.9	435,519	1.9
1,700.00–1,749.90	669,895	2.2	217,525	2.6	452,370	2.0
1,750.00–1,799.90	561,430	1.8	168,653	2.0	392,777	1.7
1,800.00–1,849.90	480,758	1.6	140,313	1.7	340,445	1.5
1,850.00–1,899.90	421,135	1.4	135,304	1.6	285,831	1.3
1,900.00 or more	1,006,031	3.2	356,615	4.3	649,416	2.9
Average primary insurance amount (dollars)	1,072.20		1,139.50		1,047.30	

(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 2006—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	15,869,182	100.0	4,672,739	100.0	11,196,443	100.0
Less than 400.00	618,056	3.9	181,254	3.9	436,802	3.9
400.00–449.90	119,891	0.8	33,142	0.7	86,749	0.8
450.00–499.90	127,877	0.8	35,725	0.8	92,152	0.8
500.00–549.90	178,677	1.1	54,552	1.2	124,125	1.1
550.00–599.90	210,740	1.3	65,221	1.4	145,519	1.3
600.00–649.90	243,073	1.5	70,722	1.5	172,351	1.5
650.00–699.90	252,755	1.6	73,080	1.6	179,675	1.6
700.00–749.90	265,669	1.7	74,400	1.6	191,269	1.7
750.00–799.90	267,987	1.7	76,161	1.6	191,826	1.7
800.00–849.90	282,994	1.8	79,995	1.7	202,999	1.8
850.00–899.90	299,879	1.9	84,201	1.8	215,678	1.9
900.00–949.90	327,243	2.1	93,023	2.0	234,220	2.1
950.00–999.90	349,540	2.2	97,899	2.1	251,641	2.2
1,000.00–1,049.90	381,165	2.4	105,077	2.2	276,088	2.5
1,050.00–1,099.90	421,269	2.7	116,027	2.5	305,242	2.7
1,100.00–1,149.90	456,895	2.9	123,068	2.6	333,827	3.0
1,150.00–1,199.90	511,582	3.2	137,346	2.9	374,236	3.3
1,200.00–1,249.90	559,950	3.5	146,244	3.1	413,706	3.7
1,250.00–1,299.90	642,863	4.1	164,559	3.5	478,304	4.3
1,300.00–1,349.90	757,192	4.8	192,552	4.1	564,640	5.0
1,350.00–1,399.90	798,414	5.0	220,865	4.7	577,549	5.2
1,400.00–1,449.90	880,792	5.6	250,342	5.4	630,450	5.6
1,450.00–1,499.90	1,076,217	6.8	304,714	6.5	771,503	6.9
1,500.00–1,549.90	977,337	6.2	278,404	6.0	698,933	6.2
1,550.00–1,599.90	814,282	5.1	255,875	5.5	558,407	5.0
1,600.00–1,649.90	676,968	4.3	242,128	5.2	434,840	3.9
1,650.00–1,699.90	578,716	3.6	207,667	4.4	371,049	3.3
1,700.00–1,749.90	568,061	3.6	188,884	4.0	379,177	3.4
1,750.00–1,799.90	483,954	3.0	147,118	3.1	336,836	3.0
1,800.00–1,849.90	423,813	2.7	123,803	2.6	300,010	2.7
1,850.00–1,899.90	379,989	2.4	122,356	2.6	257,633	2.3
1,900.00 or more	935,342	5.9	326,335	7.0	609,007	5.4
Average primary insurance amount (dollars)	1,311.00		1,334.60		1,301.20	

(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 2006—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	15,106,961	100.0	3,706,060	100.0	11,400,901	100.0
Less than 400.00	2,085,863	13.8	393,118	10.6	1,692,745	14.8
400.00–449.90	432,415	2.9	83,135	2.2	349,280	3.1
450.00–499.90	475,037	3.1	93,036	2.5	382,001	3.4
500.00–549.90	723,752	4.8	157,507	4.2	566,245	5.0
550.00–599.90	833,714	5.5	186,086	5.0	647,628	5.7
600.00–649.90	912,626	6.0	192,977	5.2	719,649	6.3
650.00–699.90	882,285	5.8	192,067	5.2	690,218	6.1
700.00–749.90	873,318	5.8	189,363	5.1	683,955	6.0
750.00–799.90	788,266	5.2	178,985	4.8	609,281	5.3
800.00–849.90	744,179	4.9	175,864	4.7	568,315	5.0
850.00–899.90	691,431	4.6	169,996	4.6	521,435	4.6
900.00–949.90	653,506	4.3	168,545	4.5	484,961	4.3
950.00–999.90	595,613	3.9	159,870	4.3	435,743	3.8
1,000.00–1,049.90	546,623	3.6	150,924	4.1	395,699	3.5
1,050.00–1,099.90	503,730	3.3	142,498	3.8	361,232	3.2
1,100.00–1,149.90	446,943	3.0	128,896	3.5	318,047	2.8
1,150.00–1,199.90	407,137	2.7	119,376	3.2	287,761	2.5
1,200.00–1,249.90	357,916	2.4	105,851	2.9	252,065	2.2
1,250.00–1,299.90	316,843	2.1	96,151	2.6	220,692	1.9
1,300.00–1,349.90	282,657	1.9	88,123	2.4	194,534	1.7
1,350.00–1,399.90	245,023	1.6	80,116	2.2	164,907	1.4
1,400.00–1,449.90	221,147	1.5	75,391	2.0	145,756	1.3
1,450.00–1,499.90	217,245	1.4	78,328	2.1	138,917	1.2
1,500.00–1,549.90	173,342	1.1	63,499	1.7	109,843	1.0
1,550.00–1,599.90	135,539	0.9	50,427	1.4	85,112	0.7
1,600.00–1,649.90	113,742	0.8	41,508	1.1	72,234	0.6
1,650.00–1,699.90	98,979	0.7	34,509	0.9	64,470	0.6
1,700.00–1,749.90	101,834	0.7	28,641	0.8	73,193	0.6
1,750.00–1,799.90	77,476	0.5	21,535	0.6	55,941	0.5
1,800.00–1,849.90	56,945	0.4	16,510	0.4	40,435	0.4
1,850.00–1,899.90	41,146	0.3	12,948	0.3	28,198	0.2
1,900.00 or more	70,689	0.5	30,280	0.8	40,409	0.4
Average primary insurance amount (dollars)	821.40		893.60		797.90	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

Totals do not necessarily equal the sum of rounded components.

CONTACT: Hazel P. Jenkins (410) 965-0164.



5.B OASDI Current-Pay Benefits: Retired Workers

**Table 5.B8—Number and average monthly benefit with and without reduction for early retirement, by sex, December 1956–2006, selected years**

Year	All retired workers				Men				Women			
	Total	Without reduction for early retirement	With reduction for early retirement	Early retirees as a percentage of total	Subtotal	Without reduction for early retirement	With reduction for early retirement	Early retirees as a percentage of subtotal	Subtotal	Without reduction for early retirement	With reduction for early retirement	Early retirees as a percentage of subtotal
<i>Number</i>												
1956	5,112,430	4,997,401	115,029	2.2	3,572,271	3,572,271	...	...	1,540,159	1,425,130	115,029	7.5
1960	8,061,469	7,112,265	949,204	11.8	5,216,668	5,216,668	...	...	2,844,801	1,895,597	949,204	33.4
1965	11,100,584	7,581,386	3,519,198	31.7	6,825,078	5,389,166	1,435,912	21.0	4,275,506	2,192,220	2,083,286	48.7
1970	13,349,175	7,282,295	6,066,880	45.4	7,688,460	4,930,400	2,758,060	35.9	5,660,715	2,351,895	3,308,820	58.5
1980	19,562,085	7,397,198	12,164,887	62.2	10,460,735	4,586,539	5,874,196	54.8	9,101,350	2,810,659	6,290,691	69.1
1985	22,431,930	7,720,959	14,710,971	65.6	11,816,956	4,655,477	7,161,479	60.6	10,614,974	3,065,482	7,549,492	71.1
1990	24,838,100	7,840,239	16,997,861	68.4	12,983,832	4,592,911	8,390,921	64.6	11,854,268	3,247,328	8,606,940	72.6
1995	26,672,806	7,941,363	18,731,443	70.2	13,913,531	4,559,535	9,353,996	67.2	12,759,275	3,381,828	9,377,447	73.5
1996	26,898,072	7,784,078	19,113,994	71.1	14,010,875	4,478,565	9,532,310	68.0	12,887,197	3,305,513	9,581,684	74.4
1997	27,274,572	7,673,286	19,601,286	71.9	14,116,818	4,371,503	9,745,315	69.0	13,157,754	3,301,783	9,855,971	74.9
1998	27,510,535	7,699,664	19,810,871	72.0	14,200,826	4,371,895	9,828,931	69.2	13,309,709	3,327,769	9,981,940	75.0
1999	27,774,677	7,739,557	20,035,120	72.1	14,321,468	4,385,921	9,935,547	69.4	13,453,209	3,353,636	10,099,573	75.1
2000	28,498,945	8,179,425	20,319,520	71.3	14,767,170	4,690,652	10,076,518	68.2	13,731,775	3,488,773	10,243,002	74.6
2001	28,836,774	8,262,843	20,573,931	71.3	14,930,081	4,719,500	10,210,581	68.4	13,906,693	3,543,340	10,363,350	74.5
2002	29,190,137	8,306,422	20,883,715	71.5	15,100,473	4,736,285	10,364,188	68.8	14,089,664	3,570,137	10,519,527	74.7
2003	29,531,611	8,292,022	21,239,589	71.9	15,247,841	4,705,215	10,542,626	69.1	14,283,770	3,586,807	10,696,963	74.9
2004	29,952,465	8,316,408	21,636,057	72.2	15,430,360	4,680,802	10,749,558	69.7	14,522,105	3,635,606	10,886,499	75.0
2005	30,460,836	8,331,737	22,129,099	72.6	15,650,611	4,668,990	10,981,621	70.2	14,810,225	3,662,747	11,147,478	75.3
2006	30,976,143	8,378,799	22,597,344	73.0	15,869,182	4,672,739	11,196,443	70.6	15,106,961	3,706,060	11,400,901	75.5
<i>Average monthly benefit (dollars)</i>												
1956	63.10	63.40	48.20	...	68.20	68.20	...	...	51.20	51.40	48.20	...
1960	74.00	76.50	55.80	...	81.90	81.90	...	...	59.70	61.60	55.80	...
1965	83.90	90.10	70.60	...	92.60	96.10	79.40	...	70.10	75.40	64.50	...
1970	118.10	130.20	103.60	...	130.50	139.10	115.30	...	101.20	111.70	93.80	...
1980	341.40	391.80	310.70	...	380.20	419.60	349.50	...	296.80	346.50	274.60	...
1985	478.60	581.20	424.80	...	538.40	627.50	480.50	...	412.10	511.00	372.00	...
1990	602.60	742.80	537.90	...	679.30	803.60	611.20	...	518.60	656.80	466.40	...
1995	719.80	885.60	649.50	...	810.20	963.70	735.40	...	621.20	780.40	563.80	...
1996	745.00	908.70	678.30	...	838.10	997.80	763.10	...	643.70	788.00	593.90	...
1997	765.00	915.90	705.90	...	860.50	1,025.10	786.60	...	662.50	771.30	626.10	...
1998	779.70	932.50	720.30	...	876.90	1,044.50	802.40	...	675.90	785.40	639.50	...
1999	804.30	959.20	744.40	...	904.60	1,075.30	829.30	...	697.50	807.50	661.00	...
2000	844.50	1,008.40	778.50	...	951.10	1,131.10	867.20	...	729.90	843.40	691.20	...
2001	874.40	1,038.70	808.50	...	984.60	1,166.00	900.70	...	756.20	869.20	717.60	...
2002	895.00	1,058.90	829.80	...	1,007.80	1,188.50	925.20	...	774.10	886.90	735.80	...
2003	922.10	1,086.80	857.80	...	1,038.70	1,220.60	957.50	...	797.60	911.30	759.50	...
2004	954.90	1,121.00	891.10	...	1,076.10	1,261.50	995.40	...	826.10	940.10	788.00	...
2005	1,002.00	1,174.80	936.90	...	1,129.50	1,322.70	1,047.40	...	867.30	986.40	828.20	...
2006	1,044.40	1,222.90	978.20	...	1,177.50	1,377.20	1,094.10	...	904.60	1,028.50	864.40	...

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

... = not applicable.

CONTACT: Alberta Presberry (410) 966-8473.

## 5.B OASDI Current-Pay Benefits: Retired Workers

**Table 5.B9—Number and percentage distribution, by sex, monthly benefit, and age, December 2006**

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)	30,976	2,840	8,099	6,834	5,582	4,121	2,343	1,157
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00	5.3	7.8	5.4	5.4	4.9	4.5	4.4	4.0
400.00–449.90	1.5	1.6	1.2	1.5	1.6	1.7	1.6	1.3
450.00–499.90	2.2	3.3	1.8	2.2	2.3	2.3	2.0	1.7
500.00–549.90	3.0	4.1	2.5	2.9	3.2	3.5	2.6	2.0
550.00–599.90	3.9	4.6	3.4	4.2	4.6	3.8	3.1	2.5
600.00–649.90	4.2	5.2	4.2	4.9	4.2	3.4	3.0	2.5
650.00–699.90	4.0	6.0	4.4	4.0	3.7	3.3	3.0	2.7
700.00–749.90	3.9	5.9	4.2	3.8	3.6	3.3	3.0	2.9
750.00–799.90	3.7	4.6	3.9	3.8	3.5	3.2	3.0	3.0
800.00–849.90	3.5	3.6	3.6	3.6	3.4	3.2	3.3	3.4
850.00–899.90	3.5	3.3	3.5	3.6	3.4	3.4	3.6	4.1
900.00–949.90	3.6	3.2	3.4	3.5	3.6	3.8	4.4	5.1
950.00–999.90	3.7	3.1	3.3	3.5	3.7	4.2	5.2	5.6
1,000.00–1,049.90	4.0	3.0	3.2	3.6	4.0	4.8	6.6	5.6
1,050.00–1,099.90	4.3	3.0	3.1	3.7	4.3	6.2	7.4	5.6
1,100.00–1,149.90	4.3	2.9	3.1	3.8	4.6	7.0	5.6	5.3
1,150.00–1,199.90	4.8	2.8	3.1	4.5	6.9	6.8	5.0	5.1
1,200.00–1,249.90	4.7	2.8	3.1	5.8	6.8	4.8	4.6	4.3
1,250.00–1,299.90	4.2	3.5	3.3	5.6	4.5	3.7	4.0	3.6
1,300.00–1,349.90	4.0	5.2	4.2	4.5	3.2	3.5	4.1	3.1
1,350.00–1,399.90	3.7	5.1	4.5	3.1	2.9	3.4	3.8	2.6
1,400.00–1,449.90	3.4	4.6	4.2	2.6	2.8	3.2	3.3	2.6
1,450.00–1,499.90	3.2	4.2	3.8	2.7	2.8	2.8	2.9	2.8
1,500.00–1,549.90	2.6	3.4	3.1	2.6	2.3	2.1	2.0	2.8
1,550.00–1,599.90	2.0	1.6	2.4	2.2	1.8	1.7	1.5	2.6
1,600.00–1,649.90	1.6	0.6	2.1	1.8	1.5	1.2	1.2	2.2
1,650.00–1,699.90	1.3	0.4	2.0	1.4	1.0	0.9	1.0	1.8
1,700.00 or more	6.0	0.5	10.0	5.3	5.0	4.3	4.9	9.2
Average benefit (dollars)	1,044.40	937.70	1,092.30	1,030.40	1,031.50	1,034.20	1,056.00	1,129.50
<i>Men</i>								
Total								
Number (thousands)	15,869	1,424	4,357	3,678	2,944	2,028	1,038	400
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00	4.7	6.4	4.7	4.9	4.3	3.9	4.4	3.7
400.00–449.90	1.0	1.0	0.8	1.0	1.1	1.3	1.3	1.2
450.00–499.90	1.3	1.8	1.1	1.3	1.4	1.5	1.5	1.5
500.00–549.90	1.6	2.2	1.4	1.5	1.6	1.7	1.7	1.6
550.00–599.90	1.8	2.2	1.5	1.7	1.8	1.9	1.9	1.9
600.00–649.90	1.9	2.2	1.7	1.8	1.9	1.9	1.9	1.8
650.00–699.90	2.0	2.3	1.8	2.0	2.0	2.0	2.0	1.9
700.00–749.90	2.1	2.4	1.9	2.1	2.2	2.2	2.2	2.1
750.00–799.90	2.2	2.5	2.0	2.3	2.4	2.3	2.4	2.2
800.00–849.90	2.4	2.6	2.1	2.5	2.6	2.6	2.7	2.5
850.00–899.90	2.7	2.7	2.3	2.7	2.8	2.9	3.1	3.2
900.00–949.90	3.0	2.9	2.4	3.0	3.2	3.4	4.0	3.9
950.00–999.90	3.4	3.1	2.6	3.3	3.6	3.9	5.2	4.4
1,000.00–1,049.90	3.9	3.2	2.8	3.6	4.0	4.8	8.1	4.5
1,050.00–1,099.90	4.5	3.4	3.0	3.9	4.6	7.0	9.0	4.6
1,100.00–1,149.90	4.7	3.5	3.1	4.2	5.2	8.7	5.7	4.5
1,150.00–1,199.90	5.8	3.6	3.3	5.5	9.2	8.8	5.1	4.7
1,200.00–1,249.90	5.9	3.7	3.5	7.7	9.3	5.6	4.7	4.2

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B9—Number and percentage distribution, by sex, monthly benefit, and age, December 2006—Continued

Monthly benefit (dollars)	Total, 62 or older	62–64	65–69	70–74	75–79	80–84	85–89	90 or older
<b>Men (cont.)</b>								
1,250.00–1,299.90	5.3	5.0	4.0	7.9	5.7	4.1	4.5	3.7
1,300.00–1,349.90	5.3	8.0	5.6	6.3	3.9	3.9	4.8	3.3
1,350.00–1,399.90	5.0	8.3	6.4	4.2	3.5	4.0	4.7	2.9
1,400.00–1,449.90	4.7	7.8	6.2	3.4	3.5	4.0	4.1	3.0
1,450.00–1,499.90	4.5	7.4	5.7	3.6	3.7	3.6	3.5	3.5
1,500.00–1,549.90	3.8	6.2	4.6	3.6	3.1	2.9	2.1	3.7
1,550.00–1,599.90	2.9	2.9	3.6	3.1	2.5	2.3	1.5	3.8
1,600.00–1,649.90	2.3	1.0	3.1	2.6	2.1	1.6	1.1	3.5
1,650.00–1,699.90	1.9	0.6	3.0	2.2	1.5	1.2	1.0	2.9
1,700.00 or more	9.3	0.9	16.1	8.3	7.4	6.0	5.9	15.3
Average benefit (dollars)	1,177.50	1,108.00	1,263.30	1,164.70	1,149.60	1,125.20	1,108.90	1,255.10
<b>Women</b>								
Total								
Number (thousands)	15,107	1,416	3,742	3,155	2,638	2,093	1,306	757
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00	5.9	9.2	6.2	5.9	5.5	4.9	4.5	4.1
400.00–449.90	2.0	2.3	1.6	2.0	2.2	2.2	1.8	1.4
450.00–499.90	3.1	4.8	2.7	3.2	3.3	3.1	2.4	1.8
500.00–549.90	4.5	6.0	3.9	4.5	5.0	5.1	3.4	2.3
550.00–599.90	6.1	7.0	5.5	7.2	7.7	5.6	4.0	2.8
600.00–649.90	6.6	8.3	7.1	8.4	6.8	4.8	3.8	2.9
650.00–699.90	6.2	9.7	7.4	6.5	5.5	4.6	3.7	3.1
700.00–749.90	5.8	9.4	6.9	5.9	5.2	4.3	3.6	3.3
750.00–799.90	5.1	6.7	6.1	5.5	4.7	4.0	3.5	3.5
800.00–849.90	4.6	4.6	5.4	5.0	4.3	3.8	3.7	3.8
850.00–899.90	4.3	4.0	4.9	4.5	4.0	3.9	4.0	4.6
900.00–949.90	4.3	3.5	4.5	4.2	3.9	4.2	4.7	5.7
950.00–999.90	4.1	3.1	4.1	3.8	3.9	4.5	5.1	6.2
1,000.00–1,049.90	4.1	2.8	3.7	3.6	3.9	4.8	5.5	6.2
1,050.00–1,099.90	4.1	2.5	3.4	3.4	4.0	5.5	6.2	6.1
1,100.00–1,149.90	3.9	2.3	3.1	3.3	4.0	5.4	5.4	5.8
1,150.00–1,199.90	3.8	2.1	2.9	3.4	4.4	4.8	5.0	5.3
1,200.00–1,249.90	3.5	1.9	2.7	3.5	4.0	4.1	4.5	4.4
1,250.00–1,299.90	2.9	2.0	2.6	2.9	3.1	3.3	3.7	3.6
1,300.00–1,349.90	2.7	2.4	2.6	2.3	2.5	3.1	3.4	3.0
1,350.00–1,399.90	2.3	1.8	2.3	1.9	2.2	2.8	3.0	2.5
1,400.00–1,449.90	2.0	1.3	1.9	1.7	2.1	2.4	2.7	2.3
1,450.00–1,499.90	1.8	0.9	1.6	1.6	1.8	2.0	2.5	2.4
1,500.00–1,549.90	1.4	0.6	1.3	1.4	1.4	1.4	1.9	2.3
1,550.00–1,599.90	1.1	0.3	1.1	1.1	1.0	1.1	1.5	1.9
1,600.00–1,649.90	0.9	0.2	1.0	0.8	0.7	0.8	1.2	1.6
1,650.00–1,699.90	0.7	0.1	0.9	0.6	0.5	0.6	1.0	1.2
1,700.00 or more	2.5	0.1	2.9	1.8	2.3	2.7	4.1	5.9
Average benefit (dollars)	904.60	766.40	893.00	873.90	899.60	946.10	1,014.00	1,063.10

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.

## 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 2006**

Primary insurance amount (dollars)	Retired workers		Wives and husbands		Children	
	Number	Percent	Number	Percent	Number	Percent
Total	30,976,143	100.0	2,478,599	100.0	489,940	100.0
Less than 300.00	1,470,511	4.8	64,929	2.6	9,796	2.0
300.00–349.90	548,231	1.8	20,479	0.8	4,244	0.9
350.00–399.90	685,177	2.2	23,230	0.9	5,131	1.1
400.00–449.90	552,306	1.8	20,509	0.8	4,841	1.0
450.00–499.90	602,914	2.0	22,138	0.9	5,108	1.0
500.00–549.90	902,429	2.9	33,239	1.3	7,468	1.5
550.00–599.90	1,044,454	3.4	38,809	1.6	9,349	1.9
600.00–649.90	1,155,699	3.7	41,682	1.7	13,064	2.7
650.00–699.90	1,135,040	3.7	41,253	1.7	13,851	2.8
700.00–749.90	1,138,987	3.7	41,574	1.7	13,990	2.9
750.00–799.90	1,056,253	3.4	41,034	1.7	13,852	2.8
800.00–849.90	1,027,173	3.3	42,287	1.7	14,323	2.9
850.00–899.90	991,310	3.2	44,037	1.8	14,707	3.0
900.00–949.90	980,749	3.2	47,815	1.9	14,894	3.0
950.00–999.90	945,153	3.1	50,401	2.0	14,876	3.0
1,000.00–1,049.90	927,788	3.0	53,235	2.2	15,338	3.1
1,050.00–1,099.90	924,999	3.0	58,520	2.4	15,662	3.2
1,100.00–1,149.90	903,838	2.9	62,902	2.5	16,054	3.3
1,150.00–1,199.90	918,719	3.0	70,176	2.8	16,263	3.3
1,200.00–1,249.90	917,866	3.0	77,208	3.1	16,355	3.3
1,250.00–1,299.90	959,706	3.1	91,338	3.7	17,252	3.5
1,300.00–1,349.90	1,039,849	3.4	116,508	4.7	18,342	3.7
1,350.00–1,399.90	1,043,437	3.4	127,598	5.2	18,263	3.7
1,400.00–1,449.90	1,101,939	3.6	147,493	6.0	19,071	3.9
1,450.00–1,499.90	1,293,462	4.2	187,595	7.6	21,840	4.5
1,500.00–1,549.90	1,150,679	3.7	174,145	7.0	20,384	4.2
1,550.00–1,599.90	949,821	3.1	144,596	5.8	17,796	3.6
1,600.00–1,649.90	790,710	2.6	116,385	4.7	15,667	3.2
1,650.00–1,699.90	677,695	2.2	92,110	3.7	14,907	3.0
1,700.00–1,749.90	669,895	2.2	80,230	3.2	16,633	3.4
1,750.00–1,799.90	561,430	1.8	64,049	2.6	14,611	3.0
1,800.00 or more	1,907,924	6.2	241,095	9.7	56,008	11.4
Average primary insurance amount (dollars)	1,072.20		1,301.40		1,231.60	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

Totals do not necessarily equal the sum of rounded components.

CONTACT: Alberta Presberry (410) 966-8473.

5.C OASDI Current-Pay Benefits: Retired Workers and Dependents

Table 5.C2—Average monthly benefit, by type of benefit and sex, December 1940–2006, selected years (in dollars)

Year	Retired workers			Wives			Husbands	Children			
	All	Men	Women	All	Entitled because of age <sup>a</sup>	Entitled because of children <sup>b</sup>		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 1940–2006, selected years (in dollars)—Continued**

Year	Retired workers			Wives			Husbands	Children			
	All	Men	Women	All	Entitled because of age <sup>a</sup>	Entitled because of children <sup>b</sup>		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

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.

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 2006

Year of entitlement	All disabled workers				Men				Women			
	Number	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)
Total	6,806,918	100.0	...	977.70	3,643,121	100.0	...	1,097.40	3,163,797	100.0	...	839.80
<i>Summary data</i>												
2000–2006	3,544,337	52.1	...	1,049.60	1,860,658	51.1	...	1,194.60	1,683,679	53.2	...	889.50
1995–1999	1,495,088	22.0	...	924.10	751,375	20.6	...	1,048.00	743,713	23.5	...	799.00
1990–1994	980,762	14.4	...	875.40	530,583	14.6	...	973.50	450,179	14.2	...	759.80
1985–1989	411,131	6.0	...	855.20	247,917	6.8	...	926.90	163,214	5.2	...	746.30
1980–1984	196,620	2.9	...	830.00	130,632	3.6	...	879.80	65,988	2.1	...	731.40
1975–1979	115,729	1.7	...	1,064.10	77,438	2.1	...	1,111.60	38,291	1.2	...	968.30
1970–1974	52,790	0.8	...	919.30	36,546	1.0	...	940.80	16,244	0.5	...	870.90
Before 1970	10,461	0.2	...	771.10	7,972	0.2	...	777.60	2,489	0.1	...	750.20
<i>Single-year data</i>												
2006	281,875	4.1	4.1	1,096.10	159,056	4.4	4.4	1,234.10	122,819	3.9	3.9	917.30
2005	481,039	7.1	11.2	1,077.80	260,916	7.2	11.5	1,220.50	220,123	7.0	10.8	908.60
2004	592,017	8.7	19.9	1,073.60	313,672	8.6	20.1	1,221.90	278,345	8.8	19.6	906.40
2003	627,338	9.2	29.1	1,066.70	329,034	9.0	29.2	1,217.60	298,304	9.4	29.1	900.20
2002	599,231	8.8	37.9	1,044.10	309,970	8.5	37.7	1,191.30	289,261	9.1	38.2	886.20
2001	523,891	7.7	45.6	1,007.90	267,649	7.3	45.0	1,145.90	256,242	8.1	46.3	863.80
2000	438,946	6.4	52.1	989.80	220,361	6.0	51.1	1,125.80	218,585	6.9	53.2	852.70
1999	378,396	5.6	57.6	959.90	189,454	5.2	56.3	1,091.70	188,942	6.0	59.2	827.70
1998	324,231	4.8	62.4	925.00	162,008	4.4	60.7	1,051.10	162,223	5.1	64.3	799.00
1997	287,598	4.2	66.6	909.10	144,266	4.0	64.7	1,030.00	143,332	4.5	68.8	787.30
1996	262,853	3.9	70.5	903.90	133,159	3.7	68.3	1,023.00	129,694	4.1	72.9	781.60
1995	242,010	3.6	74.0	907.10	122,488	3.4	71.7	1,024.90	119,522	3.8	76.7	786.30
1994	227,970	3.3	77.4	901.30	116,863	3.2	74.9	1,014.70	111,107	3.5	80.2	782.00
1993	214,836	3.2	80.5	876.80	113,753	3.1	78.0	983.40	101,083	3.2	83.4	756.70
1992	202,710	3.0	83.5	864.90	110,752	3.0	81.1	961.80	91,958	2.9	86.3	748.30
1991	185,696	2.7	86.2	860.80	104,079	2.9	83.9	949.20	81,617	2.6	88.9	748.10
1990	149,550	2.2	88.4	866.30	85,136	2.3	86.3	948.40	64,414	2.0	91.0	757.70
1989	111,471	1.6	90.1	870.00	64,844	1.8	88.0	949.50	46,627	1.5	92.4	759.40
1988	89,800	1.3	91.4	869.50	53,023	1.5	89.5	948.00	36,777	1.2	93.6	756.40
1987	76,577	1.1	92.5	862.80	46,328	1.3	90.8	936.70	30,249	1.0	94.5	749.50
1986	70,384	1.0	93.6	836.80	43,786	1.2	92.0	901.90	26,598	0.8	95.4	729.70
1985	62,899	0.9	94.5	820.00	39,936	1.1	93.1	878.40	22,963	0.7	96.1	718.50
1984	55,172	0.8	95.3	808.80	35,798	1.0	94.0	861.50	19,374	0.6	96.7	711.50
1983	44,830	0.7	96.0	808.70	29,780	0.8	94.9	859.30	15,050	0.5	97.2	708.40
1982	36,227	0.5	96.5	814.70	24,327	0.7	95.5	863.40	11,900	0.4	97.6	715.00
1981	30,583	0.4	96.9	846.80	20,537	0.6	96.1	893.70	10,046	0.3	97.9	750.90
1980	29,808	0.4	97.4	902.50	20,190	0.6	96.7	947.90	9,618	0.3	98.2	807.20
1979	26,576	0.4	97.8	1,043.70	17,720	0.5	97.1	1,097.70	8,856	0.3	98.5	935.50
1978	23,654	0.3	98.1	1,129.50	15,661	0.4	97.6	1,182.20	7,993	0.3	98.7	1,026.30
1977	22,839	0.3	98.4	1,092.10	15,344	0.4	98.0	1,137.90	7,495	0.2	99.0	998.20
1976	22,392	0.3	98.8	1,047.40	15,006	0.4	98.4	1,094.30	7,386	0.2	99.2	952.10
1975	20,268	0.3	99.1	1,001.70	13,707	0.4	98.8	1,038.10	6,561	0.2	99.4	925.60

(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 2006—Continued**

Year of entitlement	All disabled workers				Men				Women			
	Number	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)	Number	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)
<i>Single-year data (cont.)</i>												
1974	17,293	0.3	99.3	954.60	11,616	0.3	99.1	984.30	5,677	0.2	99.6	893.70
1973	13,831	0.2	99.5	922.70	9,357	0.3	99.4	943.90	4,474	0.1	99.7	878.60
1972	8,494	0.1	99.7	914.90	5,952	0.2	99.5	936.30	2,542	0.1	99.8	865.00
1971	7,355	0.1	99.8	895.20	5,323	0.1	99.7	911.80	2,032	0.1	99.9	851.90
1970	5,817	0.1	99.8	843.20	4,298	0.1	99.8	859.00	1,519	<sup>b</sup>	99.9	798.70
1969	4,488	0.1	99.9	804.00	3,443	0.1	99.9	813.00	1,045	<sup>b</sup>	100.0	774.40
1968	4,983	0.1	100.0	733.20	3,767	0.1	100.0	738.20	1,216	<sup>b</sup>	100.0	717.70
1967	579	<sup>b</sup>	100.0	804.00	441	<sup>b</sup>	100.0	804.90	138	<sup>b</sup>	100.0	801.00
1966	258	<sup>b</sup>	100.0	855.00	199	<sup>b</sup>	100.0	846.50	59	<sup>b</sup>	100.0	883.90
1965	116	<sup>b</sup>	100.0	796.60	89	<sup>b</sup>	100.0	813.10	27	<sup>b</sup>	100.0	742.20

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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: Shirley Turpin (410) 965-0181.



## 5.D OASDI Current-Pay Benefits: Disabled Workers

**Table 5.D2—Number and percentage distribution, by monthly benefit and sex, December 2006**

Monthly benefit (dollars)	Total		Men		Women	
	Number	Percent	Number	Percent	Number	Percent
All disabled workers	6,806,918	100.0	3,643,121	100.0	3,163,797	100.0
Less than 300.00	180,032	2.6	56,576	1.6	123,456	3.9
300.00–349.90	95,751	1.4	30,540	0.8	65,211	2.1
350.00–399.90	115,855	1.7	38,807	1.1	77,048	2.4
400.00–449.90	121,669	1.8	40,483	1.1	81,186	2.6
450.00–499.90	136,632	2.0	47,548	1.3	89,084	2.8
500.00–549.90	214,639	3.2	77,656	2.1	136,983	4.3
550.00–599.90	291,269	4.3	109,269	3.0	182,000	5.8
600.00–649.90	384,795	5.7	146,799	4.0	237,996	7.5
650.00–699.90	399,291	5.9	160,603	4.4	238,688	7.5
700.00–749.90	389,512	5.7	165,633	4.5	223,879	7.1
750.00–799.90	372,336	5.5	167,332	4.6	205,004	6.5
800.00–849.90	352,912	5.2	166,511	4.6	186,401	5.9
850.00–899.90	328,998	4.8	161,593	4.4	167,405	5.3
900.00–949.90	309,562	4.5	159,057	4.4	150,505	4.8
950.00–999.90	285,742	4.2	152,258	4.2	133,484	4.2
1,000.00–1,049.90	265,637	3.9	147,290	4.0	118,347	3.7
1,050.00–1,099.90	245,397	3.6	141,848	3.9	103,549	3.3
1,100.00–1,149.90	224,700	3.3	134,929	3.7	89,771	2.8
1,150.00–1,199.90	206,465	3.0	128,502	3.5	77,963	2.5
1,200.00–1,249.90	188,137	2.8	121,540	3.3	66,597	2.1
1,250.00–1,299.90	171,946	2.5	114,625	3.1	57,321	1.8
1,300.00–1,349.90	158,591	2.3	108,792	3.0	49,799	1.6
1,350.00–1,399.90	146,386	2.2	103,048	2.8	43,338	1.4
1,400.00–1,449.90	140,181	2.1	101,091	2.8	39,090	1.2
1,450.00–1,499.90	147,110	2.2	108,924	3.0	38,186	1.2
1,500.00–1,549.90	133,616	2.0	101,385	2.8	32,231	1.0
1,550.00–1,599.90	117,513	1.7	90,545	2.5	26,968	0.9
1,600.00–1,649.90	107,150	1.6	83,861	2.3	23,289	0.7
1,650.00–1,699.90	102,240	1.5	80,908	2.2	21,332	0.7
1,700.00–1,749.90	111,376	1.6	88,916	2.4	22,460	0.7
1,750.00–1,799.90	91,572	1.3	74,623	2.0	16,949	0.5
1,800.00 or more	269,906	4.0	231,629	6.4	38,277	1.2
Average benefit (dollars)	977.70		1,097.40		839.80	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Angela Y. Harper (410) 966-9541.

## 5.D OASDI Current-Pay Benefits: Disabled Workers

**Table 5.D3—Number and total monthly benefits, by sex, December 1957–2006, 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

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Hazel P. Jenkins (410) 965-0164.

## 5.D OASDI Current-Pay Benefits: Disabled Workers

**Table 5.D4—Number, average age, and percentage distribution, by sex and age, December 1957–2006, 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

(Continued)

## 5.D OASDI Current-Pay Benefits: Disabled Workers

**Table 5.D4—Number, average age, and percentage distribution, by sex and age, December 1957–2006, 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
1982	858	53.9	100.0	3.3	8.5	5.1	7.2	13.7	25.2	37.0
1983	838	53.6	100.0	3.5	9.3	5.7	7.5	12.9	24.3	36.8
1984	849	53.2	100.0	3.7	10.2	6.3	7.8	12.8	23.2	36.0
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

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: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

FRA = full retirement age.

... = not applicable.

CONTACT: Hazel P. Jenkins (410) 965-0164.

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 2006

Primary insurance amount (dollars)	Disabled workers		Spouses		Children	
	Number	Percent	Number	Percent	Number	Percent
Total	6,806,918	100.0	153,470	100.0	1,651,728	100.0
Less than 300.00	183,854	2.7	68	a	397	a
300.00–349.90	98,793	1.5	46	a	313	a
350.00–399.90	122,435	1.8	117	0.1	996	0.1
400.00–449.90	122,495	1.8	70	0.1	583	a
450.00–499.90	136,528	2.0	86	0.1	986	0.1
500.00–549.90	216,217	3.2	605	0.4	10,325	0.6
550.00–599.90	291,486	4.3	2,173	1.4	44,950	2.7
600.00–649.90	384,055	5.6	3,803	2.5	87,673	5.3
650.00–699.90	397,251	5.8	5,440	3.5	125,961	7.6
700.00–749.90	384,645	5.7	6,111	4.0	125,621	7.6
750.00–799.90	367,078	5.4	6,481	4.2	120,445	7.3
800.00–849.90	347,673	5.1	6,668	4.3	112,637	6.8
850.00–899.90	324,506	4.8	6,577	4.3	104,232	6.3
900.00–949.90	306,051	4.5	6,414	4.2	98,274	6.0
950.00–999.90	281,569	4.1	6,095	4.0	88,533	5.0
1,000.00–1,049.90	262,499	3.9	5,957	3.9	80,078	4.9
1,050.00–1,099.90	243,671	3.6	5,731	3.7	72,277	4.4
1,100.00–1,149.90	223,302	3.3	5,463	3.6	65,068	3.9
1,150.00–1,199.90	206,173	3.0	5,373	3.5	58,407	3.5
1,200.00–1,249.90	188,481	2.8	5,038	3.3	51,724	3.1
1,250.00–1,299.90	172,745	2.5	4,825	3.1	46,284	2.8
1,300.00–1,349.90	159,677	2.4	4,895	3.2	40,713	2.5
1,350.00–1,399.90	147,748	2.2	4,800	3.1	36,850	2.2
1,400.00–1,449.90	141,437	2.1	5,038	3.3	33,475	2.0
1,450.00–1,499.90	148,613	2.2	5,719	3.7	33,979	2.1
1,500.00–1,549.90	135,267	2.0	5,684	3.7	30,137	1.8
1,550.00–1,599.90	118,508	1.7	5,406	3.5	26,139	1.6
1,600.00–1,649.90	107,834	1.6	5,227	3.4	23,678	1.4
1,650.00–1,699.90	103,059	1.5	5,383	3.5	22,892	1.4
1,700.00–1,749.90	113,899	1.7	5,806	3.8	24,707	1.5
1,750.00–1,799.90	93,616	1.4	5,104	3.3	20,091	1.2
1,800.00 or more	275,753	4.1	17,267	11.3	63,303	3.8
Average primary insurance amount (dollars)	979.20		1,258.70		1,035.10	

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: Hazel P. Jenkins (410) 965-0164.

## 5.E OASDI Current-Pay Benefits: Disabled Workers and Dependents

**Table 5.E2—Average monthly benefit, by type of benefit, sex, and age, December 1957–2006, 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

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: ... = not applicable.

CONTACT: Hazel P. Jenkins (410) 965-0164.

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 1950–2006, selected years

Year	Total		Wives entitled solely because of age <sup>a</sup>		Wives entitled because of children <sup>b</sup>						Husbands	
					Subtotal		With at least 1 child under age 16 <sup>c</sup>		With at least 1 disabled child <sup>d</sup>			
	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

(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 1950–2006, selected years—Continued**

Year	Total		Wives entitled solely because of age <sup>a</sup>		Wives entitled because of children <sup>b</sup>						Husbands	
					Subtotal		With at least 1 child under age 16 <sup>c</sup>		With at least 1 disabled child <sup>d</sup>			
	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)
<b>Wives and husbands of disabled workers</b>												
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

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.
- 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 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.



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 2006**

Monthly benefit (dollars)	Total, 62 or older	62–64	65–69	70–74	75–79	80–84	85 or older
<b>Total</b>							
Number	2,459,373	274,271	651,922	597,788	497,837	302,256	135,299
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 150.00	5.4	11.5	6.5	4.7	3.5	3.4	2.7
150.00–174.90	1.4	2.2	1.6	1.3	1.0	0.9	1.1
175.00–199.90	1.5	2.4	1.7	1.3	1.2	1.3	1.2
200.00–224.90	1.9	2.7	2.1	1.8	1.6	1.5	1.3
225.00–249.90	2.0	3.0	2.2	1.9	1.7	1.7	1.6
250.00–274.90	2.2	2.9	2.4	2.1	2.0	2.0	1.8
275.00–299.90	2.2	2.8	2.4	2.2	2.0	2.0	1.8
300.00–324.90	2.3	2.7	2.5	2.3	2.1	2.1	2.0
325.00–349.90	2.4	2.7	2.5	2.3	2.2	2.2	2.2
350.00–374.90	2.5	2.8	2.5	2.5	2.5	2.6	2.4
375.00–399.90	2.7	2.8	2.6	2.7	2.7	2.8	2.7
400.00–424.90	2.9	2.9	2.7	2.9	3.0	3.1	3.3
425.00–449.90	3.2	2.9	2.9	3.2	3.4	3.7	3.9
450.00–474.90	3.6	3.0	3.1	3.5	3.9	4.7	4.7
475.00–499.90	4.5	3.2	3.3	4.0	4.9	7.4	6.5
500.00–524.90	5.3	3.5	3.6	4.5	6.5	10.1	6.3
525.00–549.90	6.2	3.8	4.4	5.9	8.9	8.6	6.2
550.00–574.90	7.5	4.0	5.7	9.1	10.8	6.3	6.6
575.00–599.90	6.6	4.5	6.1	9.0	7.5	4.1	4.6
600.00–624.90	5.3	5.6	6.0	6.6	3.9	3.5	4.3
625.00–649.90	4.2	5.9	5.3	3.8	3.0	3.2	4.2
650.00–674.90	3.6	5.6	4.5	2.7	2.7	3.0	4.2
675.00–699.90	3.3	5.5	3.9	2.3	2.5	2.9	4.1
700.00–724.90	3.0	4.9	3.2	2.2	2.4	3.0	3.9
725.00–749.90	2.6	2.7	2.5	2.2	2.5	3.2	3.4
750.00–774.90	2.1	1.2	2.1	2.1	2.2	2.7	2.2
775.00–799.90	1.8	0.7	1.8	1.9	1.9	2.2	1.6
800.00–824.90	1.6	0.5	1.7	1.7	1.9	1.5	1.4
825.00–849.90	1.3	0.4	1.5	1.6	1.5	0.9	1.0
850.00 or more	4.8	0.6	6.6	5.7	4.0	3.5	6.7
Average benefit (dollars)	517.50	455.10	520.80	524.90	525.60	522.50	553.70

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

CONTACT: Angela Y. Harper (410) 966-9541.

## 5.F OASDI Current-Pay Benefits: Dependents and Survivors

**Table 5.F4—Number of children and total monthly benefits, by type of benefit, December 1940–2006, 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
<b>Total</b>								
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
<b>Children under age 18</b>								
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
<b>Disabled adult children</b>								
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

(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 1940–2006, 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

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: . . . = not applicable.

CONTACT: Karyn Foley (410) 965-9047.

## 5.F OASDI Current-Pay Benefits: Dependents and Survivors

**Table 5.F6—Average monthly benefit for survivors, by type of benefit, December 1940–2006, 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	<sup>a</sup> 165.70	<sup>a</sup> 161.50	<sup>a</sup> 163.60	<sup>a</sup> 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 1940–2006, 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

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: . . . = not applicable.

a. Children's data estimated for 1977.

CONTACT: Karyn Foley (410) 965-9047.

## 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 2006**

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	171,453	100.0	4,279,305	100.0	1,889	100.0	214,315	100.0	1,898,862	100.0
Less than 300.00	2,770	1.6	34,094	0.8	10	0.5	1,921	0.9	67,432	3.6
300.00–349.90	1,191	0.7	13,467	0.3	4	0.2	996	0.5	26,398	1.4
350.00–399.90	1,431	0.8	62,877	1.5	18	1.0	1,614	0.8	51,461	2.7
400.00–449.90	1,496	0.9	30,643	0.7	7	0.4	1,463	0.7	34,910	1.8
450.00–499.90	1,611	0.9	37,158	0.9	6	0.3	1,688	0.8	35,808	1.9
500.00–549.90	2,306	1.3	56,139	1.3	20	1.1	2,477	1.2	51,072	2.7
550.00–599.90	3,442	2.0	71,519	1.7	55	2.9	3,691	1.7	67,115	3.5
600.00–649.90	4,977	2.9	77,187	1.8	71	3.8	4,984	2.3	88,794	4.7
650.00–699.90	5,786	3.4	86,927	2.0	83	4.4	5,917	2.8	94,015	5.0
700.00–749.90	6,119	3.6	89,081	2.1	79	4.2	6,105	2.8	91,107	4.8
750.00–799.90	6,215	3.6	90,795	2.1	89	4.7	6,646	3.1	87,893	4.6
800.00–849.90	6,444	3.8	99,399	2.3	99	5.2	7,042	3.3	86,962	4.6
850.00–899.90	6,746	3.9	113,396	2.6	89	4.7	7,470	3.5	86,247	4.5
900.00–949.90	7,024	4.1	145,407	3.4	92	4.9	8,144	3.8	88,608	4.7
950.00–999.90	7,076	4.1	165,260	3.9	94	5.0	8,239	3.8	84,340	4.4
1,000.00–1,049.90	7,242	4.2	173,922	4.1	81	4.3	8,756	4.1	78,345	4.1
1,050.00–1,099.90	7,037	4.1	193,244	4.5	104	5.5	9,028	4.2	74,289	3.9
1,100.00–1,149.90	6,815	4.0	203,880	4.8	76	4.0	8,967	4.2	67,986	3.6
1,150.00–1,199.90	6,742	3.9	221,408	5.2	84	4.4	9,326	4.4	64,678	3.4
1,200.00–1,249.90	6,326	3.7	207,363	4.8	82	4.3	9,004	4.2	58,340	3.1
1,250.00–1,299.90	6,077	3.5	235,448	5.5	59	3.1	9,202	4.3	55,496	2.9
1,300.00–1,349.90	5,757	3.4	272,671	6.4	74	3.9	9,229	4.3	52,971	2.8
1,350.00–1,399.90	5,254	3.1	264,443	6.2	60	3.2	8,815	4.1	47,521	2.5
1,400.00–1,449.90	5,000	2.9	267,460	6.3	50	2.6	8,601	4.0	44,063	2.3
1,450.00–1,499.90	5,384	3.1	284,236	6.6	63	3.3	9,484	4.4	44,955	2.4
1,500.00–1,549.90	4,868	2.8	200,806	4.7	52	2.8	8,610	4.0	37,508	2.0
1,550.00–1,599.90	4,449	2.6	141,186	3.3	53	2.8	7,422	3.5	31,191	1.6
1,600.00–1,649.90	4,100	2.4	98,909	2.3	28	1.5	6,642	3.1	27,237	1.4
1,650.00–1,699.90	3,974	2.3	74,708	1.7	35	1.9	6,362	3.0	25,093	1.3
1,700.00 or more	27,794	16.2	266,272	6.2	172	9.1	26,470	12.4	147,027	7.7

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.

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 1950–2006

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 1950–2006—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

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: . . . = not applicable.

CONTACT: Karyn Foley (410) 965-9047.



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 2006**

Year	Number	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)
Total	4,273,442	100.0	...	1,007.80
2005–2006	514,926	12.0	...	1,069.50
2000–2004	1,147,513	26.9	...	1,069.40
1995–1999	855,705	20.0	...	1,040.30
1990–1994	698,553	16.3	...	999.90
1985–1989	541,226	12.7	...	938.40
1980–1984	333,395	7.8	...	871.80
1975–1979	129,329	3.0	...	795.40
1970–1974	44,021	1.0	...	737.60
1968–1969	5,261	0.1	...	727.10
Before 1968	3,513	0.1	...	722.60
2006	253,060	5.9	5.9	1,065.70
2005	261,866	6.1	12.0	1,073.10
2004	253,675	5.9	18.0	1,076.10
2003	247,851	5.8	23.8	1,074.10
2002	231,795	5.4	29.2	1,068.50
2001	213,991	5.0	34.2	1,062.80
2000	200,201	4.7	38.9	1,063.00
1999	190,433	4.5	43.4	1,054.70
1998	179,261	4.2	47.6	1,044.80
1997	169,327	4.0	51.5	1,036.00
1996	161,171	3.8	55.3	1,033.80
1995	155,513	3.6	58.9	1,028.70
1994	150,506	3.5	62.4	1,020.30
1993	144,856	3.4	65.8	1,012.40
1992	140,602	3.3	69.1	1,000.60
1991	133,956	3.1	72.3	986.80
1990	128,633	3.0	75.3	974.80
1989	120,248	2.8	78.1	963.10
1988	115,401	2.7	80.8	949.00
1987	109,045	2.6	83.3	937.60
1986	102,543	2.4	85.7	922.80
1985	93,989	2.2	87.9	911.70
1984	84,703	2.0	89.9	894.50
1983	77,077	1.8	91.7	879.50
1982	65,834	1.5	93.3	872.30
1981	58,025	1.4	94.6	854.60
1980	47,756	1.1	95.7	839.00
1979	38,101	0.9	96.6	822.40
1978	30,413	0.7	97.3	808.50
1977	22,693	0.5	97.9	792.30
1976	21,115	0.5	98.4	766.80
1975	17,007	0.4	98.8	751.20
1974	14,003	0.3	99.1	745.60
1973	10,950	0.3	99.3	738.20
1972	8,367	0.2	99.5	729.40
1971	6,128	0.1	99.7	733.90
1970	4,573	0.1	99.8	731.60
1969	3,125	0.1	99.9	729.20
1968	2,136	<sup>b</sup>	99.9	724.00

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Represents those entitled in specified year or later.

b. Less than 0.05 percent.

CONTACT: Karyn Foley (410) 965-9047.

**Table 5.F10—Number, percentage, and average monthly benefit, by year of entitlement as disabled widow(er), December 2006**

Year	Number	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)
Total	220,178	100.0	...	630.70
2005–2006	36,195	16.4	...	615.10
2000–2004	113,355	51.5	...	643.90
1995–1999	57,359	26.1	...	616.00
1991–1994	13,269	6.0	...	623.70
2006	14,514	6.6	6.6	602.00
2005	21,681	9.8	16.4	623.80
2004	23,308	10.6	27.0	641.10
2003	23,950	10.9	37.9	646.00
2002	24,024	10.9	48.8	651.40
2001	22,579	10.3	59.1	639.60
2000	19,494	8.9	67.9	640.20
1999	16,596	7.5	75.5	629.40
1998	13,624	6.2	81.6	618.10
1997	11,383	5.2	86.8	606.20
1996	8,877	4.0	90.8	606.20
1995	6,879	3.1	94.0	608.50
1994	5,663	2.6	96.5	620.00
1993	4,158	1.9	98.4	625.80
1992	2,897	1.3	99.7	629.20
1991	551	0.3	100.0	616.60

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.

## 5.F OASDI Current-Pay Benefits: Dependents and Survivors

**Table 5.F11—Percentage distribution of nondisabled widows, by monthly benefit and age, December 2006**

Monthly benefit (dollars)	Total, 60 or older	60–61	62–64	65–69	70–74	75–79	80–84	85–89	90 or older
<b>Total</b>									
Number	4,231,310	112,335	304,057	602,065	604,146	767,613	819,838	617,256	404,000
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 300.00	2.2	2.7	3.3	2.7	2.5	2.4	2.2	1.3	0.4
300.00–349.90	1.2	0.9	0.9	0.9	1.0	1.1	1.3	1.6	2.1
350.00–399.90	1.5	1.1	1.1	1.2	1.3	1.3	1.5	1.7	2.5
400.00–449.90	1.7	1.7	1.4	1.6	1.7	1.7	1.8	1.7	1.7
450.00–499.90	2.0	2.4	1.9	1.9	2.1	2.0	2.0	1.9	2.2
500.00–549.90	2.3	2.5	2.2	2.2	2.3	2.2	2.2	2.2	2.6
550.00–599.90	2.5	2.7	2.4	2.4	2.6	2.5	2.5	2.5	2.9
600.00–649.90	2.8	3.0	2.7	2.5	2.8	2.6	2.9	2.9	3.2
650.00–699.90	3.1	3.2	2.9	2.8	3.0	3.0	3.2	3.3	3.7
700.00–749.90	3.8	3.6	3.3	3.2	3.5	3.6	4.0	4.3	4.8
750.00–799.90	4.1	3.9	3.5	3.5	3.8	3.9	4.2	4.4	5.2
800.00–849.90	4.6	4.2	4.0	4.0	4.2	4.4	4.8	5.0	5.7
850.00–899.90	4.9	4.5	4.2	4.3	4.8	4.8	5.1	5.0	5.9
900.00–949.90	5.4	4.8	4.6	4.7	5.2	5.5	5.9	5.3	6.2
950.00–999.90	5.9	5.0	4.9	5.1	5.7	6.4	6.6	5.6	6.2
1,000.00–1,049.90	6.3	5.4	5.4	5.8	7.1	7.4	6.3	5.8	5.8
1,050.00–1,099.90	6.7	5.8	5.9	6.9	7.9	7.0	6.8	6.4	5.3
1,100.00–1,149.90	6.0	5.4	5.7	6.5	6.6	5.8	6.3	5.4	5.0
1,150.00–1,199.90	5.4	5.0	5.5	6.1	5.5	5.8	5.3	4.8	4.5
1,200.00–1,249.90	4.9	6.1	5.8	5.6	5.3	5.6	4.3	4.3	3.6
1,250.00–1,299.90	4.1	6.5	5.9	4.8	4.4	4.1	3.4	3.3	2.8
1,300.00–1,349.90	3.5	5.8	5.3	4.1	3.4	3.1	3.2	3.0	2.3
1,350.00–1,399.90	3.0	5.0	4.7	3.4	2.7	2.8	3.0	2.6	1.7
1,400.00–1,449.90	2.6	4.2	4.0	2.8	2.4	2.6	2.4	2.4	1.8
1,450.00–1,499.90	2.3	3.1	3.1	2.5	2.3	2.3	2.0	2.4	1.7
1,500.00–1,549.90	1.7	1.1	1.9	2.1	1.7	1.5	1.3	1.8	1.7
1,550.00–1,599.90	1.2	0.3	1.3	1.6	1.2	1.0	1.0	1.5	1.4
1,600.00–1,649.90	0.9	0.1	0.9	1.3	0.8	0.7	0.7	1.3	1.1
1,650.00–1,699.90	0.7	a	0.6	1.0	0.5	0.5	0.6	1.0	0.9
1,700.00–1,749.90	0.5	a	0.3	0.7	0.4	0.4	0.5	0.8	0.7
1,750.00–1,799.90	0.4	a	0.2	0.5	0.3	0.3	0.4	0.6	0.5
1,800.00–1,849.90	0.3	a	0.1	0.4	0.2	0.3	0.3	0.5	0.4
1,850.00–1,899.90	0.3	a	0.1	0.3	0.2	0.2	0.3	0.4	0.4
1,900.00 or more	1.4	a	0.1	0.6	0.8	1.1	1.5	2.8	3.1
Average benefit (dollars)	1,009.30	993.10	1,019.40	1,029.00	998.30	1,001.50	996.80	1,031.80	998.90

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: Hazel P. Jenkins (410) 965-0164.

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 1950–2006, selected years**

Year	Total		Widowed						Surviving divorced	
			Subtotal		With at least 1 child under age 16 <sup>a</sup>		Entitled solely because of at least 1 disabled child <sup>b</sup>			
	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	<sup>c</sup>
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
1961	428,138	25,425	427,699	25,395	420,258	24,938	7,441	457	439	30
1962	451,984	26,838	451,520	26,805	443,182	26,290	8,338	515	464	33
1963	461,675	27,438	461,211	27,405	452,106	26,830	9,105	575	464	32
1964	470,597	27,954	470,100	27,290	460,348	27,295	9,752	625	497	34
1965	471,816	30,882	471,286	30,842	461,011	30,132	10,275	710	530	40
1966	487,755	31,983	486,958	31,927	476,275	31,188	10,683	739	797	56
1967	496,307	32,686	495,308	32,616	483,808	31,791	11,500	825	999	71
1968	504,916	37,833	503,774	37,743	492,674	36,849	11,100	894	1,142	90
1969	511,639	38,406	510,355	38,305	499,324	37,402	11,031	902	1,284	101
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

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.

CONTACT: Karyn Foley (410) 965-9047.

## 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 2006**

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)		
All nondisabled widows aged 65 or older	3,814,918	1,009.00	1,776,956	1,111.20	851,368	1,249.50	925,588	983.90	<sup>a</sup> 2,037,962	919.80
65–69	602,065	1,029.00	85,268	1,193.40	57,983	1,259.50	27,285	1,052.90	516,797	1,001.90
65	132,384	985.40	3,930	1,151.30	3,146	1,177.40	784	1,046.50	128,454	980.40
66	119,045	1,063.50	14,677	1,276.00	11,145	1,331.70	3,532	1,100.30	104,368	1,033.60
67	117,138	1,053.30	20,206	1,226.70	14,356	1,290.50	5,850	1,070.10	96,932	1,017.20
68	117,750	1,032.50	22,122	1,176.80	14,563	1,241.40	7,559	1,052.30	95,628	999.10
69	115,748	1,015.10	24,333	1,137.70	14,773	1,210.20	9,560	1,025.80	91,415	982.40
70–74	604,146	998.30	194,953	1,108.20	103,955	1,194.40	90,998	1,009.70	409,193	946.00
70	111,082	1,001.50	27,660	1,110.90	15,716	1,185.20	11,944	1,013.20	83,422	965.20
71	116,801	995.70	33,477	1,106.50	18,504	1,185.20	14,973	1,009.30	83,324	951.20
72	122,955	1,000.50	39,674	1,113.10	21,597	1,198.60	18,077	1,010.90	83,281	946.80
73	121,408	997.50	43,228	1,109.00	22,725	1,199.80	20,503	1,008.30	78,180	935.80
74	131,900	996.80	50,914	1,103.30	25,413	1,198.40	25,501	1,008.60	80,986	929.80
75–79	767,613	1,001.50	353,425	1,103.10	166,789	1,216.50	186,636	1,001.80	414,188	914.80
75	137,919	1,002.20	57,025	1,107.80	27,875	1,212.70	29,150	1,007.50	80,894	927.70
76	151,271	1,005.00	66,084	1,109.30	31,731	1,216.90	34,353	1,010.00	85,187	924.00
77	152,982	1,004.20	70,314	1,104.20	33,196	1,216.10	37,118	1,004.10	82,668	919.20
78	159,038	999.90	77,006	1,099.00	35,908	1,215.90	41,098	996.90	82,032	906.80
79	166,403	996.80	82,996	1,097.80	38,079	1,219.80	44,917	994.40	83,407	896.40
80–84	819,838	996.80	457,111	1,096.20	205,863	1,240.20	251,248	978.20	362,727	871.40
80	166,130	993.90	86,540	1,095.40	39,983	1,224.20	46,557	984.80	79,590	883.60
81	164,920	995.30	89,280	1,093.60	40,033	1,231.00	49,247	982.00	75,640	879.20
82	168,655	992.80	94,184	1,090.70	42,364	1,232.60	51,820	974.70	74,471	869.00
83	162,349	998.00	93,519	1,097.40	41,729	1,249.40	51,790	975.00	68,830	862.90
84	157,784	1,004.30	93,588	1,103.70	41,754	1,262.80	51,834	975.60	64,196	859.40
85–89	617,256	1,031.80	395,588	1,137.40	177,288	1,317.90	218,300	990.90	221,668	843.40
85	156,616	1,015.60	95,594	1,118.20	42,655	1,287.00	52,939	982.20	61,022	854.90
86	142,613	1,026.90	89,222	1,132.10	40,045	1,307.90	49,177	988.90	53,391	851.20
87	118,061	1,033.00	75,688	1,140.10	33,899	1,320.70	41,789	993.70	42,373	841.70
88	107,549	1,045.40	71,754	1,151.50	31,947	1,343.90	39,807	997.10	35,795	832.80
89	92,417	1,049.50	63,330	1,154.70	28,742	1,345.40	34,588	996.30	29,087	820.40
90 or older	404,000	998.90	290,611	1,086.70	139,490	1,252.90	151,121	933.30	113,389	774.10

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

a. Includes 148,348 widows with benefits also limited due to early retirement of spouse.

CONTACT: Diane Wallace (410) 965-0165.

**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 without and with reduction for early retirement, by sex and primary insurance amount, December 2006**

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	6,347,442	100.0	1,145,623	100.0	5,201,819	100.0
Less than 250.00	467,711	7.4	75,413	6.6	392,298	7.5
250.00–299.90	329,904	5.2	49,503	4.3	280,401	5.4
300.00–349.90	319,937	5.0	48,367	4.2	271,570	5.2
350.00–399.90	409,092	6.4	65,695	5.7	343,397	6.6
400.00–449.90	315,148	5.0	51,847	4.5	263,301	5.1
450.00–499.90	339,547	5.3	56,581	4.9	282,966	5.4
500.00–549.90	505,951	8.0	92,766	8.1	413,185	7.9
550.00–599.90	558,589	8.8	105,713	9.2	452,876	8.7
600.00–649.90	561,556	8.8	100,802	8.8	460,754	8.9
650.00–699.90	494,609	7.8	90,995	7.9	403,614	7.8
700.00–749.90	429,920	6.8	78,595	6.9	351,325	6.8
750.00–799.90	321,783	5.1	61,493	5.4	260,290	5.0
800.00–849.90	256,608	4.0	51,031	4.5	205,577	4.1
850.00–899.90	204,721	3.2	41,551	3.6	163,170	3.1
900.00–949.90	170,516	2.7	35,984	3.1	134,532	2.6
950.00–999.90	135,795	2.1	29,403	2.6	106,392	2.0
1,000.00–1,049.90	110,948	1.7	23,651	2.1	87,297	1.7
1,050.00–1,099.90	93,867	1.5	19,673	1.7	74,194	1.4
1,100.00–1,149.90	74,390	1.2	14,971	1.3	59,419	1.1
1,150.00–1,199.90	61,054	1.1	11,932	1.1	49,122	0.9
1,200.00 or more	185,796	2.9	39,657	3.5	146,139	2.8
Men	130,487	100.0	35,715	100.0	94,772	100.0
Less than 250.00	6,460	5.0	3,226	9.0	3,234	3.4
250.00–299.90	3,875	3.0	1,791	5.0	2,084	2.2
300.00–349.90	3,659	2.8	1,515	4.2	2,144	2.3
350.00–399.90	4,419	3.4	1,779	5.0	2,640	2.8
400.00–449.90	3,492	2.7	1,384	3.9	2,108	2.2
450.00–499.90	3,658	2.8	1,438	4.0	2,220	2.3
500.00–549.90	5,540	4.2	2,128	6.1	3,412	3.6
550.00–599.90	6,611	5.1	2,544	7.1	4,067	4.3
600.00–649.90	6,913	5.3	2,473	6.9	4,440	4.7
650.00–699.90	6,875	5.3	2,368	6.6	4,507	4.8
700.00–749.90	6,771	5.1	2,071	5.8	4,700	5.0
750.00–799.90	6,043	4.6	1,702	4.8	4,341	4.6
800.00–849.90	5,474	4.2	1,375	3.8	4,099	4.3
850.00–899.90	5,092	3.9	1,179	3.3	3,913	4.1
900.00–949.90	4,812	3.7	983	2.8	3,829	4.0
950.00–999.90	4,606	3.5	861	2.4	3,745	4.0
1,000.00–1,049.90	4,515	3.4	737	2.1	3,778	4.0
1,050.00–1,099.90	4,665	3.6	748	2.1	3,917	4.1
1,100.00–1,149.90	4,581	3.5	686	1.9	3,895	4.1
1,150.00–1,199.90	4,558	3.5	692	1.9	3,866	4.1
1,200.00 or more	27,868	21.4	4,035	11.3	23,833	25.1
Women	6,216,955	100.0	1,109,908	100.0	5,107,047	100.0
Less than 250.00	461,251	7.4	72,187	6.5	389,064	7.6
250.00–299.90	326,029	5.2	47,712	4.3	278,317	5.4
300.00–349.90	316,278	5.1	46,852	4.2	269,426	5.3
350.00–399.90	404,673	6.5	63,916	5.8	340,757	6.7
400.00–449.90	311,656	5.0	50,463	4.5	261,193	5.1
450.00–499.90	335,889	5.4	55,143	5.0	280,746	5.5
500.00–549.90	500,411	8.1	90,638	8.2	409,773	8.1
550.00–599.90	551,978	8.9	103,169	9.2	448,809	8.8
600.00–649.90	554,643	8.9	98,329	8.9	456,314	8.9
650.00–699.90	487,734	7.8	88,627	8.0	399,107	7.8
700.00–749.90	423,149	6.8	76,524	6.9	346,625	6.8

(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 without and with reduction for early retirement, by sex and primary insurance amount, December 2006—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 (cont.)						
750.00–799.90	315,740	5.1	59,791	5.4	255,949	5.0
800.00–849.90	251,134	4.1	49,656	4.5	201,478	3.9
850.00–899.90	199,629	3.2	40,372	3.6	159,257	3.1
900.00–949.90	165,704	2.7	35,001	3.1	130,703	2.6
950.00–999.90	131,189	2.2	28,542	2.6	102,647	2.0
1,000.00–1,049.90	106,433	1.7	22,914	2.1	83,519	1.6
1,050.00–1,099.90	89,202	1.4	18,925	1.7	70,277	1.4
1,100.00–1,149.90	69,809	1.1	14,285	1.3	55,524	1.1
1,150.00–1,199.90	56,496	0.9	11,240	1.0	45,256	0.9
1,200.00 or more	157,928	2.5	35,622	3.2	122,306	2.4

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

CONTACT: Diane Wallace (410) 965-0165.

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 1952–2006

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	<sup>a</sup> 282,940	<sup>a</sup> 10.3	<sup>a</sup> 324,930	<sup>a</sup> 12.3	<sup>a</sup> 3,740	<sup>a</sup> 7,120	<sup>a</sup> 4,110	<sup>a</sup> 1,910	<sup>a</sup> 1,100
1966	706,860	699,080	15.1	<sup>a</sup> 315,550	<sup>a</sup> 11.2	<sup>a</sup> 379,440	<sup>a</sup> 13.2	<sup>a</sup> 4,090	<sup>a</sup> 7,780	<sup>a</sup> 4,470	<sup>a</sup> 2,260	<sup>a</sup> 1,050
1967	770,190	760,950	15.7	<sup>a</sup> 334,200	<sup>a</sup> 11.8	<sup>a</sup> 422,480	<sup>a</sup> 13.8	<sup>a</sup> 4,270	<sup>a</sup> 9,240	<sup>a</sup> 5,190	<sup>a</sup> 3,070	<sup>a</sup> 980
1968	842,560	831,760	16.3	<sup>a</sup> 354,750	<sup>a</sup> 12.4	<sup>a</sup> 472,590	<sup>a</sup> 14.5	<sup>a</sup> 4,420	<sup>a</sup> 10,800	<sup>a</sup> 5,810	<sup>a</sup> 4,110	<sup>a</sup> 880
1969	920,250	909,720	17.0	<sup>a</sup> 376,520	<sup>a</sup> 13.0	<sup>a</sup> 528,660	<sup>a</sup> 15.3	<sup>a</sup> 4,540	<sup>a</sup> 10,530	<sup>a</sup> 5,620	<sup>a</sup> 4,160	<sup>a</sup> 750
1970	977,340	966,780	17.1	<sup>a</sup> 388,210	<sup>a</sup> 13.3	<sup>a</sup> 573,950	<sup>a</sup> 15.9	<sup>a</sup> 4,620	<sup>a</sup> 10,560	<sup>a</sup> 5,530	<sup>a</sup> 4,400	<sup>a</sup> 630
1971	1,069,940	1,060,120	17.7	<sup>a</sup> 411,710	<sup>a</sup> 13.8	<sup>a</sup> 643,730	<sup>a</sup> 16.9	<sup>a</sup> 4,680	<sup>a</sup> 9,820	<sup>a</sup> 5,130	<sup>a</sup> 4,170	<sup>a</sup> 520
1972	1,183,369	1,170,286	18.5	<sup>a</sup> 477,333	<sup>a</sup> 15.5	<sup>a</sup> 688,087	<sup>a</sup> 17.3	<sup>a</sup> 4,866	<sup>a</sup> 13,083	<sup>a</sup> 6,797	<sup>a</sup> 5,442	<sup>a</sup> 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	<sup>a</sup> 554,844	<sup>a</sup> 17.1	<sup>a</sup> 956,662	<sup>a</sup> 21.4	<sup>a</sup> 4,820	<sup>a</sup> 18,257	<sup>a</sup> 6,592	<sup>a</sup> 11,080	<sup>a</sup> 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	<sup>a</sup> 669,792	<sup>a</sup> 19.5	<sup>a</sup> 1,137,251	<sup>a</sup> 23.4	<sup>a</sup> 4,965	<sup>a</sup> 15,920	<sup>a</sup> 7,497	<sup>a</sup> 7,779	<sup>a</sup> 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 1952–2006—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

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.



## 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 2006**

Type of secondary benefit	Number	Average monthly benefit (dollars)		
		Combined benefit	Retired-worker benefit	Reduced secondary benefit
All dually entitled retired workers	6,347,442	938.20	519.10	419.10
Wives and husbands	2,707,836	634.10	426.60	207.50
Wives of—	2,676,186	634.80	426.60	208.20
Retired workers	2,655,493	635.10	426.80	208.30
Disabled workers	20,693	591.70	394.80	196.90
Husbands of—	31,650	575.30	428.00	147.30
Retired workers	30,864	576.70	429.00	147.70
Disabled workers	786	521.00	391.50	129.50
Widow(er)s	3,639,157	1,164.50	587.90	576.60
Widows	3,540,363	1,166.60	581.40	585.20
Widowers	98,794	1,087.10	819.50	267.60
Parents	449	1,106.20	504.00	602.20

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

CONTACT: Diane Wallace (410) 965-0165.

**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 2006**

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	<sup>a</sup> 2,707,836	<sup>b</sup> 3,639,157	628.70	1,175.00	68	50
Less than 200.00	13,323	2,332	153.30	152.90	86	82
200.00–249.90	16,977	2,737	227.40	227.20	81	76
250.00–299.90	26,877	4,249	276.60	276.70	77	73
300.00–349.90	37,489	8,305	326.20	324.50	73	74
350.00–399.90	54,493	11,542	376.50	375.80	70	71
400.00–449.90	83,585	14,883	426.90	426.80	69	68
450.00–499.90	147,676	22,097	477.50	476.10	69	67
500.00–549.90	273,068	31,271	527.10	526.10	68	67
550.00–599.90	451,624	41,560	576.80	575.70	68	67
600.00–649.90	475,736	50,635	624.10	625.70	70	66
650.00–699.90	371,876	59,709	673.80	675.70	69	65
700.00–749.90	299,507	72,990	723.90	725.50	68	64
750.00–799.90	192,215	85,129	772.30	775.60	67	63
800.00–849.90	110,863	102,406	822.90	825.30	65	62
850.00–899.90	69,300	125,616	872.80	875.10	63	61
900.00–949.90	43,252	161,906	923.50	925.70	62	59
950.00–999.90	23,169	192,243	972.00	976.40	61	58
1,000.00–1,049.90	<sup>c</sup> 16,806	219,201	<sup>c</sup> 1,117.30	1,025.60	<sup>c</sup> 51	56
1,050.00–1,099.90	...	265,098	...	1,075.60	...	54
1,100.00–1,149.90	...	267,723	...	1,124.90	...	52
1,150.00–1,199.90	...	273,259	...	1,174.90	...	51
1,200.00–1,249.90	...	265,717	...	1,224.30	...	50
1,250.00–1,299.90	...	219,774	...	1,273.80	...	49
1,300.00–1,349.90	...	191,876	...	1,324.50	...	48
1,350.00–1,399.90	...	169,269	...	1,374.60	...	47
1,400.00–1,449.90	...	154,274	...	1,424.60	...	45
1,450.00–1,499.90	...	142,285	...	1,474.80	...	44
1,500.00 or more	...	481,071	...	1,731.00	...	40

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: ... = not applicable.

a. Includes 31,650 husbands.

b. Includes 98,794 widowers.

c. \$1,000 or more.

CONTACT: Diane Wallace (410) 965-0165.

## 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 2006**

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
<b><i>Dually entitled wives and husbands</i></b>														
All	<sup>a</sup> 2,707,836	100.0	9.3	8.1	8.4	8.1	7.9	10.1	13.0	12.0	9.3	6.1	3.6	4.1
Less than 200.00	13,323	100.0	100.0	...	...	...	...	...	...	...	...	...	...	...
200.00–249.90	16,977	100.0	51.7	48.3	...	...	...	...	...	...	...	...	...	...
250.00–299.90	26,877	100.0	38.4	27.7	33.9	...	...	...	...	...	...	...	...	...
300.00–349.90	37,489	100.0	29.0	23.0	22.8	25.2	...	...	...	...	...	...	...	...
350.00–399.90	54,493	100.0	23.2	18.7	20.3	19.0	18.8	...	...	...	...	...	...	...
400.00–449.90	83,585	100.0	18.6	16.1	16.9	16.3	15.7	16.4	...	...	...	...	...	...
450.00–499.90	147,676	100.0	14.7	12.9	13.1	12.6	12.8	17.7	16.2	...	...	...	...	...
500.00–549.90	273,068	100.0	12.5	11.2	10.6	9.9	10.2	15.2	18.5	11.9	...	...	...	...
550.00–599.90	451,624	100.0	9.3	8.4	8.9	8.7	8.8	13.6	17.4	16.0	8.9	...	...	...
600.00–649.90	475,736	100.0	5.9	6.0	6.9	7.3	7.6	11.2	16.5	16.7	14.9	7.0	...	...
650.00–699.90	371,876	100.0	5.4	5.5	6.2	6.4	6.7	8.3	13.7	15.1	14.2	12.6	5.9	...
700.00 or more	755,112	100.0	4.7	4.8	5.2	5.5	5.6	6.3	9.2	11.3	11.4	11.1	10.2	14.7
<b><i>Dually entitled widow(er)s</i></b>														
All	<sup>b</sup> 3,639,157	100.0	4.9	4.7	5.4	5.6	5.4	7.3	7.8	7.7	7.5	6.5	6.1	31.1
Less than 200.00	2,332	100.0	100.0	...	...	...	...	...	...	...	...	...	...	...
200.00–249.90	2,737	100.0	60.7	39.3	...	...	...	...	...	...	...	...	...	...
250.00–299.90	4,249	100.0	43.5	28.3	28.2	...	...	...	...	...	...	...	...	...
300.00–349.90	8,305	100.0	27.9	22.3	27.2	22.6	...	...	...	...	...	...	...	...
350.00–399.90	11,542	100.0	20.9	16.2	21.8	25.5	15.6	...	...	...	...	...	...	...
400.00–449.90	14,883	100.0	18.9	13.9	17.4	18.7	16.8	14.3	...	...	...	...	...	...
450.00–499.90	22,097	100.0	15.8	11.8	14.0	15.6	14.9	16.3	11.6	...	...	...	...	...
500.00–549.90	31,271	100.0	12.6	9.6	11.4	12.9	13.4	14.8	15.0	10.3	...	...	...	...
550.00–599.90	41,560	100.0	10.2	8.1	9.6	11.0	10.9	13.9	14.1	13.2	9.0	...	...	...
600.00–649.90	50,635	100.0	8.5	6.9	8.2	9.5	9.4	12.1	13.3	12.7	11.9	7.5	...	...
650.00–699.90	59,709	100.0	7.1	6.0	7.0	8.2	8.5	10.8	12.1	12.2	11.6	10.2	6.3	...
700.00–749.90	72,990	100.0	6.4	5.6	6.6	7.6	7.2	10.0	10.9	11.3	11.2	10.0	8.5	4.7
750.00–799.90	85,129	100.0	5.6	4.9	6.1	6.7	6.6	8.9	10.3	10.7	10.9	9.6	8.4	11.3
800.00–849.90	102,406	100.0	5.0	4.7	5.8	6.5	6.3	8.3	9.5	9.8	10.1	9.2	8.3	16.5
850.00–899.90	125,616	100.0	4.3	4.3	5.2	6.2	5.9	7.9	8.8	9.2	9.4	8.8	8.4	21.6
900.00–949.90	161,906	100.0	4.0	4.0	5.1	6.0	5.7	7.6	8.2	8.6	8.7	8.3	7.8	26.0
950.00–999.90	192,243	100.0	3.9	3.9	4.8	5.7	5.4	7.3	8.1	7.9	8.1	7.7	7.5	29.7
1,000.00–1,049.90	219,201	100.0	4.1	4.2	4.9	5.5	5.2	7.1	7.8	7.7	7.7	7.3	6.9	31.6
1,050.00–1,099.90	265,098	100.0	4.7	4.7	5.0	5.3	5.2	7.2	7.6	7.4	7.4	6.9	6.6	32.0
1,100.00–1,149.90	267,723	100.0	4.6	4.6	4.9	5.1	5.0	7.1	7.5	7.4	7.2	6.6	6.3	33.7
1,150.00–1,199.90	273,259	100.0	4.5	4.4	4.9	5.0	4.8	7.0	7.6	7.3	7.2	6.4	6.1	34.8
1,200.00–1,249.90	265,717	100.0	4.5	4.4	4.9	4.7	4.7	7.0	7.6	7.3	7.2	6.3	5.9	35.5
1,250.00–1,299.90	219,774	100.0	4.0	4.1	4.6	4.6	4.5	6.8	7.5	7.2	7.0	6.3	5.8	37.6
1,300.00–1,349.90	191,876	100.0	3.9	4.1	4.7	4.4	4.4	6.4	7.4	7.2	6.9	6.2	5.8	38.6
1,350.00–1,399.90	169,269	100.0	4.0	4.3	4.7	4.4	4.4	6.4	7.0	7.1	6.8	6.2	5.7	39.0
1,400.00–1,449.90	154,274	100.0	4.1	4.2	4.7	4.5	4.4	6.2	7.2	6.9	6.9	5.9	5.6	39.4
1,450.00–1,499.90	142,285	100.0	3.9	4.2	4.7	4.6	4.5	6.1	6.8	6.9	6.7	5.9	5.6	40.1
1,500.00 or more	481,071	100.0	3.4	3.9	4.8	4.9	4.8	5.8	6.6	6.6	6.4	5.7	5.2	41.9

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: ... = not applicable.

a. Includes 31,650 husbands.

b. Includes 98,794 widowers.

CONTACT: Diane Wallace (410) 965-0165.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H1—Number and average monthly family benefit for selected family groups, December 1945–2006, selected years

Year	Retired-worker families				Survivor families				Disabled-worker families					
	Worker only			Worker and wife <sup>a</sup>	Non-disabled widow only	Widowed mother or father and—			Worker only			Worker, wife, <sup>b</sup> and—		Worker and spouse
	All	Men	Women			1 child	2 children	3 or more children	All	Men	Women	1 child	2 or more children	
<b>Number (thousands)</b>														
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	53	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	36	47	71
<b>Average monthly family benefit (dollars)</b>														
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 1945–2006, selected years—Continued**

Year	Retired-worker families				Survivor families				Disabled-worker families					
	Worker only			Worker and wife <sup>a</sup>	Non-disabled widow only	Widowed mother or father and—			Worker only			Worker, wife, <sup>b</sup> 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	1,722.20	1,599.90	1,743.80

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. Data for 2006 are based on 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.

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 2006**

Family group	Number <sup>a</sup> (thousands)		Average primary insurance amount (dollars)	Average monthly family benefit (dollars)
	Families	Beneficiaries		
<b>Retired-worker families</b>				
Worker only	28,198	28,198	1,050.60	1,031.30
Men	13,174	13,174	1,311.60	1,174.70
Full benefit	3,785	3,785	1,333.30	1,374.40
Reduced benefit	9,390	9,390	1,302.90	1,094.20
Women	15,024	15,024	821.60	905.70
Full benefit	3,680	3,680	894.60	1,030.10
Reduced benefit	11,344	11,344	798.00	865.30
Worker and wife	2,324	4,648	1,313.40	1,726.10
Full worker benefit	780	1,560	1,346.60	1,967.10
Reduced worker benefit	1,544	3,089	1,296.60	1,604.40
Worker and husband	41	83	648.60	896.10
Worker and children	312	687	1,223.30	1,742.00
Male worker <sup>b</sup>	272	600	1,268.50	1,802.90
Female worker <sup>c</sup>	40	87	915.80	1,327.80
Worker, wife, and children	88	285	1,277.70	2,104.00
Worker, wife, and 1 child	72	215	1,295.30	2,112.40
Full worker benefit	21	64	1,301.30	2,301.20
Reduced worker benefit	50	151	1,292.70	2,031.90
Worker, wife, and 2 or more children	16	70	1,260.10	2,095.60
Full worker benefit	5	20	1,288.60	2,338.70
Reduced worker benefit	11	50	1,248.40	1,995.10
<b>Survivor families</b>				
Nondisabled widow(er) only	4,106	4,106	1,198.00	1,007.80
Full benefit	1,717	1,717	1,182.90	1,111.00
Reduced benefit	2,389	2,389	1,208.90	933.60
Nondisabled widow(er) and children	87	181	1,099.70	1,758.00
Full benefit	52	107	1,070.90	1,789.90
Reduced benefit	36	74	1,141.20	1,711.90
Disabled widow(er) only	200	200	1,205.40	631.40
Widowed mother or father and children	167	446	1,183.00	1,954.90
1 child	89	178	1,167.10	1,737.10
2 children	54	163	1,235.70	2,146.70
3 or more children	24	105	1,146.10	1,980.80
Children only	1,134	1,532	950.50	916.90
1 child	846	846	961.70	717.80
2 children	208	416	969.80	1,425.40
3 or more children	80	270	920.10	1,524.30
Parents	2	2	1,104.30	943.20
<b>Disabled-worker families</b>				
Worker only	5,703	5,703	961.80	961.10
Men	2,918	2,918	1,090.70	1,089.10
Women	2,784	2,784	826.60	827.00
Worker and spouse <sup>d</sup>	71	141	1,429.80	1,743.80
Worker and children	955	2,421	1,038.50	1,500.90
Male worker	579	1,477	1,105.60	1,613.00
Female worker	376	944	935.20	1,328.20
Worker, wife, and children	81	319	1,131.00	1,667.80
1 child	35	104	1,165.40	1,729.60
2 or more children	46	215	1,096.70	1,606.00
Worker, husband, and children	2	7	948.40	1,362.30

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. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).
- b. Includes 196,139 families with reduced retired-worker benefits.
- c. Includes 29,249 families with reduced retired-worker benefits.
- d. 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.

## 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 2006**

Monthly family benefit <sup>a</sup> (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	13,174,084	15,023,886	2,324,147	71,784	16,018	2,918,478	2,784,376	34,775	46,377
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 200.00	1.2	1.3	0.5	0.2	0.1	0.5	1.0	0.0	0.0
200.00–249.90	0.8	0.9	0.3	0.2	0.2	0.6	1.4	0.1	0.1
250.00–299.90	0.9	1.0	0.4	0.2	0.2	0.8	2.0	0.1	0.1
300.00–349.90	0.9	1.2	0.5	0.3	0.4	1.0	2.3	0.1	0.1
350.00–399.90	0.9	1.4	0.6	0.3	0.4	1.3	2.8	0.1	0.1
400.00–449.90	1.0	1.9	0.6	0.4	0.4	1.4	2.9	0.1	0.1
450.00–499.90	1.3	3.1	0.6	0.4	0.6	1.6	3.2	0.1	0.1
500.00–549.90	1.6	4.4	0.6	0.5	0.5	2.5	4.8	0.2	0.2
550.00–599.90	1.7	6.1	0.6	0.6	0.7	3.2	6.0	0.6	0.7
600.00–649.90	1.8	6.6	0.8	0.5	0.7	4.1	7.5	1.0	1.1
650.00–699.90	2.0	6.2	0.9	0.7	0.9	4.2	7.1	1.2	1.7
700.00–749.90	2.1	5.8	1.1	0.9	0.9	4.3	6.7	1.3	1.8
750.00–799.90	2.3	5.1	1.2	1.1	1.5	4.3	6.2	1.6	2.0
800.00–849.90	2.5	4.6	1.2	1.3	1.8	4.3	5.6	1.7	2.2
850.00–899.90	2.7	4.4	1.3	1.3	1.9	4.2	5.1	1.7	2.4
900.00–949.90	3.1	4.3	1.3	1.4	2.0	4.1	4.6	1.9	2.4
950.00–999.90	3.4	4.2	1.3	1.3	1.6	4.0	4.1	1.9	2.4
1,000.00–1,049.90	3.9	4.1	1.3	1.2	1.8	3.9	3.6	2.0	2.4
1,050.00–1,099.90	4.5	4.1	1.4	1.2	1.6	3.7	3.2	2.1	2.6
1,100.00–1,149.90	4.7	3.9	1.4	1.0	1.3	3.6	2.8	2.2	2.9
1,150.00–1,199.90	5.7	3.8	1.5	1.0	1.2	3.4	2.4	2.6	3.1
1,200.00–1,249.90	5.9	3.5	1.6	1.0	1.2	3.3	2.1	2.8	3.3
1,250.00–1,299.90	5.3	2.9	1.7	1.0	1.2	3.1	1.8	2.9	3.3
1,300.00–1,349.90	5.4	2.7	1.8	1.0	1.3	3.0	1.6	3.0	3.3
1,350.00–1,399.90	5.1	2.3	2.0	1.0	1.2	2.8	1.3	3.3	4.0
1,400.00–1,449.90	4.8	2.0	2.1	1.0	1.3	2.8	1.2	3.2	3.7
1,450.00–1,499.90	4.5	1.8	2.3	1.0	1.3	3.0	1.2	3.1	3.5
1,500.00–1,549.90	3.8	1.4	2.7	1.1	1.1	2.8	1.0	3.2	3.3
1,550.00–1,599.90	2.9	1.1	3.1	1.1	1.1	2.5	0.8	2.8	3.2
1,600.00–1,649.90	2.3	0.9	3.2	1.2	1.2	2.3	0.7	2.9	2.9
1,650.00–1,699.90	1.9	0.7	3.5	1.3	1.2	2.2	0.7	2.8	2.7
1,700.00–1,749.90	<sup>b</sup> 9.0	<sup>b</sup> 2.3	4.2	1.4	1.2	<sup>b</sup> 10.8	<sup>b</sup> 2.4	2.7	2.7
1,750.00–1,799.90	...	...	4.6	1.5	1.3	...	...	2.6	2.4
1,800.00–1,849.90	...	...	4.4	1.7	1.7	...	...	2.4	2.2
1,850.00–1,899.90	...	...	4.1	1.9	1.4	...	...	2.4	2.1
1,900.00–1,949.90	...	...	3.9	2.1	1.6	...	...	2.2	2.0
1,950.00–1,999.90	...	...	3.6	2.3	1.6	...	...	2.0	1.8
2,000.00–2,049.90	...	...	3.4	2.5	2.2	...	...	2.2	1.7
2,050.00–2,099.90	...	...	3.2	2.9	2.5	...	...	2.1	1.5
2,100.00–2,149.90	...	...	2.9	2.9	2.3	...	...	1.9	1.5
2,150.00–2,199.90	...	...	2.7	3.0	2.5	...	...	2.1	1.6
2,200.00–2,249.90	...	...	2.5	3.2	2.4	...	...	2.0	1.5

(Continued)

**Table 5.H3—Percentage distribution of retired-worker and disabled-worker families, by monthly benefit for selected family groups, December 2006—Continued**

Monthly family benefit <sup>a</sup> (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	...	...	2.2	3.2	2.3	...	...	2.2	1.4
2,300.00–2,349.90	...	...	1.9	3.4	2.4	...	...	1.9	1.2
2,350.00–2,399.90	...	...	1.6	3.2	2.4	...	...	1.7	1.3
2,400.00–2,449.90	...	...	1.4	3.0	2.1	...	...	1.7	1.2
2,450.00–2,499.90	...	...	1.2	2.8	2.1	...	...	1.6	1.2
2,500.00–2,549.90	...	...	1.1	2.8	1.9	...	...	1.4	1.1
2,550.00–2,599.90	...	...	1.0	2.6	2.0	...	...	1.6	1.2
2,600.00–2,649.90	...	...	0.9	2.6	2.3	...	...	1.5	1.2
2,650.00–2,699.90	...	...	0.8	2.5	2.1	...	...	1.4	1.0
2,700.00–2,749.90	...	...	0.7	2.3	2.0	...	...	1.2	1.0
2,750.00–2,799.90	...	...	0.7	2.1	2.1	...	...	1.0	0.7
2,800.00–2,849.90	...	...	0.6	1.9	2.1	...	...	1.0	0.6
2,850.00–2,899.90	...	...	0.5	1.8	1.8	...	...	0.8	0.6
2,900.00 or more	...	...	2.7	13.6	18.9	...	...	4.2	3.5
Average monthly family benefit (dollars)	1,174.70	905.70	1,726.10	2,112.40	2,095.60	1,089.10	827.00	1,729.60	1,606.00

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

- a. Cases involving actuarial reduction may be represented in all benefit intervals for which values are shown.
- b. \$1,700 or more.

CONTACT: Diane Wallace (410) 965-0165.

## 5.H OASDI Current-Pay Benefits: Beneficiary Families

**Table 5.H4—Percentage distribution of survivor families, by monthly benefit for selected family groups, December 2006**

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
<b>Total</b>								
Number	89,174	54,338	23,689	845,745	208,158	79,888	4,059,366	192,528
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	0.2	2.7	0.9	1.2	0.7	8.4
200.00–249.90	0.2	0.1	0.2	1.7	0.6	0.7	0.4	3.6
250.00–299.90	0.2	0.2	0.3	2.0	0.9	1.1	0.9	4.1
300.00–349.90	0.4	0.3	0.5	2.0	1.1	1.5	1.2	4.4
350.00–399.90	0.4	0.4	0.5	6.1	1.2	1.7	1.5	4.9
400.00–449.90	0.4	0.4	0.6	5.3	1.3	1.6	1.7	5.8
450.00–499.90	0.5	0.4	0.5	6.7	1.3	1.7	2.0	6.1
500.00–549.90	0.5	0.4	0.7	6.4	1.4	1.7	2.3	6.0
550.00–599.90	0.7	0.5	0.7	6.2	1.8	1.8	2.5	5.9
600.00–649.90	0.7	0.5	0.7	6.4	1.5	1.7	2.8	5.6
650.00–699.90	0.6	0.5	0.7	6.1	1.4	1.6	3.2	5.3
700.00–749.90	0.7	0.6	0.9	6.7	1.4	1.6	3.8	5.0
750.00–799.90	0.9	0.7	1.0	5.6	1.7	1.8	4.1	4.6
800.00–849.90	1.3	0.9	1.2	5.2	2.3	2.3	4.6	4.2
850.00–899.90	1.6	1.1	1.5	4.6	2.6	2.6	4.9	3.8
900.00–949.90	2.0	1.7	2.2	4.1	3.3	3.8	5.4	3.5
950.00–999.90	2.3	1.9	2.4	3.7	3.6	3.9	5.9	3.1
1,000.00–1,049.90	2.4	1.8	2.9	3.3	3.6	3.6	6.3	2.9
1,050.00–1,099.90	2.5	2.1	2.7	3.0	3.4	3.6	6.7	2.9
1,100.00–1,149.90	2.6	1.9	2.8	2.8	3.4	3.2	6.0	2.3
1,150.00–1,199.90	2.5	1.7	2.5	2.0	3.2	2.9	5.4	2.0
1,200.00–1,249.90	2.7	1.8	2.2	1.6	3.3	2.8	4.9	1.8
1,250.00–1,299.90	2.8	1.7	2.0	1.5	3.2	2.4	4.1	1.4
1,300.00–1,349.90	2.7	1.3	1.5	<sup>a</sup> 4.3	3.1	1.7	3.4	<sup>a</sup> 2.6
1,350.00–1,399.90	2.8	1.3	1.6	...	2.9	1.7	3.0	...
1,400.00–1,449.90	2.8	1.4	1.6	...	2.9	1.6	2.6	...
1,450.00–1,499.90	2.8	1.4	1.5	...	2.7	1.5	2.3	...
1,500.00–1,549.90	2.8	1.5	1.6	...	2.6	1.6	1.7	...
1,550.00–1,599.90	2.8	1.5	1.5	...	2.4	1.6	1.2	...
1,600.00–1,649.90	2.7	1.4	1.7	...	2.3	1.4	0.9	...
1,650.00–1,699.90	2.6	1.6	1.5	...	2.2	1.4	0.7	...
1,700.00–1,749.90	2.7	1.5	1.5	...	2.0	1.4	<sup>b</sup> 2.8	...
1,750.00–1,799.90	2.6	1.5	1.5	...	1.9	1.4	...	...
1,800.00–1,849.90	2.5	1.6	1.8	...	1.8	1.3	...	...
1,850.00–1,899.90	2.4	1.5	1.5	...	1.7	1.3	...	...
1,900.00–1,949.90	2.3	1.6	1.5	...	1.6	1.2	...	...
1,950.00–1,999.90	2.2	1.6	1.5	...	1.5	1.2	...	...
2,000.00–2,049.90	2.1	1.9	1.5	...	1.4	1.3	...	...
2,050.00–2,099.90	2.0	1.8	1.5	...	1.3	1.2	...	...
2,100.00–2,149.90	1.9	1.9	1.7	...	1.2	1.3	...	...
2,150.00–2,199.90	2.1	1.9	1.6	...	1.3	1.2	...	...
2,200.00–2,249.90	2.2	1.8	1.6	...	1.2	1.2	...	...

(Continued)



**Table 5.H4—Percentage distribution of survivor families, by monthly benefit for selected family groups, December 2006—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	2.0	1.9	1.6	...	1.2	1.2	...	...
2,300.00–2,349.90	1.8	2.2	1.9	...	1.1	1.3	...	...
2,350.00–2,399.90	1.7	2.5	2.1	...	1.0	1.4	...	...
2,400.00–2,449.90	1.6	2.4	2.1	...	1.0	1.4	...	...
2,450.00–2,499.90	1.6	2.3	1.9	...	0.9	1.3	...	...
2,500.00–2,549.90	1.5	2.1	1.8	...	0.9	1.2	...	...
2,550.00–2,599.90	1.9	2.3	1.8	...	1.1	1.1	...	...
2,600.00–2,649.90	1.7	2.1	1.8	...	0.9	1.1	...	...
2,650.00–2,699.90	1.4	1.8	1.5	...	0.8	0.9	...	...
2,700.00–2,749.90	1.3	1.8	1.5	...	0.7	0.9	...	...
2,750.00–2,799.90	1.2	1.8	1.3	...	0.7	0.8	...	...
2,800.00–2,849.90	1.0	1.6	1.2	...	0.6	0.7	...	...
2,850.00–2,899.90	0.8	1.5	1.0	...	0.5	0.6	...	...
2,900.00 or more	4.6	22.0	18.6	...	2.5	8.6	...	...
Average monthly family benefit (dollars)	1,737.10	2,146.70	1,980.80	717.80	1,425.40	1,524.30	1,007.80	631.40

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. \$1,300 or more.

b. \$1,700 or more.

CONTACT: Diane Wallace (410) 965-0165.

## 5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J1—Estimated total annual benefits paid, by state or other area and program, 2006  
(in millions of dollars)**

State or area	Total, OASDI	Retirement	Survivors	Disability
All areas <sup>a</sup>	552,636	366,952	93,300	92,384
Alabama	9,913	5,743	1,804	2,366
Alaska	715	454	125	136
Arizona	10,774	7,428	1,584	1,762
Arkansas	6,053	3,627	1,015	1,411
California	50,790	34,700	8,220	7,870
Colorado	6,685	4,562	1,107	1,016
Connecticut	7,266	5,249	1,064	952
Delaware	1,830	1,246	276	308
District of Columbia	709	469	121	120
Florida	38,876	27,627	5,717	5,532
Georgia	13,872	8,741	2,398	2,733
Hawaii	2,277	1,699	310	268
Idaho	2,563	1,737	413	412
Illinois	22,453	15,211	4,014	3,228
Indiana	12,752	8,501	2,226	2,024
Iowa	6,298	4,381	1,115	801
Kansas	5,261	3,621	906	733
Kentucky	8,654	4,807	1,612	2,235
Louisiana	7,618	4,247	1,805	1,566
Maine	2,879	1,829	445	604
Maryland	9,016	6,158	1,540	1,318
Massachusetts	12,239	8,247	1,851	2,141
Michigan	21,475	14,129	3,739	3,606
Minnesota	9,125	6,382	1,477	1,266
Mississippi	5,701	3,247	1,033	1,422
Missouri	11,973	7,723	2,025	2,225
Montana	1,871	1,266	326	279
Nebraska	3,277	2,270	571	435
Nevada	4,068	2,833	566	669
New Hampshire	2,647	1,800	365	482
New Jersey	17,267	12,277	2,619	2,371
New Mexico	3,332	2,146	564	622
New York	36,528	24,943	5,574	6,011
North Carolina	17,101	11,134	2,510	3,457
North Dakota	1,232	824	263	144
Ohio	22,638	14,802	4,501	3,335
Oklahoma	7,036	4,496	1,272	1,268
Oregon	7,231	5,045	1,125	1,062
Pennsylvania	28,490	19,183	5,061	4,247
Rhode Island	2,188	1,500	299	390
South Carolina	8,834	5,626	1,372	1,836
South Dakota	1,494	1,035	274	186
Tennessee	12,173	7,612	2,082	2,480
Texas	32,986	21,043	6,444	5,499
Utah	3,160	2,200	527	433
Vermont	1,274	865	195	213
Virginia	12,980	8,467	2,130	2,382
Washington	11,257	7,754	1,730	1,773
West Virginia	4,695	2,552	954	1,189
Wisconsin	11,237	7,853	1,820	1,564
Wyoming	939	649	157	133

(Continued)

**Table 5.J1—Estimated total annual benefits paid, by state or other area and program, 2006  
(in millions of dollars)—Continued**

State or area	Total, OASDI	Retirement	Survivors	Disability
Outlying areas				
American Samoa	37	14	11	12
Guam	93	55	22	15
Northern Mariana Islands	14	7	5	2
Puerto Rico	5,544	2,845	1,042	1,657
Virgin Islands	159	113	24	23
Foreign countries	3,061	1,961	945	155

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Unnegotiated checks not deducted. Excludes lump-sum death payments.

Totals do not necessarily equal the sum of rounded components.

a. Includes beneficiaries with unknown state code.

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## 5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J2—Number, by state or other area, program, and type of benefit, December 2006**

State or area	Total <sup>a</sup>	Retirement			Survivors		Disability		
		Retired workers	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
All areas <sup>b</sup>	49,122,624	30,976,143	2,478,599	489,940	4,666,962	1,898,862	6,806,918	153,470	1,651,728
Alabama	920,843	502,502	40,989	9,610	95,762	43,045	178,375	4,310	46,250
Alaska	66,906	40,237	2,675	1,279	5,103	4,684	10,211	229	2,488
Arizona	940,213	617,724	45,652	8,084	76,392	33,950	125,727	2,393	30,291
Arkansas	576,997	327,697	24,503	5,413	55,616	24,335	109,118	2,564	27,751
California	4,504,672	2,912,853	261,217	55,119	394,166	169,905	570,084	11,751	129,577
Colorado	600,316	392,178	33,512	4,855	54,252	21,800	75,836	1,241	16,642
Connecticut	587,292	408,611	22,305	5,519	46,686	19,501	67,281	908	16,481
Delaware	153,544	100,779	6,163	1,199	12,666	5,593	21,685	302	5,157
District of Columbia	71,231	45,919	1,998	813	6,211	4,374	10,233	47	1,636
Florida	3,444,546	2,349,812	162,857	32,039	286,449	106,833	407,268	8,006	91,282
Georgia	1,269,987	764,680	49,384	13,253	119,007	65,004	205,249	3,960	49,450
Hawaii	204,207	146,599	8,560	3,131	15,640	6,343	19,203	400	4,331
Idaho	233,766	150,186	12,866	2,153	20,360	8,288	31,318	773	7,822
Illinois	1,906,454	1,238,100	90,254	20,461	187,450	77,156	231,633	4,395	57,005
Indiana	1,080,547	683,997	50,160	9,046	104,580	43,353	148,690	2,985	37,736
Iowa	555,803	369,639	31,225	3,937	56,661	17,248	61,782	1,060	14,251
Kansas	454,919	299,083	22,291	3,545	43,692	16,622	55,542	903	13,241
Kentucky	812,644	424,678	42,307	6,785	90,047	33,343	167,356	5,719	42,409
Louisiana	722,643	371,872	50,038	8,580	97,808	41,739	114,609	4,794	33,203
Maine	275,175	167,240	12,547	2,095	23,709	8,158	48,022	932	12,472
Maryland	778,689	515,455	33,236	7,258	71,121	35,133	94,524	1,160	20,802
Massachusetts	1,072,305	695,199	42,601	9,415	88,505	33,620	158,781	2,161	42,023
Michigan	1,776,084	1,103,565	91,649	18,192	171,714	71,581	250,351	5,533	63,499
Minnesota	801,237	537,792	40,911	5,933	72,994	25,369	94,885	1,255	22,098
Mississippi	553,844	296,755	20,753	6,903	54,735	31,094	109,531	2,817	31,256
Missouri	1,077,060	663,590	47,895	8,747	101,208	42,845	168,301	3,197	41,277
Montana	172,920	111,990	9,628	1,710	16,752	6,278	21,611	510	4,441
Nebraska	293,935	194,402	15,815	2,258	28,898	9,742	33,915	526	8,378
Nevada	354,321	240,460	14,002	3,318	26,259	12,564	46,966	704	10,048
New Hampshire	226,313	148,322	8,086	1,535	16,603	6,705	34,310	489	10,263
New Jersey	1,381,151	948,401	53,813	13,289	117,395	47,676	158,619	3,013	38,945
New Mexico	319,935	192,565	18,966	3,521	29,785	14,417	48,044	1,363	11,274
New York	3,075,081	2,001,974	134,224	36,310	262,721	106,847	416,715	9,562	106,728
North Carolina	1,550,340	970,774	52,895	12,677	128,785	61,114	261,068	4,385	58,642
North Dakota	115,434	73,133	8,733	860	14,578	3,873	11,604	213	2,440
Ohio	1,976,174	1,220,222	122,211	17,210	226,863	74,755	251,748	5,459	57,706
Oklahoma	647,067	394,760	32,220	5,642	66,227	27,073	97,042	2,340	21,763
Oregon	630,822	424,170	31,607	5,515	55,384	18,993	78,860	1,679	14,614
Pennsylvania	2,438,397	1,571,817	120,091	19,845	250,688	81,844	309,778	7,140	77,194
Rhode Island	193,099	128,410	5,768	1,567	14,414	5,744	29,721	395	7,080
South Carolina	801,076	489,743	28,282	7,446	70,167	35,369	135,892	2,478	31,699
South Dakota	142,953	94,207	8,807	1,082	15,042	5,160	15,038	265	3,352
Tennessee	1,115,933	659,946	48,970	10,238	108,804	48,853	190,539	4,432	44,151
Texas	3,028,901	1,807,534	188,427	32,633	330,751	142,438	410,912	11,969	104,236
Utah	282,158	182,948	17,275	3,243	22,884	13,705	32,274	733	9,096
Vermont	114,559	73,887	5,086	1,105	9,867	3,597	16,663	268	4,086
Virginia	1,161,105	725,945	51,986	10,255	107,679	45,122	173,734	4,048	42,336
Washington	961,739	631,195	50,042	8,722	81,793	30,920	130,146	2,266	26,655
West Virginia	419,477	212,985	26,981	3,961	52,459	16,140	83,143	3,973	19,835
Wisconsin	966,818	649,341	44,255	8,127	87,487	31,872	116,190	1,883	27,663
Wyoming	82,748	55,007	4,247	615	7,576	3,080	9,918	215	2,090

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J2—Number, by state or other area, program, and type of benefit, December 2006—Continued

State or area	Total <sup>a</sup>	Retirement			Survivors		Disability		
		Retired workers	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
Outlying areas									
American Samoa	5,503	1,639	206	395	559	855	1,109	62	678
Guam	12,481	6,599	1,056	564	1,171	1,228	1,247	49	567
Northern Mariana Islands	2,306	941	132	263	292	397	196	6	79
Puerto Rico	723,203	344,564	56,568	14,148	80,944	36,861	139,966	8,545	41,607
Virgin Islands	16,673	10,948	893	467	1,242	953	1,621	70	479
Foreign countries	468,078	280,572	68,779	8,055	80,359	13,771	12,734	635	3,173

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

- a. Includes special age-72 beneficiaries.
- b. Includes beneficiaries with unknown state code.

CONTACT: Shirley Turpin (410) 965-0181.

## 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 2006**

State or area	Number			Total monthly benefits (thousands of dollars)		
	Total	Men	Women	Total	Men	Women
All areas <sup>a</sup>	34,468,217	14,650,230	19,817,987	34,971,214	17,295,378	17,675,836
Alabama	570,151	234,255	335,896	553,960	268,927	285,033
Alaska	41,785	20,415	21,370	41,120	22,955	18,166
Arizona	663,771	297,042	366,729	690,866	358,232	332,634
Arkansas	365,916	154,730	211,186	347,328	171,978	175,350
California	3,260,895	1,431,541	1,829,354	3,310,789	1,664,337	1,646,453
Colorado	433,502	190,459	243,043	433,583	223,344	210,239
Connecticut	442,308	183,317	258,991	497,462	239,931	257,532
Delaware	107,279	46,103	61,176	115,961	58,067	57,895
District of Columbia	50,909	20,497	30,412	45,461	20,477	24,984
Florida	2,539,329	1,115,243	1,424,086	2,586,336	1,312,725	1,273,611
Georgia	824,996	339,909	485,087	820,489	398,519	421,970
Hawaii	154,785	67,216	87,569	155,836	75,782	80,054
Idaho	163,276	73,814	89,462	162,808	86,266	76,542
Illinois	1,380,562	574,968	805,594	1,464,727	709,086	755,642
Indiana	751,918	311,239	440,679	805,717	392,139	413,579
Iowa	419,018	174,392	244,626	424,138	207,850	216,288
Kansas	334,495	140,018	194,477	349,388	171,342	178,046
Kentucky	497,917	208,525	289,392	472,587	233,234	239,353
Louisiana	464,667	195,926	268,741	433,227	218,818	214,410
Maine	184,890	79,627	105,263	174,970	88,283	86,687
Maryland	565,156	234,810	330,346	585,692	281,011	304,681
Massachusetts	772,136	317,977	454,159	798,135	383,667	414,469
Michigan	1,214,958	512,615	702,343	1,325,746	657,345	668,400
Minnesota	592,095	252,419	339,676	603,493	302,605	300,888
Mississippi	332,518	135,784	196,734	311,160	149,453	161,707
Missouri	733,704	307,953	425,751	738,033	362,857	375,176
Montana	123,594	55,549	68,045	120,213	62,703	57,510
Nebraska	220,420	91,991	128,429	220,977	108,317	112,660
Nevada	250,426	118,955	131,471	259,878	140,196	119,683
New Hampshire	156,927	67,967	88,960	166,368	84,402	81,966
New Jersey	1,030,597	423,629	606,968	1,163,408	554,087	609,320
New Mexico	215,973	96,158	119,815	203,415	105,296	98,118
New York	2,190,138	903,009	1,287,129	2,352,447	1,113,094	1,239,353
North Carolina	1,027,559	424,368	603,191	1,030,662	497,246	533,416
North Dakota	88,518	37,462	51,056	82,713	41,266	41,446
Ohio	1,423,058	594,640	828,418	1,453,638	719,308	734,331
Oklahoma	442,781	187,835	254,946	432,933	213,346	219,587
Oregon	456,036	199,647	256,389	470,441	238,751	231,690
Pennsylvania	1,769,591	724,612	1,044,979	1,854,684	892,261	962,424
Rhode Island	138,201	55,712	82,489	142,514	66,936	75,578
South Carolina	519,054	217,209	301,845	520,655	256,583	264,072
South Dakota	107,896	46,687	61,209	100,582	51,089	49,492
Tennessee	727,300	302,511	424,789	721,680	352,524	369,156
Texas	2,083,524	903,534	1,179,990	2,045,070	1,041,504	1,003,566
Utah	200,935	89,441	111,494	206,195	108,993	97,202
Vermont	80,056	34,692	45,364	81,162	40,928	40,234
Virginia	798,978	334,044	464,934	802,486	392,125	410,361
Washington	684,459	301,023	383,436	725,044	371,009	354,035
West Virginia	262,179	110,290	151,889	257,404	127,644	129,760
Wisconsin	705,038	299,190	405,848	737,739	366,769	370,970
Wyoming	59,630	27,033	32,597	60,744	32,205	28,539

(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 2006—Continued**

State or area	Number			Total monthly benefits (thousands of dollars)		
	Total	Men	Women	Total	Men	Women
Outlying areas						
American Samoa	1,921	924	997	1,248	684	563
Guam	7,567	3,754	3,813	5,036	2,862	2,174
Northern Mariana Islands	1,055	565	490	599	375	224
Puerto Rico	423,423	189,402	234,021	275,934	142,261	133,674
Virgin Islands	11,105	5,179	5,926	9,711	5,106	4,605
Foreign countries	397,342	182,424	214,918	216,622	106,282	110,340

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

a. Includes beneficiaries with unknown state code.

CONTACT: Shirley Turpin (410) 965-0181.

## 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 2006**  
(in thousands of dollars)

State or area	Total <sup>a</sup>	Retirement			Survivors		Disability		
		Retired workers	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
All areas <sup>b</sup>	46,938,032	32,351,857	1,282,859	253,820	4,576,981	1,298,187	6,655,048	39,563	479,716
Alabama	829,345	504,923	21,279	4,990	86,356	27,750	169,700	1,116	13,231
Alaska	60,556	40,207	1,305	553	4,718	3,137	9,886	55	695
Arizona	923,845	658,668	24,444	4,165	77,590	22,603	127,070	640	8,664
Arkansas	509,093	320,568	11,970	2,674	48,995	15,170	101,514	606	7,595
California	4,325,913	3,040,374	132,241	27,580	397,274	118,157	568,019	3,029	39,240
Colorado	572,275	402,730	17,782	2,627	54,370	15,616	73,843	331	4,976
Connecticut	623,902	466,733	13,267	3,276	51,560	15,206	68,444	225	5,191
Delaware	156,827	111,252	3,558	688	13,370	4,018	22,273	79	1,588
District of Columbia	59,989	41,716	1,006	370	5,116	2,413	8,913	13	439
Florida	3,333,059	2,443,283	85,375	16,199	288,358	71,712	399,013	2,081	27,038
Georgia	1,178,611	779,716	26,211	6,896	109,703	42,789	197,933	971	14,391
Hawaii	197,311	151,357	4,122	1,574	15,035	4,487	19,334	103	1,298
Idaho	219,561	153,289	6,777	1,146	20,400	5,774	29,900	192	2,084
Illinois	1,903,902	1,340,463	49,803	10,897	197,007	55,212	232,133	1,186	17,202
Indiana	1,082,793	751,534	28,383	5,258	109,390	31,045	145,658	810	10,714
Iowa	536,138	385,097	16,500	2,205	57,849	12,422	57,921	256	3,889
Kansas	447,830	319,562	12,282	1,983	45,470	11,692	52,863	230	3,749
Kentucky	720,189	420,432	20,790	3,382	80,489	21,449	160,212	1,517	11,918
Louisiana	628,891	363,002	25,172	4,102	88,381	26,025	111,671	1,301	9,238
Maine	244,004	161,752	6,367	1,068	22,380	5,612	43,334	220	3,271
Maryland	766,978	546,054	18,229	3,976	71,927	24,625	95,224	335	6,608
Massachusetts	1,041,553	730,983	23,331	5,044	90,958	25,070	153,275	512	12,380
Michigan	1,821,467	1,243,521	52,608	10,541	182,502	52,457	259,426	1,577	18,836
Minnesota	781,321	564,986	21,654	3,356	74,203	18,628	91,879	317	6,298
Mississippi	475,427	286,499	10,246	3,296	46,480	18,856	100,921	654	8,475
Missouri	1,013,629	683,041	25,185	4,732	99,220	28,542	160,490	811	11,607
Montana	159,541	111,411	4,877	868	16,473	4,121	20,424	127	1,240
Nebraska	279,236	199,888	8,272	1,230	29,316	6,739	31,398	120	2,274
Nevada	349,512	252,809	7,381	1,705	26,729	8,907	48,734	203	3,045
New Hampshire	224,748	159,671	4,586	919	17,332	5,171	33,983	111	2,975
New Jersey	1,478,656	1,092,872	30,306	7,764	127,096	36,860	169,507	818	13,434
New Mexico	282,986	188,112	9,112	1,611	27,073	8,615	45,067	339	3,056
New York	3,109,962	2,205,632	71,775	19,511	271,175	77,944	428,503	2,496	32,927
North Carolina	1,459,551	997,679	27,993	6,788	117,798	40,488	250,523	1,041	17,241
North Dakota	103,624	71,155	4,263	449	13,933	2,621	10,505	53	645
Ohio	1,906,564	1,289,097	66,276	9,459	231,060	52,086	241,011	1,554	16,021
Oklahoma	595,108	396,122	16,380	2,896	62,728	17,705	92,631	583	6,063
Oregon	619,944	446,668	17,042	2,994	57,270	13,541	77,577	452	4,399
Pennsylvania	2,416,233	1,690,363	66,560	11,125	259,324	58,269	306,562	1,869	22,161
Rhode Island	186,982	134,157	3,105	836	14,591	4,128	28,079	91	1,996
South Carolina	752,077	503,672	15,135	3,974	63,666	23,167	132,248	615	9,599
South Dakota	127,535	91,011	4,271	516	14,036	3,257	13,508	59	877
Tennessee	1,030,141	673,960	25,878	5,373	100,247	31,543	179,586	1,086	12,469
Texas	2,785,617	1,836,926	95,178	15,621	314,264	93,580	397,751	3,064	29,233
Utah	271,195	192,393	9,638	1,699	23,764	9,643	31,295	192	2,571
Vermont	1,102,337	750,337	27,496	5,550	102,469	31,499	171,072	1,089	12,826
Virginia	108,882	76,802	2,684	590	9,712	2,563	15,337	64	1,129
Washington	964,904	685,382	27,894	4,905	86,184	22,643	129,107	637	8,151
West Virginia	387,993	219,729	13,898	2,024	49,480	10,657	85,217	1,168	5,819
Wisconsin	961,083	696,339	24,150	4,670	91,164	23,233	113,249	475	7,801
Wyoming	80,096	57,245	2,278	341	7,744	2,181	9,646	58	604

(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 2006  
(in thousands of dollars)—Continued**

State or area	Total <sup>a</sup>	Retirement			Survivors		Disability		
		Retired workers	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
Outlying areas									
American Samoa	2,943	1,100	62	123	320	369	831	11	127
Guam	7,734	4,623	334	180	778	623	1,060	9	127
Northern Mariana Islands	1,080	564	33	61	122	157	128	1	15
Puerto Rico	457,351	240,373	18,517	4,583	48,993	16,798	117,033	1,824	9,230
Virgin Islands	13,758	9,924	373	206	966	542	1,596	21	130
Foreign countries	256,254	164,100	17,227	2,667	52,073	8,072	11,032	168	914

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

- a. Includes special age-72 beneficiaries.
- b. Includes beneficiaries with unknown state code.

CONTACT: Shirley Turpin (410) 965-0181.

## 5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J5—Number, by state or other area and age, December 2006**

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 <sup>a</sup>	49,122,624	3,132,951	4,508,449	2,505,268	4,507,739	9,597,167	8,071,122	6,873,512	5,258,840	3,080,202	1,544,264	43,110
Alabama	920,843	77,322	116,468	67,369	89,533	169,754	140,792	112,540	79,984	44,398	21,966	717
Alaska	66,906	7,372	7,282	3,420	7,047	14,922	10,771	7,697	4,849	2,438	1,086	22
Arizona	940,213	60,606	79,691	44,689	91,456	194,529	160,553	132,245	96,740	54,092	25,051	561
Arkansas	576,997	45,845	68,432	40,422	56,382	108,612	89,149	70,731	51,622	29,966	15,386	450
California	4,504,672	282,838	375,202	209,189	376,548	899,713	759,706	641,156	509,875	299,506	146,901	4,038
Colorado	600,316	35,522	49,684	26,665	54,943	126,693	102,899	84,505	63,014	37,455	18,453	483
Connecticut	587,292	31,056	46,437	22,685	44,806	108,125	95,619	89,781	74,532	47,952	25,544	755
Delaware	153,544	9,681	13,963	7,646	14,975	31,397	26,010	21,707	15,264	8,631	4,168	102
District of Columbia	71,231	5,323	7,415	3,313	4,271	13,259	11,564	9,718	8,131	5,101	2,995	141
Florida	3,444,546	186,924	253,231	151,060	314,002	683,840	594,353	522,774	397,932	227,955	109,679	2,796
Georgia	1,269,987	101,353	132,004	78,721	132,913	259,213	203,626	156,039	110,254	63,536	31,424	904
Hawaii	204,207	11,266	12,754	7,475	17,927	39,774	34,375	32,072	26,043	14,905	7,410	206
Idaho	233,766	14,853	20,436	11,026	24,175	49,045	38,654	30,653	23,266	14,347	7,155	156
Illinois	1,906,454	116,961	162,687	83,050	163,194	370,096	313,904	275,877	219,149	131,191	68,385	1,960
Indiana	1,080,547	68,216	102,721	53,421	104,271	212,031	174,088	150,488	114,943	66,341	33,110	917
Iowa	555,803	25,454	42,859	21,690	46,782	105,908	93,766	83,912	67,468	43,131	24,065	768
Kansas	454,919	25,860	37,853	19,462	37,249	85,621	75,852	67,243	53,338	33,421	18,464	556
Kentucky	812,644	63,159	110,054	61,848	79,666	149,819	119,953	97,549	70,941	39,803	19,345	507
Louisiana	722,643	63,052	83,747	44,648	66,529	135,457	111,858	93,891	67,903	37,587	17,491	480
Maine	275,175	17,338	32,385	15,741	24,821	50,255	43,662	37,570	28,112	16,480	8,569	242
Maryland	778,689	51,180	63,139	33,153	66,061	158,075	131,662	111,450	86,757	51,415	25,097	700
Massachusetts	1,072,305	64,359	111,926	48,901	74,983	187,930	170,495	158,279	131,019	81,040	42,162	1,211
Michigan	1,776,084	114,844	170,336	92,605	183,341	334,780	276,503	246,242	190,321	111,340	54,290	1,482
Minnesota	801,237	39,573	66,270	30,979	72,320	159,567	133,027	115,441	91,610	58,701	32,748	1,001
Mississippi	553,844	54,243	73,986	40,999	52,098	100,161	81,333	65,404	45,927	25,778	13,418	497
Missouri	1,077,060	72,282	111,761	58,673	100,640	205,165	173,490	145,022	110,005	64,976	33,994	1,052
Montana	172,920	9,647	13,865	8,036	17,778	36,109	28,611	23,942	17,690	11,180		
Nebraska	293,935	15,270	23,175	11,799	23,271	55,423	50,380	44,835	35,093	21,916	12,358	415
Nevada	354,321	22,595	27,145	17,285	36,870	82,330	64,228	48,228	32,255	16,465	6,772	148
New Hampshire	226,313	15,113	23,677	10,472	20,124	43,704	36,846	31,084	23,708	14,165	7,221	199
New Jersey	1,381,151	76,694	104,453	57,898	111,509	265,753	232,594	212,237	167,983	100,764	49,938	1,328
New Mexico	319,935	23,723	31,725	17,856	30,658	64,819	53,239	42,510	30,022	16,947	8,226	210
New York	3,075,081	186,596	276,021	153,970	268,356	577,739	500,193	442,529	347,816	207,304	111,264	3,293
North Carolina	1,550,340	103,463	158,886	100,197	160,235	306,678	251,489	201,170	145,326	81,981	39,754	1,161
North Dakota	115,434	4,869	8,188	4,236	9,623	21,502	19,892	18,012	14,090	9,269	5,591	162
Ohio	1,976,174	108,314	176,784	91,231	176,787	381,873	325,349	290,264	228,213	132,426	63,320	1,613
Oklahoma	647,067	42,405	62,665	36,842	62,374	128,531	108,316	87,301	64,137	36,479	17,509	508
Oregon	630,822	30,233	48,145	30,557	65,851	129,666	102,485	87,073	70,789	43,328	22,159	536
Pennsylvania	2,438,397	132,905	211,155	111,537	213,209	445,980	393,793	371,046	295,914	176,021	84,735	2,102
Rhode Island	193,099	10,938	19,339	10,079	14,542	32,704	29,083	28,329	24,749	15,143	8,009	184
South Carolina	801,076	58,321	83,478	53,626	86,597	161,123	129,057	98,660	70,999	39,844	18,830	541
South Dakota	142,953	7,078	10,326	5,428	12,225	27,633	24,330	21,684	16,973	10,751	6,310	215
Tennessee	1,115,933	80,407	122,887	71,484	113,855	221,991	178,375	140,434	100,932	57,173	27,631	764
Texas	3,028,901	224,945	281,138	154,972	284,322	619,059	511,976	409,419	296,423	163,730	80,629	2,288
Utah	282,158	21,732	23,422	10,734	25,335	58,270	48,976	39,640	29,276	16,926	7,713	134
Vermont	114,559	6,596	11,716	5,506	10,685	22,513	18,461	15,854	12,074	7,221	3,818	115
Virginia	1,161,105	76,644	113,125	64,035	108,323	235,868	191,500	156,471	115,194	67,029	31,972	944
Washington	961,739	51,249	83,082	47,432	95,517	196,827	156,092	129,896	103,400	64,863	32,526	855
West Virginia	419,477	28,532	52,582	34,441	41,743	76,308	62,189	52,841	39,135	21,260	10,182	264
Wisconsin	966,818	48,954	80,922	40,636	91,268	187,379	159,563	142,221	110,200	68,027	36,611	1,037
Wyoming	82,748	4,645	6,523	3,628	8,322	17,856	14,387	11,780	8,361	4,793	2,386	67

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J5—Number, by state or other area and age, December 2006—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	5,503	1,804	683	601	494	824	522	323	168	59	25	0
Guam	12,481	2,144	1,137	517	1,116	2,754	2,243	1,439	776	264	<sup>b</sup>	<sup>b</sup>
Northern Mariana Islands	2,306	676	282	101	192	451	304	179	82	28	11	0
Puerto Rico	723,203	68,819	86,709	63,069	81,183	133,155	107,243	78,806	55,559	30,742	17,334	584
Virgin Islands	16,673	1,549	1,097	714	2,208	4,185	3,044	1,834	1,135	598	300	9
Foreign countries	468,078	19,609	11,394	7,499	32,234	104,419	98,698	83,485	61,369	32,020	<sup>b</sup>	<sup>b</sup>

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

- a. Includes beneficiaries with unknown state code.
- b. Not shown to avoid disclosure of information regarding particular individuals.

CONTACT: Shirley Turpin (410) 965-0181.

## 5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J5.1—Number, by state or other area, race, and sex, December 2006**

State or area	All races				Adult beneficiaries	
	Total <sup>a</sup>	White	Black	Other <sup>b</sup>	Men	Women
All areas <sup>c</sup>	49,122,624	40,554,883	5,045,907	3,361,291	19,626,171	25,455,923
Alabama	920,843	679,219	204,832	34,984	349,525	472,413
Alaska	66,906	50,853	1,999	13,846	28,821	29,634
Arizona	940,213	831,056	26,987	79,474	391,501	476,387
Arkansas	576,997	485,037	68,732	21,907	227,734	291,764
California	4,504,672	3,467,710	313,747	704,191	1,851,240	2,298,831
Colorado	600,316	541,213	21,007	36,187	248,782	308,237
Connecticut	587,292	515,340	40,683	28,694	231,633	314,158
Delaware	153,544	123,030	23,949	6,159	61,403	80,192
District of Columbia	71,231	18,784	48,382	3,736	27,154	37,254
Florida	3,444,546	2,900,041	335,039	198,150	1,428,154	1,786,238
Georgia	1,269,987	901,100	309,564	56,020	483,678	658,602
Hawaii	204,207	57,703	2,270	143,391	84,641	105,761
Idaho	233,766	221,608	645	10,784	98,781	116,722
Illinois	1,906,454	1,545,418	249,355	105,816	748,181	1,003,651
Indiana	1,080,547	963,994	78,325	35,653	421,209	569,203
Iowa	555,803	531,219	8,973	14,060	221,608	298,759
Kansas	454,919	412,993	22,075	18,586	179,627	241,884
Kentucky	812,644	734,774	46,391	29,210	324,899	405,208
Louisiana	722,643	506,152	184,082	30,155	283,989	355,132
Maine	275,175	263,030	960	10,194	113,365	139,085
Maryland	778,689	553,462	181,879	41,006	302,989	412,507
Massachusetts	1,072,305	960,147	46,013	60,919	419,905	567,342
Michigan	1,776,084	1,486,028	216,553	68,398	704,562	918,250
Minnesota	801,237	751,742	17,202	29,445	326,544	421,293
Mississippi	553,844	367,852	164,046	20,634	206,602	277,989
Missouri	1,077,060	942,931	96,809	34,433	425,249	558,942
Montana	172,920	162,548	387	9,493	73,725	86,766
Nebraska	293,935	273,162	9,623	10,285	116,200	157,357
Nevada	354,321	294,449	25,188	33,785	155,772	172,619
New Hampshire	226,313	216,581	1,333	7,622	91,250	116,560
New Jersey	1,381,151	1,125,187	155,756	95,086	535,791	745,450
New Mexico	319,935	270,441	5,779	42,544	133,199	157,524
New York	3,075,081	2,415,459	379,041	265,518	1,202,254	1,622,942
North Carolina	1,550,340	1,183,629	298,076	64,968	601,069	816,838
North Dakota	115,434	109,924	265	4,816	46,889	61,372
Ohio	1,976,174	1,716,015	188,990	64,870	788,168	1,038,335
Oklahoma	647,067	567,864	37,930	39,558	257,126	335,463
Oregon	630,822	589,290	7,863	31,967	264,629	327,071
Pennsylvania	2,438,397	2,156,614	190,449	85,378	953,607	1,305,907
Rhode Island	193,099	174,594	6,502	10,977	74,838	103,870
South Carolina	801,076	579,311	191,344	28,647	310,987	415,575
South Dakota	142,953	133,946	494	8,053	58,789	74,570
Tennessee	1,115,933	940,239	132,473	40,778	433,407	579,284
Texas	3,028,901	2,437,963	336,048	246,620	1,213,048	1,536,546
Utah	282,158	263,186	1,811	16,259	114,255	141,859
Vermont	114,559	109,813	428	3,747	47,173	58,598
Virginia	1,161,105	891,094	211,965	55,039	454,959	608,433
Washington	961,739	864,498	24,844	69,414	401,885	493,557
West Virginia	419,477	392,061	10,654	15,898	173,558	205,983
Wisconsin	966,818	892,463	39,881	31,418	391,193	507,963
Wyoming	82,748	78,441	469	3,593	35,302	41,661

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J5.1—Number, by state or other area, race, and sex, December 2006—Continued

State or area	All races				Adult beneficiaries	
	Total <sup>a</sup>	White	Black	Other <sup>b</sup>	Men	Women
Outlying areas						
American Samoa	5,503	334	46	5,105	1,688	1,887
Guam	12,481	1,213	195	11,001	4,992	5,130
Northern Mariana Islands	2,306	261	56	1,975	778	789
Puerto Rico	723,203	532,503	51,030	136,290	288,371	342,216
Virgin Islands	16,673	2,900	12,219	1,484	6,861	7,913
Foreign countries	468,078	366,464	14,269	83,071	202,632	240,447

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: 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.

- a. Includes 160,543 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.
- c. Includes beneficiaries with unknown state code.

CONTACT: Shirley Turpin (410) 965-0181.

## 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 2006**

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 <sup>a</sup>	30,976,143	100.0	15.8	8.2	7.6	7.0	7.4	8.3	9.1	8.9	7.7	20.1	1,044.40	1,051.50
Alabama	502,502	100.0	16.2	9.1	8.7	8.4	8.4	8.8	8.9	8.1	7.1	16.4	1,004.80	990.50
Alaska	40,237	100.0	20.8	8.6	7.9	7.1	7.5	7.2	7.2	7.2	6.7	19.9	999.20	975.50
Arizona	617,724	100.0	13.7	7.9	7.4	6.7	7.2	8.4	9.7	9.7	8.4	20.9	1,066.30	1,084.50
Arkansas	327,697	100.0	16.7	9.5	9.3	9.2	9.2	9.2	8.9	7.9	6.3	13.8	978.20	957.50
California	2,912,853	100.0	18.7	7.9	7.3	6.6	6.7	7.2	7.9	8.0	7.1	22.7	1,043.80	1,041.50
Colorado	392,178	100.0	18.2	7.9	7.5	6.7	6.9	7.6	8.5	8.6	7.5	20.5	1,026.90	1,037.50
Connecticut	408,611	100.0	10.4	6.8	6.7	6.1	6.7	8.1	9.2	9.9	8.8	27.2	1,142.20	1,159.50
Delaware	100,779	100.0	10.8	7.5	7.0	6.3	7.0	8.5	10.3	10.9	9.2	22.4	1,103.90	1,130.50
District of Columbia	45,919	100.0	31.5	8.6	8.0	7.4	6.8	6.0	5.3	4.8	4.2	17.5	908.50	824.50
Florida	2,349,812	100.0	15.4	8.6	7.8	7.2	7.7	8.5	9.1	9.0	7.5	19.3	1,039.80	1,040.50
Georgia	764,680	100.0	15.9	8.8	8.7	8.2	8.2	8.3	8.5	8.2	7.1	18.2	1,019.70	1,002.50
Hawaii	146,599	100.0	17.2	7.7	7.2	7.1	8.1	8.7	9.2	8.1	7.5	19.2	1,032.50	1,032.00
Idaho	150,186	100.0	15.7	8.7	7.8	7.4	8.1	9.0	9.7	8.9	7.8	17.0	1,020.70	1,027.50
Illinois	1,238,100	100.0	14.4	7.6	6.8	6.1	6.5	7.9	9.2	9.5	8.6	23.4	1,082.70	1,107.50
Indiana	683,997	100.0	10.6	7.6	6.8	6.3	7.2	9.1	10.7	10.6	9.4	21.6	1,098.70	1,123.50
Iowa	369,639	100.0	13.5	8.5	7.5	7.2	8.1	9.6	10.7	9.6	8.4	16.9	1,041.80	1,055.50
Kansas	299,083	100.0	12.8	8.1	7.5	7.1	7.8	8.9	9.9	9.7	8.1	20.1	1,068.50	1,076.50
Kentucky	424,678	100.0	17.9	9.1	8.4	7.9	8.0	8.5	9.2	8.4	7.2	15.4	990.00	984.50
Louisiana	371,872	100.0	21.8	8.8	7.9	7.2	7.1	7.5	8.4	7.6	6.5	17.1	976.10	961.50
Maine	167,240	100.0	19.5	9.1	8.6	8.2	8.5	8.8	8.9	7.8	6.2	14.3	967.20	953.50
Maryland	515,455	100.0	16.8	7.5	7.0	6.7	6.9	7.7	8.5	8.5	7.7	22.6	1,059.40	1,067.50
Massachusetts	695,199	100.0	17.3	8.0	7.5	6.7	6.9	7.6	8.1	8.3	7.2	22.5	1,051.50	1,049.00
Michigan	1,103,565	100.0	10.0	7.3	6.4	5.6	6.6	8.8	10.3	10.9	9.8	24.4	1,126.80	1,155.50
Minnesota	537,792	100.0	14.5	8.7	7.7	6.7	7.1	8.1	9.3	9.5	8.4	19.9	1,050.60	1,066.50
Mississippi	296,755	100.0	18.4	10.0	9.5	9.1	8.9	8.6	8.2	7.3	6.1	14.0	965.40	933.50
Missouri	663,590	100.0	15.3	8.6	7.9	7.4	7.8	8.7	9.6	9.2	7.8	17.7	1,029.30	1,035.50
Montana	111,990	100.0	17.2	8.8	8.2	7.8	8.2	9.0	9.5	8.9	7.3	14.9	994.80	997.50
Nebraska	194,402	100.0	14.8	8.6	8.1	7.9	8.5	9.0	9.6	9.0	7.6	17.1	1,028.20	1,025.20
Nevada	240,460	100.0	15.2	8.1	7.6	7.2	7.4	7.9	8.6	9.0	8.0	21.0	1,051.40	1,059.50
New Hampshire	148,322	100.0	12.2	7.8	7.7	7.3	7.9	8.9	9.7	9.4	7.9	21.2	1,076.50	1,081.50
New Jersey	948,401	100.0	10.8	7.0	6.6	5.9	6.3	7.5	8.7	9.4	8.6	29.2	1,152.30	1,171.50
New Mexico	192,565	100.0	20.2	8.9	8.3	7.9	8.0	8.1	8.3	7.7	6.5	16.1	976.90	959.50
New York	2,001,974	100.0	13.1	7.5	6.9	6.4	7.1	8.2	9.2	9.4	8.2	24.1	1,101.70	1,109.80
North Carolina	970,774	100.0	13.1	8.6	9.0	9.0	9.3	9.4	9.3	8.6	7.1	16.7	1,027.70	1,011.50
North Dakota	73,133	100.0	18.4	9.8	8.8	8.2	8.6	8.4	8.9	8.3	6.6	14.0	972.90	954.50
Ohio	1,220,222	100.0	15.7	7.5	6.5	5.8	6.6	8.5	10.2	10.1	8.9	20.4	1,056.40	1,095.50
Oklahoma	394,760	100.0	16.9	8.6	8.2	8.1	8.5	8.9	9.6	8.5	6.9	15.9	1,003.40	998.50
Oregon	424,170	100.0	13.9	8.0	7.2	6.7	7.5	9.2	10.5	9.9	8.6	18.5	1,053.00	1,075.00
Pennsylvania	1,571,817	100.0	12.5	7.8	6.9	6.5	7.4	9.3	10.9	10.2	8.6	19.8	1,075.40	1,095.00
Rhode Island	128,410	100.0	14.7	8.2	7.7	7.5	8.3	9.1	9.3	8.7	7.2	19.2	1,044.80	1,040.00
South Carolina	489,743	100.0	13.6	8.6	8.9	8.7	8.9	9.1	9.0	8.5	7.3	17.4	1,028.40	1,013.50
South Dakota	94,207	100.0	18.5	9.7	9.0	8.7	8.7	8.9	9.0	7.8	6.4	13.4	966.10	947.00
Tennessee	659,946	100.0	14.7	9.0	8.8	8.5	8.6	8.9	9.1	8.3	7.2	17.0	1,021.20	1,005.50
Texas	1,807,534	100.0	18.9	8.4	7.8	7.2	7.1	7.5	8.3	7.9	6.8	19.8	1,016.30	1,006.00
Utah	182,948	100.0	16.7	8.6	7.2	6.0	6.2	7.0	9.0	9.1	8.3	21.9	1,051.60	1,077.50
Vermont	73,887	100.0	13.5	8.3	8.0	8.0	8.7	9.6	9.9	9.1	7.5	17.4	1,039.50	1,036.50
Virginia	725,945	100.0	16.1	8.3	8.1	7.7	7.9	8.2	8.7	8.2	7.3	19.5	1,033.60	1,023.00
Washington	631,195	100.0	13.0	7.7	6.9	6.3	6.8	8.1	9.5	9.9	9.1	22.5	1,085.80	1,112.50
West Virginia	212,985	100.0	14.2	7.9	7.4	7.4	8.4	9.6	11.0	9.8	8.4	15.9	1,031.70	1,051.50
Wisconsin	649,341	100.0	11.9	8.3	7.1	6.3	7.2	9.1	11.0	10.9	9.3	18.9	1,072.40	1,101.50
Wyoming	55,007	100.0	15.0	8.8	7.4	6.9	7.3	8.6	9.6	9.5	8.3	18.7	1,040.70	1,056.50

(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 2006—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	1,639	100.0	49.2	12.4	9.6	6.6	5.2	4.6	3.1	2.6	1.6	4.9	671.10	606.00	
Guam	6,599	100.0	49.1	10.9	8.5	6.6	5.2	4.4	3.6	2.6	2.4	6.6	700.50	607.00	
Northern Mariana Islands	941	100.0	61.4	9.9	6.7	4.6	2.9	2.7	2.1	2.2	1.9	5.6	599.10	518.50	
Puerto Rico	344,564	100.0	43.4	14.4	11.3	8.2	6.3	4.7	3.4	2.5	1.9	3.9	697.60	643.00	
Virgin Islands	10,948	100.0	22.5	11.6	11.1	10.1	8.5	8.0	6.4	5.6	5.1	11.2	906.40	845.00	
Foreign countries	280,572	100.0	57.7	9.6	7.2	5.6	4.4	3.7	3.0	2.4	2.0	4.3	584.90	531.00	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

a. Includes beneficiaries with unknown state code.

CONTACT: Shirley Turpin (410) 965-0181.

## 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 2006**

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 <sup>a</sup>	6,806,918	100.0	17.0	11.5	11.2	10.0	8.7	7.5	6.3	5.3	4.5	17.9	977.70	902.50
Alabama	178,375	100.0	17.0	12.4	12.3	10.7	9.3	7.6	6.2	5.0	4.1	15.4	951.40	876.00
Alaska	10,211	100.0	18.9	11.7	11.5	9.5	8.1	7.3	6.1	4.7	3.9	18.3	968.20	879.00
Arizona	125,727	100.0	14.6	10.6	10.9	10.0	8.8	7.8	6.8	5.8	5.0	19.8	1,010.70	942.00
Arkansas	109,118	100.0	17.3	12.3	12.2	11.2	9.9	8.3	6.7	5.3	4.2	12.6	930.30	871.50
California	570,084	100.0	18.1	10.8	10.2	9.0	8.0	7.0	6.1	5.3	4.6	20.7	996.40	920.50
Colorado	75,836	100.0	17.0	11.7	11.2	10.1	8.9	7.5	6.4	5.4	4.6	17.3	973.70	900.50
Connecticut	67,281	100.0	14.6	11.0	10.6	9.8	8.8	7.7	6.6	5.6	4.8	20.6	1,017.30	944.50
Delaware	21,685	100.0	14.2	10.3	10.6	9.9	8.6	7.8	6.8	5.7	4.9	21.1	1,027.10	957.50
District of Columbia	10,233	100.0	21.4	14.4	14.0	10.9	9.1	7.5	5.5	4.3	2.9	9.9	871.00	801.00
Florida	407,268	100.0	15.9	11.6	11.5	10.4	9.0	7.8	6.5	5.5	4.5	17.4	979.70	906.00
Georgia	205,249	100.0	15.7	11.5	11.8	11.0	9.7	8.2	6.9	5.5	4.5	15.2	964.40	899.50
Hawaii	19,203	100.0	15.1	10.9	10.4	9.8	8.4	8.1	7.1	6.1	4.7	19.4	1,006.80	943.50
Idaho	31,318	100.0	18.9	12.0	11.1	9.6	8.3	7.2	6.4	5.3	4.5	16.5	954.70	881.00
Illinois	231,633	100.0	16.6	11.0	10.5	9.4	8.3	7.3	6.2	5.3	4.7	20.5	1,002.20	926.00
Indiana	148,690	100.0	17.1	11.5	11.0	9.8	8.8	7.6	6.4	5.2	4.4	18.2	979.60	906.00
Iowa	61,782	100.0	19.2	12.6	11.3	9.9	8.7	7.3	6.1	5.3	4.5	15.1	937.50	866.80
Kansas	55,542	100.0	18.0	12.3	11.3	10.2	8.7	7.9	6.4	5.5	4.3	15.6	951.80	882.00
Kentucky	167,356	100.0	19.1	11.9	11.0	9.7	8.4	7.1	6.1	5.0	4.3	17.4	957.30	881.50
Louisiana	114,609	100.0	18.8	11.6	10.8	9.3	8.0	6.7	5.8	5.1	4.6	19.2	974.40	894.00
Maine	48,022	100.0	19.6	13.1	13.0	11.1	9.5	7.6	6.0	4.8	3.6	11.7	902.40	835.00
Maryland	94,524	100.0	15.4	10.7	10.6	9.7	8.8	7.9	6.6	5.7	4.8	19.8	1,007.40	938.50
Massachusetts	158,781	100.0	16.5	12.2	11.8	10.6	9.1	7.7	6.2	5.1	4.2	16.5	965.30	887.50
Michigan	250,351	100.0	16.7	10.5	9.8	8.5	7.5	6.6	5.9	5.1	4.8	24.5	1,036.20	958.00
Minnesota	94,885	100.0	17.5	11.9	11.5	10.1	8.8	7.4	6.1	5.0	4.3	17.4	968.30	890.00
Mississippi	109,531	100.0	17.6	12.7	13.0	11.6	9.7	7.7	6.2	5.0	4.0	12.4	921.40	854.50
Missouri	168,301	100.0	17.6	12.3	11.8	10.3	9.0	7.6	6.2	5.2	4.3	15.8	953.60	878.50
Montana	21,611	100.0	18.7	12.4	11.6	10.1	8.8	7.0	6.1	5.1	4.6	15.6	945.10	872.00
Nebraska	33,915	100.0	18.8	12.7	12.0	10.3	9.0	7.7	6.6	5.3	4.4	13.0	925.80	859.00
Nevada	46,966	100.0	12.7	10.0	10.7	10.1	9.0	8.2	6.8	5.9	5.1	21.4	1,037.60	969.00
New Hampshire	34,310	100.0	13.6	11.1	11.8	11.0	9.9	8.4	6.9	5.7	4.7	16.9	990.50	924.50
New Jersey	158,619	100.0	13.4	9.7	9.9	9.3	8.3	7.4	6.4	5.5	4.9	25.1	1,068.60	992.00
New Mexico	48,044	100.0	19.1	12.2	11.4	10.3	8.9	7.4	6.3	5.2	4.2	15.0	938.00	868.80
New York	416,715	100.0	16.5	10.6	10.1	9.0	8.0	7.0	6.1	5.2	4.6	22.9	1,028.30	947.00
North Carolina	261,068	100.0	15.0	11.3	11.8	11.5	10.4	8.8	7.2	5.7	4.4	13.9	959.60	903.50
North Dakota	11,604	100.0	21.0	12.7	12.6	10.1	8.9	6.9	5.9	5.3	4.1	12.4	905.30	836.80
Ohio	251,748	100.0	20.3	12.0	10.6	9.2	7.9	6.8	5.8	5.0	4.4	18.2	957.30	876.50
Oklahoma	97,042	100.0	18.3	11.7	11.1	9.9	8.5	7.6	6.5	5.7	4.7	16.0	954.50	889.50
Oregon	78,860	100.0	17.3	11.5	10.7	9.7	8.4	7.3	6.2	5.3	4.8	18.9	983.70	909.00
Pennsylvania	309,778	100.0	16.7	11.0	10.7	9.7	8.6	7.5	6.5	5.5	4.8	19.0	989.60	920.50
Rhode Island	29,721	100.0	17.4	12.8	12.2	10.9	9.1	7.4	6.0	4.9	4.3	15.0	944.80	868.00
South Carolina	135,892	100.0	14.3	11.0	11.5	11.3	10.2	8.9	7.3	5.8	4.7	15.0	973.20	916.50
South Dakota	15,038	100.0	21.2	13.1	12.4	9.9	8.8	7.7	6.2	4.8	3.9	11.9	898.30	830.30
Tennessee	190,539	100.0	16.9	12.2	12.3	11.1	9.5	8.0	6.5	5.2	4.3	14.0	942.50	876.00
Texas	410,912	100.0	17.3	11.6	11.2	10.0	9.0	7.6	6.5	5.4	4.5	16.9	968.00	899.00
Utah	32,274	100.0	18.8	11.9	11.3	9.3	8.0	6.9	6.1	4.8	4.2	18.6	969.70	883.50
Vermont	16,663	100.0	18.3	12.8	12.2	11.1	9.7	8.1	6.5	5.1	3.7	12.5	920.40	859.00
Virginia	173,734	100.0	15.5	11.0	11.2	10.5	9.2	8.1	6.8	5.6	4.6	17.6	984.70	918.00
Washington	130,146	100.0	17.1	11.3	11.1	9.6	8.2	7.1	6.0	5.1	4.6	19.7	992.00	909.00
West Virginia	83,143	100.0	17.2	10.1	9.6	8.7	7.6	6.9	6.2	5.4	4.8	23.6	1,024.90	958.00
Wisconsin	116,190	100.0	17.7	11.6	10.9	9.7	8.5	7.2	6.2	5.2	4.7	18.2	974.70	899.50
Wyoming	9,918	100.0	18.7	11.6	11.5	9.7	7.7	6.8	5.6	5.2	4.5	18.7	972.50	881.50

(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 2006—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	1,109	100.0	32.7	17.0	13.2	9.3	7.3	7.2	5.1	3.0	1.6	3.6	749.60	701.50	
Guam	1,247	100.0	24.8	15.2	11.2	9.3	8.0	7.2	6.6	4.3	3.8	9.7	850.00	792.00	
Northern Mariana Islands	196	100.0	46.4	18.9	11.7	8.7	2.0	b	5.1	2.0	b	2.6	651.50	615.50	
Puerto Rico	139,966	100.0	18.4	17.5	17.4	13.4	9.6	6.8	4.7	3.4	2.6	6.1	836.20	779.20	
Virgin Islands	1,621	100.0	15.9	9.6	11.4	10.5	9.7	8.9	6.5	6.6	4.3	16.6	984.40	925.00	
Foreign countries	12,734	100.0	26.8	10.3	10.4	9.3	8.5	b	5.7	5.1	b	12.7	866.40	824.50	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

- a. Includes beneficiaries with unknown state code.
- b. Not shown to avoid disclosure of information regarding particular individuals.

CONTACT: Shirley Turpin (410) 965-0181.

## 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 2006**

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 <sup>a</sup>	4,273,442	100.0	13.5	6.0	7.9	9.4	11.2	13.0	11.3	9.0	6.4	12.3
Alabama	84,155	100.0	17.7	7.7	9.7	10.6	11.4	11.8	9.8	7.5	5.2	8.7	937.80	938.50
Alaska	4,405	100.0	18.8	6.2	7.4	9.9	10.4	11.8	10.8	8.1	5.8	10.8	957.50	975.50
Arizona	70,052	100.0	10.8	4.6	6.8	9.0	11.2	14.1	12.9	10.0	7.3	13.3	1,044.10	1,056.00
Arkansas	49,074	100.0	18.4	8.8	10.5	10.9	11.3	11.5	9.4	6.8	4.6	7.8	917.30	911.50
California	362,935	100.0	14.0	5.6	7.3	8.7	10.3	12.1	11.0	8.9	6.7	15.4	1,033.10	1,035.50
Colorado	50,350	100.0	12.6	5.6	7.5	9.2	11.1	12.7	11.7	9.3	6.8	13.3	1,023.70	1,033.00
Connecticut	43,821	100.0	7.0	3.6	5.4	7.9	10.7	13.3	12.7	11.2	8.7	19.5	1,128.00	1,116.00
Delaware	11,698	100.0	6.3	4.3	6.9	9.1	11.4	14.7	13.6	11.4	7.7	14.5	1,083.80	1,081.00
District of Columbia	5,810	100.0	32.9	10.3	9.4	8.5	8.9	6.8	5.4	4.6	3.1	10.1	839.10	773.30
Florida	264,478	100.0	10.8	5.6	7.9	10.0	11.8	13.5	11.8	9.2	6.4	13.0	1,034.00	1,030.50
Georgia	105,662	100.0	16.9	7.7	9.5	10.4	10.8	11.3	9.7	7.9	5.5	10.3	955.70	951.50
Hawaii	14,466	100.0	15.4	6.3	8.7	10.8	11.5	12.2	10.1	8.1	5.4	11.4	979.70	976.50
Idaho	18,576	100.0	8.6	5.4	8.4	10.7	12.5	14.8	12.7	9.3	6.6	11.1	1,030.30	1,031.50
Illinois	173,649	100.0	9.3	4.4	6.3	8.4	11.0	14.1	12.6	10.4	7.9	15.7	1,076.50	1,076.50
Indiana	95,812	100.0	6.3	3.9	6.5	9.2	12.4	15.7	13.9	11.3	7.8	13.0	1,076.00	1,075.50
Iowa	53,631	100.0	7.7	5.8	8.2	10.5	13.1	14.6	12.4	9.3	6.5	11.8	1,039.90	1,033.50
Kansas	40,650	100.0	8.0	5.1	7.5	9.9	11.8	13.8	12.1	9.9	7.4	14.6	1,066.80	1,058.50
Kentucky	79,415	100.0	19.4	8.0	9.2	10.0	11.0	12.2	9.7	7.4	5.0	8.1	923.60	932.50
Louisiana	87,951	100.0	19.8	8.2	9.4	10.0	10.3	11.2	9.6	7.4	5.2	9.0	926.80	926.50
Maine	21,797	100.0	13.8	7.1	9.6	11.5	12.6	12.2	10.6	7.6	5.5	9.5	969.70	965.50
Maryland	66,469	100.0	12.8	5.4	7.5	9.0	10.9	13.0	11.3	9.1	6.8	14.1	1,030.60	1,035.50
Massachusetts	82,727	100.0	12.4	5.1	7.0	8.7	10.8	12.1	11.5	9.5	7.1	15.8	1,049.40	1,051.50
Michigan	157,752	100.0	5.9	3.4	6.0	8.7	12.5	16.1	14.1	11.2	8.0	14.1	1,089.80	1,084.50
Minnesota	69,393	100.0	10.5	6.0	7.8	9.5	11.2	13.5	12.1	9.9	7.0	12.5	1,031.80	1,039.50
Mississippi	47,080	100.0	23.4	8.9	10.1	10.2	10.4	10.2	8.4	6.4	4.4	7.6	885.60	873.00
Missouri	91,899	100.0	11.3	6.0	8.4	10.1	11.9	13.8	11.5	9.3	6.3	11.3	1,012.50	1,016.50
Montana	15,499	100.0	10.0	6.1	8.9	11.1	13.1	14.2	11.6	8.4	6.2	10.3	1,009.10	1,005.50
Nebraska	27,208	100.0	8.8	6.4	8.7	10.8	12.4	13.3	11.4	8.9	6.6	12.8	1,035.50	1,022.50
Nevada	23,894	100.0	11.0	4.9	6.8	8.9	11.3	13.7	12.2	10.1	7.3	13.9	1,045.80	1,054.50
New Hampshire	15,283	100.0	7.8	4.1	7.2	9.2	12.1	14.9	12.8	9.8	7.4	14.8	1,073.40	1,068.50
New Jersey	109,205	100.0	7.6	3.9	6.3	8.4	10.7	13.4	12.4	10.8	8.4	18.2	1,106.30	1,098.50
New Mexico	27,094	100.0	19.1	7.8	9.4	10.1	11.1	11.5	9.5	7.3	5.0	9.2	933.10	933.50
New York	241,343	100.0	9.6	5.0	7.3	9.4	11.6	13.7	12.0	9.8	7.2	14.5	1,060.70	1,053.50
North Carolina	114,472	100.0	16.3	7.6	9.7	10.7	11.6	11.8	9.8	7.8	5.3	9.5	952.20	949.50
North Dakota	13,952	100.0	13.3	8.6	10.8	11.8	11.5	12.1	9.1	7.6	5.4	9.9	968.60	949.50
Ohio	211,387	100.0	10.5	4.4	6.6	8.7	11.7	15.1	13.2	10.4	7.2	12.2	1,040.30	1,055.50
Oklahoma	59,673	100.0	13.9	6.9	9.1	10.7	11.8	12.6	11.1	8.4	5.6	10.0	978.00	981.50
Oregon	51,318	100.0	7.7	4.3	7.0	9.5	12.8	15.2	13.3	10.3	7.1	12.8	1,058.70	1,058.00
Pennsylvania	233,467	100.0	7.3	4.4	7.1	9.7	12.8	15.7	13.6	10.4	7.1	12.0	1,057.50	1,057.50
Rhode Island	13,258	100.0	9.3	5.2	7.5	10.8	13.3	14.2	11.1	9.0	6.7	12.9	1,041.70	1,026.50
South Carolina	61,662	100.0	17.1	7.7	9.7	10.6	11.2	11.6	9.6	7.6	5.3	9.5	946.50	943.80
South Dakota	14,216	100.0	14.1	9.0	10.6	12.0	12.1	11.9	9.6	7.5	4.7	8.4	950.10	934.50
Tennessee	96,423	100.0	15.9	7.5	9.3	10.5	11.5	12.3	10.2	7.8	5.5	9.5	958.40	959.50
Texas	299,667	100.0	16.6	7.1	8.6	9.5	10.4	11.6	10.2	8.2	5.8	12.0	978.40	980.00
Utah	20,703	100.0	10.9	4.0	5.7	7.6	10.3	13.4	12.9	11.3	8.3	15.5	1,068.90	1,085.50
Vermont	9,073	100.0	10.3	6.8	8.6	11.0	12.6	13.3	11.6	8.8	5.7	11.3	1,011.30	1,004.50
Virginia	97,892	100.0	15.3	7.0	8.9	10.4	11.3	11.9	10.2	7.9	5.8	11.4	977.70	975.50
Washington	75,735	100.0	8.2	4.2	6.4	8.5	11.2	14.3	13.5	10.9	7.8	14.9	1,078.30	1,080.90
West Virginia	46,841	100.0	12.5	7.0	9.3	10.4	12.9	14.3	11.6	8.5	5.6	7.8	971.20	985.50
Wisconsin	82,179	100.0	6.7	4.5	6.8	9.5	12.6	15.5	13.9	11.0	7.5	12.0	1,063.40	1,065.50
Wyoming	7,017	100.0	8.6	5.7	8.1	10.1	11.6	14.1	13.0	9.0	7.0	12.9	1,044.60	1,044.50

(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 2006—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	380	100.0	57.6	12.4	9.5	6.1	5.0	2.6	2.1	0.8	1.6	2.4	607.40	545.00	
Guam	939	100.0	44.3	13.8	12.5	8.7	5.8	4.6	3.1	1.5	2.1	3.6	695.60	643.50	
Northern Mariana Islands	191	100.0	84.8	b	b	b	b	b	b	b	b	b	442.90	399.50	
Puerto Rico	71,592	100.0	55.6	12.2	9.3	7.1	5.2	3.7	2.4	1.5	1.0	2.0	616.10	561.50	
Virgin Islands	1,107	100.0	29.8	14.9	11.7	11.3	8.3	7.9	5.1	4.3	2.7	3.8	788.60	742.50	
Foreign countries	77,065	100.0	48.3	b	b	b	b	b	b	b	b	b	648.70	613.00	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Totals do not necessarily equal the sum of rounded components.

- a. Includes beneficiaries with unknown state code.
- b. Not shown to avoid disclosure of information regarding particular individuals.

CONTACT: Shirley Turpin (410) 965-0181.

## 5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J10—Number of children, by state or other area and type of benefit, December 2006**

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 <sup>a</sup>	4,040,530	3,133,398	282,281	1,530,255	1,320,862	776,596	192,122	71,878	512,596	130,536	15,537	49,595	65,404
Alabama	98,905	77,333	5,794	42,370	29,169	17,608	3,423	2,177	12,008	3,964	393	1,703	1,868
Alaska	8,451	7,373	1,033	2,362	3,978	784	206	61	517	294	40	65	189
Arizona	72,325	60,609	5,259	28,429	26,921	9,464	2,515	1,047	5,902	2,252	310	815	1,127
Arkansas	57,499	45,849	3,313	25,389	17,147	9,558	1,928	1,403	6,227	2,092	172	959	961
California	354,601	282,871	34,214	122,391	126,266	64,926	19,800	5,086	40,040	6,804	1,105	2,100	3,599
Colorado	43,297	35,527	2,910	15,522	17,095	6,134	1,737	562	3,835	1,636	208	558	870
Connecticut	41,501	31,057	2,910	15,481	12,666	9,515	2,491	652	6,372	929	118	348	463
Delaware	11,949	9,685	714	4,892	4,079	1,953	455	155	1,343	311	30	110	171
District of Columbia	6,823	5,324	581	1,526	3,217	1,354	206	90	1,058	145	26	20	99
Florida	230,154	186,958	21,439	85,065	80,454	35,194	9,429	3,523	22,242	8,002	1,171	2,694	4,137
Georgia	127,707	101,361	8,434	45,595	47,332	21,130	4,264	2,026	14,840	5,216	555	1,829	2,832
Hawaii	13,805	11,266	2,296	4,144	4,826	2,372	780	150	1,442	167	55	37	75
Idaho	18,263	14,857	1,251	7,272	6,334	2,808	809	312	1,687	598	93	238	267
Illinois	154,622	116,978	11,865	52,636	52,477	32,455	7,944	2,540	21,971	5,189	652	1,829	2,708
Indiana	90,135	68,221	4,668	34,247	29,306	17,492	3,922	1,712	11,858	4,422	456	1,777	2,189
Iowa	35,436	25,457	1,615	12,972	10,870	8,572	2,177	707	5,688	1,407	145	572	690
Kansas	33,408	25,864	1,823	12,211	11,830	6,237	1,578	566	4,093	1,307	144	464	699
Kentucky	82,537	63,168	3,235	38,784	21,149	16,682	3,329	2,222	11,131	2,687	221	1,403	1,063
Louisiana	83,522	63,068	4,696	30,233	28,139	17,679	3,618	1,906	12,155	2,775	266	1,064	1,445
Maine	22,725	17,342	970	11,447	4,925	4,708	1,058	673	2,977	675	67	352	256
Maryland	63,193	51,185	4,565	19,852	26,768	10,980	2,561	659	7,760	1,028	132	291	605
Massachusetts	85,058	64,364	4,438	39,270	20,656	18,413	4,699	1,759	11,955	2,281	278	994	1,009
Michigan	153,272	114,862	9,480	58,650	46,732	33,661	8,168	2,975	22,518	4,749	544	1,874	2,331
Minnesota	53,400	39,578	2,426	20,419	16,733	11,692	3,280	877	7,535	2,130	227	802	1,101
Mississippi	69,253	54,253	4,259	28,527	21,467	12,164	2,378	1,494	8,292	2,836	266	1,235	1,335
Missouri	92,869	72,289	4,642	37,775	29,872	16,652	3,697	1,832	11,123	3,928	408	1,670	1,850
Montana	12,429	9,647	1,012	4,112	4,523	2,232	619	168	1,445	550	79	161	310
Nebraska	20,378	15,273	982	7,667	6,624	4,325	1,201	385	2,739	780	75	326	379
Nevada	25,930	22,598	2,505	9,603	10,490	2,708	711	244	1,753	624	102	201	321
New Hampshire	18,503	15,112	815	9,681	4,616	2,801	640	338	1,823	590	80	244	266
New Jersey	99,910	76,705	7,534	36,520	32,651	20,233	5,403	1,337	13,493	2,972	352	1,088	1,532
New Mexico	29,212	23,726	2,131	10,489	11,106	4,482	1,251	432	2,799	1,004	139	353	512
New York	249,885	186,618	20,694	99,989	65,935	57,409	14,731	4,438	38,240	5,858	885	2,301	2,672
North Carolina	132,433	103,487	7,148	53,929	42,410	24,548	5,145	2,877	16,526	4,398	384	1,836	2,178
North Dakota	7,173	4,869	327	2,224	2,318	1,984	487	112	1,385	320	46	104	170
Ohio	149,671	108,337	8,254	52,803	47,280	35,309	8,293	2,686	24,330	6,025	663	2,217	3,145
Oklahoma	54,478	42,408	3,285	19,827	19,296	9,580	2,093	1,001	6,486	2,490	264	935	1,291
Oregon	39,122	30,234	3,240	13,467	13,527	7,573	2,089	695	4,789	1,315	186	452	677
Pennsylvania	178,883	132,929	9,588	71,033	52,308	39,944	9,614	3,604	26,726	6,010	643	2,557	2,810
Rhode Island	14,391	10,939	798	6,593	3,548	3,183	737	365	2,081	269	32	122	115
South Carolina	74,514	58,332	4,333	29,297	24,702	13,737	2,858	1,435	9,444	2,445	255	967	1,223
South Dakota	9,594	7,080	504	3,078	3,498	2,101	535	132	1,434	413	43	142	228
Tennessee	103,242	80,415	5,719	40,622	34,074	19,071	4,138	2,012	12,921	3,756	381	1,517	1,858
Texas	279,307	224,969	20,060	96,854	108,055	43,738	11,340	3,867	28,531	10,600	1,233	3,515	5,852
Utah	26,044	21,736	1,863	8,593	11,280	3,602	1,283	292	2,027	706	97	211	398
Vermont	8,788	6,597	583	3,747	2,267	1,949	493	225	1,231	242	29	114	99
Virginia	97,713	76,653	5,926	39,173	31,554	17,871	3,990	1,896	11,985	3,189	339	1,267	1,583
Washington	66,297	51,252	4,795	24,507	21,950	12,480	3,573	1,247	7,660	2,565	354	901	1,310
West Virginia	39,936	28,535	1,872	17,842	8,821	10,091	1,967	1,322	6,802	1,310	122	671	517
Wisconsin	67,662	48,967	3,424	25,276	20,267	16,185	4,397	1,374	10,414	2,510	306	1,013	1,191
Wyoming	5,785	4,646	336	1,934	2,376	907	247	78	582	232	32	78	122

(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 2006—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	1,805	368	668	769	101	22	b	71	22	5	b	15
Guam	2,359	2,144	494	539	1,111	146	54	13	79	69	16	15	38
Northern Mariana Islands	739	676	249	77	350	47	8	b	37	16	b	0	10
Puerto Rico	92,616	68,838	7,770	39,111	21,957	22,716	6,197	2,054	14,465	1,062	181	442	439
Virgin Islands	1,899	1,549	344	458	747	306	107	15	184	44	16	6	22
Foreign countries	24,999	19,623	6,498	3,081	10,044	5,050	1,447	58	3,545	326	b	b	182

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

- a. Includes beneficiaries with unknown state code.
- b. Not shown to avoid disclosure of information regarding particular individuals.

CONTACT: Shirley Turpin (410) 965-0181.

## 5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J11—Number and total monthly benefits for beneficiaries in foreign countries, December 2006**

Region and country <sup>a</sup>	Number						Total monthly benefits (thousands of dollars)	
	All beneficiaries	Retired workers	Disabled workers	Widow(er)s <sup>b</sup>	Wives and husbands	Children	All beneficiaries	Retired workers
All countries	468,078	280,572	12,734	80,359	69,414	24,999	256,254	164,100
Canada	102,123	60,084	2,399	18,636	18,651	2,353	47,372	29,480
Mexico	47,043	23,175	1,265	12,223	5,262	5,118	25,621	13,615
Central America and Caribbean	23,371	16,510	1,204	2,130	1,324	2,203	16,936	12,625
Barbados	1,073	897	24	81	52	19	876	748
Costa Rica	3,792	2,631	242	379	232	308	3,148	2,298
Dominican Republic	6,723	4,427	432	472	373	1,019	4,296	3,055
El Salvador	1,074	760	60	102	61	91	704	514
Guatemala	1,277	862	64	153	62	136	887	617
Honduras	999	652	59	95	56	137	762	532
Jamaica	2,694	2,154	71	205	160	104	1,923	1,600
Nicaragua	595	413	38	53	29	62	390	292
Panama	1,307	815	108	161	80	143	1,002	645
Trinidad and Tobago	917	726	29	84	45	33	736	600
Other	2,920	2,173	77	345	174	151	2,212	1,724
South America	15,801	10,928	579	2,120	1,331	843	11,170	8,061
Argentina	3,411	2,189	79	571	459	113	2,331	1,605
Brazil	2,006	1,222	64	389	193	138	1,508	972
Chile	1,482	1,018	39	225	133	67	1,114	803
Colombia	3,614	2,692	182	345	187	208	2,521	1,920
Ecuador	2,449	1,823	93	226	149	158	1,643	1,260
Peru	992	673	56	131	74	58	740	520
Uruguay	799	603	34	75	67	20	536	420
Other	1,048	708	32	158	69	81	777	561
Africa	2,018	1,235	143	214	131	295	1,501	1,022
Asia	57,372	30,855	1,684	9,511	9,700	5,622	34,165	21,022
China	602	439	25	48	49	41	400	301
Hong Kong	1,004	599	11	243	110	41	667	438
India	1,019	703	55	97	97	67	766	546
Israel	8,775	5,022	225	1,340	1,366	822	6,116	4,027
Japan	18,522	10,119	64	2,102	5,961	276	8,403	5,240
Philippines	20,003	9,713	869	4,963	1,559	2,899	12,543	6,947
South Korea	732	532	10	45	124	21	457	361
Thailand	1,764	1,329	125	95	42	173	1,627	1,257
Turkey	724	447	31	137	70	39	556	365
Yemen	1,461	458	78	123	76	726	745	348
Other	2,766	1,494	191	318	246	517	1,885	1,192
Europe	206,442	129,493	4,864	34,008	31,366	6,711	109,303	71,474
Austria	2,542	1,617	75	416	351	83	1,328	860
Belgium	1,772	1,084	20	288	310	70	944	599
Croatia	1,459	891	135	235	107	91	1,144	744
Czech Republic	619	450	42	72	25	30	539	406
Denmark	886	561	17	177	97	34	686	442
Finland	843	534	37	133	101	38	507	326
France	11,273	7,325	95	1,681	1,847	325	6,352	4,428
Germany	34,822	21,676	712	5,401	5,758	1,275	15,865	9,678
Greece	22,882	13,716	673	4,264	3,543	686	12,173	7,823
Hungary	1,990	1,492	100	217	99	82	1,743	1,362
Ireland	8,739	5,849	204	1,160	1,128	398	5,338	3,831
Italy	33,665	19,961	580	7,321	4,850	953	17,842	11,263
Malta	579	311	27	141	64	36	435	250
Netherlands	4,617	2,929	63	651	826	148	2,069	1,339
Norway	6,592	3,925	109	1,200	1,199	159	2,701	1,629

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J11—Number and total monthly benefits for beneficiaries in foreign countries, December 2006—Continued**

Region and country <sup>a</sup>	Number						Total monthly benefits (thousands of dollars)	
	All beneficiaries	Retired workers	Disabled workers	Widow(er)s <sup>b</sup>	Wives and husbands	Children	All beneficiaries	Retired workers
Poland	5,736	4,015	284	753	511	173	3,352	2,299
Portugal	12,214	8,438	641	1,557	1,248	330	6,898	4,962
Russia	543	435	35	32	33	8	351	283
Serbia	986	624	72	179	74	37	712	451
Spain	10,203	5,994	252	2,001	1,614	342	5,974	3,785
Sweden	3,693	2,448	80	427	601	137	1,608	1,046
Switzerland	6,681	4,538	59	733	1,215	136	2,824	1,977
United Kingdom	30,937	19,310	485	4,613	5,487	1,042	16,361	10,631
Other	2,169	1,370	67	356	278	98	1,557	1,060
Oceania	8,588	5,587	294	1,092	1,158	457	5,792	4,068
Australia	7,087	4,622	221	956	1,034	254	4,605	3,209
New Zealand	1,076	741	49	88	96	102	878	664
Other	425	224	24	48	28	101	309	195

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.

CONTACT: Shirley Turpin (410) 965-0181.

## 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 2006**

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	7,803,692	934.50	860.50	6,806,918	977.70	902.50	776,596	642.40	635.00	220,178	630.70	598.00
Alabama	203,244	906.80	836.00	178,375	951.40	876.00	17,608	585.40	561.00	7,261	592.40	567.00
Alaska	11,241	939.70	855.00	10,211	968.20	879.00	784	639.50	622.50	246	714.20	694.50
Arizona	138,450	978.60	909.00	125,727	1,010.70	942.00	9,464	663.00	662.00	3,259	659.20	621.00
Arkansas	122,869	889.70	833.50	109,118	930.30	871.50	9,558	566.40	544.00	4,193	570.40	549.00
California	649,734	955.70	877.00	570,084	996.40	920.50	64,926	661.20	658.00	14,724	679.00	645.00
Colorado	83,765	943.50	871.00	75,836	973.70	900.50	6,134	659.20	658.00	1,795	639.40	611.00
Connecticut	78,384	972.70	898.50	67,281	1,017.30	944.50	9,515	715.60	724.00	1,588	626.10	585.00
Delaware	24,172	991.50	919.50	21,685	1,027.10	957.50	1,953	697.70	703.00	534	620.40	592.50
District of Columbia	11,824	831.30	769.00	10,233	871.00	801.00	1,354	570.20	535.00	237	605.80	592.00
Florida	454,522	943.40	871.50	407,268	979.70	906.00	35,194	638.50	630.00	12,060	606.10	574.25
Georgia	234,091	918.50	856.00	205,249	964.40	899.50	21,130	599.60	572.00	7,712	570.40	538.00
Hawaii	22,087	961.80	891.00	19,203	1,006.80	943.50	2,372	657.40	650.00	512	682.30	651.50
Idaho	34,982	923.10	849.50	31,318	954.70	881.00	2,808	645.50	639.00	856	676.90	655.75
Illinois	271,527	956.20	880.00	231,633	1,002.20	926.00	32,455	695.00	701.50	7,439	664.30	634.00
Indiana	171,198	941.30	868.00	148,690	979.60	906.00	17,492	697.50	706.00	5,016	656.90	634.00
Iowa	72,078	898.60	828.00	61,782	937.50	866.75	8,572	675.20	675.00	1,724	615.70	603.00
Kansas	63,389	915.60	847.00	55,542	951.80	882.00	6,237	670.40	669.00	1,610	619.40	587.00
Kentucky	191,245	912.50	837.00	167,356	957.30	881.50	16,682	577.00	548.00	7,207	648.10	618.00
Louisiana	137,922	912.30	832.00	114,609	974.40	894.00	17,679	585.80	553.00	5,634	675.40	645.00
Maine	53,994	868.90	806.00	48,022	902.40	835.00	4,708	601.10	590.00	1,264	594.40	555.50
Maryland	107,941	966.20	895.50	94,524	1,007.40	938.50	10,980	679.80	675.50	2,437	659.00	628.00
Massachusetts	180,674	927.90	854.50	158,781	965.30	887.50	18,413	660.00	659.00	3,480	639.00	596.25
Michigan	292,279	990.80	907.00	250,351	1,036.20	958.00	33,661	719.90	730.50	8,267	716.20	694.00
Minnesota	108,414	930.50	853.00	94,885	968.30	890.00	11,692	671.50	671.00	1,837	628.70	599.00
Mississippi	126,517	871.60	812.00	109,531	921.40	854.50	12,164	539.90	500.00	4,822	577.70	545.00
Missouri	190,672	915.90	844.00	168,301	953.60	878.50	16,652	641.90	633.00	5,719	603.80	564.50
Montana	24,458	910.70	837.50	21,611	945.10	872.00	2,232	656.10	648.00	615	626.40	579.00
Nebraska	39,096	887.10	822.00	33,915	925.80	859.00	4,325	641.70	632.00	856	595.50	561.00
Nevada	50,894	1,011.10	943.00	46,966	1,037.60	969.00	2,708	700.30	694.75	1,220	677.60	644.00
New Hampshire	37,852	959.40	893.50	34,310	990.50	924.50	2,801	677.10	682.00	741	588.00	538.00
New Jersey	183,071	1,020.30	940.50	158,619	1,068.60	992.00	20,233	718.00	723.50	4,219	651.10	611.50
New Mexico	53,826	901.10	834.50	48,044	938.00	868.75	4,482	577.90	549.75	1,300	651.70	621.00
New York	486,363	978.50	892.50	416,715	1,028.30	947.00	57,409	688.20	694.00	12,239	643.40	611.00
North Carolina	294,566	916.10	863.50	261,068	959.60	903.50	24,548	593.80	569.00	8,950	530.40	494.00
North Dakota	13,888	858.20	788.25	11,604	905.30	836.75	1,984	624.60	608.00	300	581.10	558.50
Ohio	296,528	915.70	836.50	251,748	957.30	876.50	35,309	682.10	688.00	9,471	679.20	658.00
Oklahoma	110,302	914.10	848.50	97,042	954.50	889.50	9,580	617.50	597.00	3,680	620.70	585.50
Oregon	88,602	950.70	875.50	78,860	983.70	909.00	7,573	686.10	693.00	2,169	674.70	647.00
Pennsylvania	359,883	945.40	874.50	309,778	989.60	920.50	39,944	674.30	681.00	10,161	663.20	640.00
Rhode Island	33,615	908.60	837.50	29,721	944.80	868.00	3,183	642.40	639.50	711	590.00	555.00
South Carolina	154,916	925.50	872.00	135,892	973.20	916.50	13,737	599.40	572.00	5,287	547.10	522.00
South Dakota	17,532	855.70	788.50	15,038	898.30	830.25	2,101	604.90	584.00	393	569.00	541.00
Tennessee	217,492	899.00	836.50	190,539	942.50	876.00	19,071	598.50	572.00	7,882	575.50	546.00
Texas	469,863	924.20	856.00	410,912	968.00	899.00	43,738	611.60	588.00	15,213	640.60	611.50
Utah	36,627	935.20	848.00	32,274	969.70	883.50	3,602	679.10	681.00	751	683.90	662.00
Vermont	19,061	883.50	824.00	16,663	920.40	859.00	1,949	634.90	621.00	449	593.90	578.00
Virginia	197,516	940.70	874.50	173,734	984.70	918.00	17,871	618.70	602.00	5,911	621.30	591.00
Washington	145,932	959.60	877.50	130,146	992.00	909.00	12,480	692.50	702.00	3,306	693.20	672.50
West Virginia	97,109	968.00	889.50	83,143	1,024.90	958.00	10,091	600.30	584.50	3,875	704.10	686.00
Wisconsin	135,177	933.00	857.00	116,190	974.70	899.50	16,185	686.60	696.00	2,802	625.00	596.00
Wyoming	11,062	941.80	852.00	9,918	972.50	881.50	907	678.90	665.00	237	663.10	639.00

(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 2006—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	1,260	715.70	671.75	1,109	749.60	701.50	101	455.70	420.50	50	490.00	481.75
Guam	1,431	802.80	750.50	1,247	850.00	792.00	146	454.90	388.00	38	588.30	529.50
Northern Mariana Islands	252	582.70	565.00	196	651.50	615.50	47	337.30	279.00	9	365.20	340.00
Puerto Rico	167,771	769.20	732.50	139,966	836.20	779.20	22,716	410.90	373.00	5,089	528.00	504.00
Virgin Islands	1,989	905.30	840.50	1,621	984.40	925.00	306	535.80	521.25	62	663.10	647.25
Foreign countries	18,543	748.00	700.00	12,734	866.40	824.50	5,050	467.20	438.00	759	630.60	609.00

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Shirley Turpin (410) 965-0181.

## 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 2006**

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	49,122,624	955.50	41,221,183	83.9	989.20	7,901,441	16.1	779.80
Alabama	920,843	900.60	713,881	77.5	949.30	206,962	22.5	732.70
Alaska	66,906	905.10	56,856	85.0	934.60	10,050	15.0	738.10
Arizona	940,213	982.60	853,059	90.7	1,008.30	87,154	9.3	730.60
Arkansas	576,997	882.30	462,457	80.1	923.40	114,540	19.9	716.30
California	4,504,672	960.30	3,953,129	87.8	984.90	551,543	12.2	784.30
Colorado	600,316	953.30	526,407	87.7	976.70	73,909	12.3	786.40
Connecticut	587,292	1,062.30	486,293	82.8	1,091.00	100,999	17.2	924.20
Delaware	153,544	1,021.40	135,010	87.9	1,047.70	18,534	12.1	829.70
District of Columbia	71,231	842.20	56,593	79.4	876.80	14,638	20.6	708.40
Florida	3,444,546	967.60	3,124,348	90.7	990.40	320,198	9.3	745.40
Georgia	1,269,987	928.00	1,021,008	80.4	972.00	248,979	19.6	748.00
Hawaii	204,207	966.20	182,318	89.3	986.40	21,889	10.7	798.40
Idaho	233,766	939.20	208,062	89.0	960.40	25,704	11.0	768.30
Illinois	1,906,454	998.70	1,614,650	84.7	1,026.10	291,804	15.3	847.00
Indiana	1,080,547	1,002.10	903,512	83.6	1,032.10	177,035	16.4	849.10
Iowa	555,803	964.60	494,340	88.9	985.40	61,463	11.1	797.10
Kansas	454,919	984.40	394,926	86.8	1,009.90	59,993	13.2	816.50
Kentucky	812,644	886.20	597,507	73.5	940.00	215,137	26.5	736.90
Louisiana	722,643	870.30	545,967	75.6	922.00	176,676	24.4	710.40
Maine	275,175	886.70	227,077	82.5	917.50	48,098	17.5	741.30
Maryland	778,689	985.00	656,146	84.3	1,011.30	122,543	15.7	844.20
Massachusetts	1,072,305	971.30	884,023	82.4	1,000.40	188,282	17.6	835.00
Michigan	1,776,084	1,025.60	1,512,253	85.1	1,056.20	263,831	14.9	850.10
Minnesota	801,237	975.10	700,120	87.4	1,001.00	101,117	12.6	796.40
Mississippi	553,844	858.40	426,891	77.1	908.70	126,953	22.9	689.30
Missouri	1,077,060	941.10	895,328	83.1	973.30	181,732	16.9	782.30
Montana	172,920	922.60	150,078	86.8	947.20	22,842	13.2	761.00
Nebraska	293,935	950.00	257,445	87.6	974.10	36,490	12.4	780.10
Nevada	354,321	986.40	310,160	87.5	1,008.80	44,161	12.5	829.30
New Hampshire	226,313	993.10	193,759	85.6	1,020.20	32,554	14.4	832.00
New Jersey	1,381,151	1,070.60	1,165,367	84.4	1,096.40	215,784	15.6	931.50
New Mexico	319,935	884.50	272,225	85.1	923.40	47,710	14.9	662.90
New York	3,075,081	1,011.30	2,555,167	83.1	1,043.20	519,914	16.9	854.60
North Carolina	1,550,340	941.40	1,256,327	81.0	986.00	294,013	19.0	751.20
North Dakota	115,434	897.70	99,083	85.8	921.80	16,351	14.2	751.50
Ohio	1,976,174	964.80	1,598,252	80.9	997.00	377,922	19.1	828.50
Oklahoma	647,067	919.70	539,031	83.3	955.50	108,036	16.7	741.10
Oregon	630,822	982.80	576,918	91.5	999.60	53,904	8.5	802.00
Pennsylvania	2,438,397	990.90	2,035,585	83.5	1,017.20	402,812	16.5	857.90
Rhode Island	193,099	968.30	158,686	82.2	1,001.60	34,413	17.8	814.70
South Carolina	801,076	938.80	646,418	80.7	985.40	154,658	19.3	744.10
South Dakota	142,953	892.10	125,444	87.8	914.90	17,509	12.2	729.20
Tennessee	1,115,933	923.10	897,626	80.4	966.80	218,307	19.6	743.60
Texas	3,028,901	919.70	2,484,916	82.0	963.40	543,985	18.0	719.70
Utah	282,158	961.10	252,752	89.6	982.80	29,406	10.4	775.40
Vermont	114,559	950.40	96,594	84.3	979.60	17,965	15.7	793.90
Virginia	1,161,105	949.40	934,435	80.5	987.90	226,670	19.5	790.80
Washington	961,739	1,003.30	874,625	90.9	1,023.20	87,114	9.1	803.60
West Virginia	419,477	924.90	293,886	70.1	974.00	125,591	29.9	810.20
Wisconsin	966,818	994.10	852,739	88.2	1,015.90	114,079	11.8	831.10
Wyoming	82,748	967.90	72,205	87.3	991.70	10,543	12.7	805.20
Outlying areas								
Puerto Rico	723,203	632.40	468,684	64.8	706.60	254,519	35.2	495.80
Other <sup>a</sup>	505,041	557.90	420,615	83.3	561.60	84,426	16.7	539.40

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

a. Includes American Samoa, Guam, Northern Mariana Islands, Virgin Islands, and foreign countries.

CONTACT: Shirley Turpin (410) 965-0181.

## 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 2006**

Type of beneficiary and age	All beneficiaries	Beneficiaries with representative payee	
		Number	Percentage of all beneficiaries
Total <sup>a</sup>	49,122,624	5,142,701	10.5
Adult beneficiaries	45,989,224	2,011,417	4.4
Retired workers	30,976,143	437,195	1.4
Under 65	2,840,334	6,390	0.2
65–74	14,932,644	135,368	0.9
75–84	9,702,675	145,645	1.5
85 or older	3,500,490	149,792	4.3
Disabled workers	6,806,918	795,972	11.7
Under 35	426,429	135,636	31.8
35–44	984,172	174,687	17.7
45–54	2,083,967	255,108	12.2
55 or older	3,312,350	230,541	7.0
Wives and husbands	2,632,069	22,889	0.9
Under 65	404,170	2,850	0.7
65–74	1,272,958	9,558	0.8
75–84	816,369	7,544	0.9
85 or older	138,572	2,937	2.1
Widow(er)s <sup>b</sup>	4,452,647	131,096	2.9
Under 65	610,392	2,592	0.4
65–74	1,222,592	20,989	1.7
75–84	1,594,424	44,816	2.8
85 or older	1,025,239	62,699	6.1
Disabled widow(er)s	214,315	13,884	6.5
Under 55	28,571	2,081	7.3
55–64	185,744	11,803	6.4
Disabled adult children	776,596	606,180	78.1
Under 35	213,797	152,829	71.5
35–44	192,283	147,071	76.5
45–54	193,680	156,829	81.0
55 or older	176,836	149,451	84.5
Students aged 18–19	130,536	4,201	3.2
Children under age 18	3,133,398	3,131,284	99.9
In custody of parent payee	2,800,533	2,800,533	100.0
Not in custody of parent payee	332,865	330,751	99.4

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

a. Includes 2 special age-72 beneficiaries.

b. Includes nondisabled widow(er)s, widowed mothers and fathers, and parents.

CONTACT: Shirley Turpin (410) 965-0181.

## 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 1983–2006, selected years**

Year and country	Total	Retired workers	Disabled workers	Wives and husbands	Widow(er)s <sup>a</sup>	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
Australia	1,065	769	76	182	19	19
Austria	1,135	825	66	169	49	26
Belgium	711	492	5	138	64	12
Canada	45,840	28,853	1,367	9,567	5,588	465
Chile	86	66	<sup>b</sup>	15	<sup>b</sup>	<sup>b</sup>
Finland	247	177	13	43	9	5
France	4,204	3,013	37	747	336	71
Germany	18,921	14,046	580	2,993	1,097	205
Greece	3,172	2,183	140	571	230	48
Ireland	1,657	1,160	28	326	111	32
Italy	8,831	5,627	110	1,697	1,275	122
Japan	9,587	5,652	<sup>b</sup>	3,788	140	<sup>b</sup>
Korea	190	142	<sup>b</sup>	47	<sup>b</sup>	<sup>b</sup>
Luxembourg	55	31	8	9	<sup>b</sup>	<sup>b</sup>
Netherlands	2,520	1,783	7	538	166	26
Norway	3,738	2,436	88	758	416	40
Portugal	1,947	1,254	123	308	229	33
Spain	2,378	1,490	76	483	273	56
Sweden	1,955	1,450	35	362	77	31
Switzerland	3,878	2,828	40	767	203	40
United Kingdom	15,861	11,585	156	2,987	982	151

(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 1983–2006, selected years—*Continued***

Year and country	Total	Retired workers	Disabled workers	Wives and husbands	Widow(er)s <sup>a</sup>	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
Australia	196.08	201.02	438.49	82.92	228.32	78.16
Austria	206.89	231.78	303.63	68.52	175.69	129.69
Belgium	188.39	221.97	451.00	73.12	173.70	106.33
Canada	163.02	189.05	383.31	69.31	139.72	108.27
Chile	201.22	221.33	<sup>b</sup>	90.47	<sup>b</sup>	<sup>b</sup>
Finland	188.01	196.32	475.38	72.13	188.44	142.60
France	202.64	236.06	464.41	78.48	174.50	87.65
Germany	219.64	248.68	426.12	70.64	166.71	104.33
Greece	168.16	180.27	405.78	73.24	157.99	101.90
Ireland	204.53	232.24	663.14	81.02	197.49	81.66
Italy	175.99	208.90	520.52	71.88	146.39	105.46
Japan	199.65	255.06	<sup>b</sup>	115.00	256.46	<sup>b</sup>
Korea	221.30	254.45	<sup>b</sup>	118.85	<sup>b</sup>	<sup>b</sup>
Luxembourg	224.37	227.69	394.50	81.89	<sup>b</sup>	<sup>b</sup>
Netherlands	181.33	211.82	701.14	76.15	185.23	101.81
Norway	180.95	203.75	409.28	78.15	190.93	134.55
Portugal	188.86	196.36	462.82	74.47	164.03	122.45
Spain	169.36	193.82	390.75	70.33	160.39	115.84
Sweden	166.11	184.91	349.31	75.29	178.23	110.48
Switzerland	177.36	203.75	445.63	72.36	169.43	97.05
United Kingdom	232.24	273.93	467.79	80.73	183.99	100.70

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

- a. Includes nondisabled and disabled widow(er)s, mothers and fathers, and parents.
- b. Not shown to avoid disclosure of information regarding particular individuals.

CONTACT: Karyn Foley (410) 965-9047.



## Section 6. Old-Age, Survivors, and Disability Insurance

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### **Benefits Awarded**

Summary	6.1
Retired Workers	6.12
Disabled Workers	6.21
Dependents and Survivors	6.25

### **Benefits Withheld** **6.39**

### **Benefits Terminated** **6.43**





Table 6.A1—Number, by type of benefit, 1940–2006

Year	All benefits	Retired workers	Disabled workers	Wives and husbands of—		Children of—			Widowed mothers and fathers	Widow(ers)	Parents	Special age-72 beneficiaries
				Retired workers	Disabled workers	Retired workers	Deceased workers	Disabled workers				
Total	203,683,646	84,032,299	23,024,603	19,162,424	3,889,750	7,497,840	21,884,929	15,997,369	4,896,816	21,915,786	114,396	1,267,434
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 <sup>a</sup>	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 <sup>b</sup>	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	748,539
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	273,567
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	81,030
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	45,027
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	29,881
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	24,965
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	20,367
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	15,111
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	6,660
1975	4,427,138	1,505,750	592,049	350,558	148,741	225,579	591,118	515,216	116,224	377,246	969	3,688
1976	4,351,654	1,475,773	551,460	346,623	147,407	236,805	578,905	511,487	113,520	385,373	914	3,387
1977	4,610,730	1,593,631	568,874	390,874	151,938	259,447	587,589	518,477	118,821	416,735	870	3,474
1978	4,166,571	1,472,786	464,415	346,956	130,161	214,284	566,992	453,382	110,015	403,679	844	3,057
1979	4,229,286	1,590,854	416,713	358,163	113,243	247,800	544,549	399,172	110,424	445,555	788	2,025
1980	4,214,567	1,612,669	396,559	360,693	108,500	248,658	540,246	385,208	107,809	452,156	724	1,345
1981	4,029,827	1,578,990	351,847	338,540	95,575	211,406	535,487	339,654	99,653	477,121	606	948
1982	3,840,579	1,618,411	297,131	349,967	77,835	182,849	473,396	260,470	86,786	492,451	498	785
1983	3,755,994	1,669,738	311,549	356,274	80,079	144,945	380,992	226,895	82,464	501,688	431	939
1984	3,690,103	1,607,370	361,998	342,691	81,834	131,986	351,326	238,252	73,794	499,677	383	792
1985	3,796,394	1,690,490	377,371	356,558	83,511	128,076	332,531	253,025	72,241	501,673	381	537
1986	3,853,454	1,734,248	416,865	358,115	82,435	122,652	319,808	258,167	69,340	491,052	344	428
1987	3,733,853	1,681,716	415,848	333,333	77,316	117,984	310,573	256,742	64,777	475,035	286	243
1988	3,680,969	1,654,068	409,490	316,929	73,790	116,659	324,346	265,026	62,676	457,574	263	148
1989	3,646,349	1,656,744	425,582	310,498	69,113	106,491	307,484	261,387	59,525	449,139	281	105
1990	3,716,924	1,664,754	467,977	308,980	69,667	108,105	303,616	283,586	58,060	451,862	233	84
1991	3,865,426	1,695,346	536,434	307,000	72,754	107,261	301,459	318,188	57,896	468,788	246	54
1992	4,050,849	1,707,949	636,637	304,764	78,083	108,686	304,300	381,585	56,402	472,078	298	67
1993	4,001,201	1,661,281	635,238	290,728	74,605	106,566	311,290	398,598	56,408	466,198	238	51
1994	3,940,342	1,625,347	631,870	275,025	69,549	102,983	310,051	411,205	54,732	459,340	213	27

(Continued)

## 6.A OASDI Benefits Awarded: Summary

**Table 6.A1—Number, by type of benefit, 1940–2006—Continued**

Year	All benefits	Retired workers	Disabled workers	Wives and husbands of—		Children of—			Widowed mothers and fathers	Widow(ers)	Parents	Special age-72 beneficiaries
				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	28
1996	3,793,238	1,581,452	624,335	244,014	57,528	98,655	302,480	397,350	49,150	438,081	177	16
1997	3,865,966	1,718,623	587,417	268,012	50,818	97,594	297,204	362,548	43,504	440,076	157	13
1998	3,800,259	1,631,511	608,131	263,668	47,550	96,893	294,851	371,426	42,395	443,669	152	13
1999	3,917,099	1,690,024	620,488	275,568	46,164	99,826	295,196	378,144	41,756	469,806	118	9
2000	4,290,080	1,960,649	621,650	341,503	43,941	115,358	297,686	363,632	40,491	505,021	135	14
2001	4,161,971	1,779,228	691,309	314,547	43,412	110,680	302,445	383,049	41,323	495,848	129	1
2002	4,335,714	1,812,551	750,003	317,685	45,600	116,186	310,395	419,780	40,829	522,537	139	9
2003	4,321,778	1,791,316	777,461	305,831	47,183	111,992	305,409	434,953	39,206	508,306	121	0
2004	4,458,816	1,883,060	795,775	319,430	48,016	115,391	309,472	433,699	40,030	513,839	104	0
2005	4,672,152	2,000,157	829,687	329,225	50,187	123,494	314,786	469,267	38,248	516,949	152	0
2006	4,621,110	1,999,019	798,675	328,430	49,521	126,860	321,155	449,020	35,981	512,320	129	0

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.

... = not applicable.

- a. January–November.
- b. Includes December 1958.

CONTACT: Jennie H. Park (410) 965-9358.

**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 1940–2006 (in dollars)**

Year <sup>a</sup>	Average primary insurance amount for retired workers (dollars)			Average monthly benefit (dollars)						
				Retired workers			Disabled workers			Non-disabled widows
	All	Men	Women	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

(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 1940–2006 (in dollars)—Continued**

Year <sup>a</sup>	Average primary insurance amount for retired workers (dollars)			Average monthly benefit (dollars)						Non-disabled widows
	All	Men	Women	Retired workers			Disabled workers			
				All	Men	Women	All	Men	Women	
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
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

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.

CONTACT: Jennie H. Park (410) 965-9358.

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, 2006**

Age and basis of entitlement	All races <sup>a</sup>		White		Black		Other	
	Number	Average monthly benefit <sup>b</sup> (dollars)	Number	Average monthly benefit <sup>b</sup> (dollars)	Number	Average monthly benefit <sup>b</sup> (dollars)	Number	Average monthly benefit <sup>b</sup> (dollars)
<b>Retired workers <sup>c</sup></b>								
Total	1,991,000	1,055.40	1,644,300	1,092.00	192,600	954.50	150,200	794.20
62–64	1,250,900	950.00	1,054,200	975.50	115,700	875.90	80,600	725.20
65–69	696,800	1,251.50	560,600	1,311.60	73,300	1,082.70	60,800	912.90
70 or older	43,300	944.80	29,500	1,080.30	3,600	870.20	8,800	606.60
<i>Men</i>								
Subtotal	1,046,500	1,233.40	865,300	1,296.20	96,600	1,033.40	83,300	820.50
62–64	631,700	1,125.30	529,200	1,173.40	61,000	939.00	41,300	787.90
65–69	400,300	1,421.50	328,500	1,500.20	34,800	1,201.50	36,200	925.40
70 or older	14,500	749.80	7,600	1,024.70	800	913.90	5,800	397.70
<i>Women</i>								
Subtotal	944,500	858.20	779,000	865.10	96,000	875.10	66,900	761.60
62–64	619,200	771.20	525,000	776.00	54,700	805.50	39,300	659.40
65–69	296,500	1,022.00	232,100	1,044.70	38,500	975.30	24,600	894.50
70 or older	28,800	1,043.00	21,900	1,099.70	2,800	857.70	3,000	1,010.60
<b>Disabled workers</b>								
Total	794,800	1,028.60	528,500	1,094.50	137,000	911.10	115,500	918.70
Under 30	48,500	606.40	28,000	623.30	9,100	595.70	8,200	614.10
30–39	84,400	829.80	53,300	858.60	15,200	808.00	12,200	825.90
40–49	182,400	971.60	114,900	1,039.70	39,300	840.70	26,000	898.90
50–54	156,500	1,048.30	101,200	1,127.50	28,100	906.00	25,300	916.20
55–59	184,600	1,158.20	127,700	1,196.10	28,100	1,102.80	27,100	1,060.70
60 or older	138,400	1,178.00	103,400	1,246.90	17,200	1,025.00	16,700	940.10
<i>Men</i>								
Subtotal	419,800	1,161.20	290,800	1,245.10	65,600	988.40	56,300	997.20
Under 30	25,000	624.50	14,400	635.90	4,300	619.40	4,600	619.80
30–39	40,600	856.60	24,000	907.10	7,600	804.90	6,700	848.60
40–49	94,400	1,059.80	62,300	1,135.50	18,200	896.20	12,800	954.10
50–54	79,100	1,181.80	55,100	1,288.70	12,800	965.30	10,200	922.70
55–59	101,500	1,331.00	73,700	1,369.30	13,500	1,218.20	13,700	1,261.30
60 or older	79,200	1,369.30	61,300	1,443.50	9,200	1,189.50	8,300	1,048.60
<i>Women</i>								
Subtotal	375,000	880.30	237,700	910.30	71,400	840.10	59,200	844.00
Under 30	23,500	587.10	13,600	610.00	4,800	574.40	3,600	606.80
30–39	43,800	805.10	29,300	818.80	7,600	811.00	5,500	798.40
40–49	88,000	876.90	52,600	926.30	21,100	792.90	13,200	845.40
50–54	77,400	911.80	46,100	934.80	15,300	856.40	15,100	911.90
55–59	83,100	947.20	54,000	959.70	14,600	996.10	13,400	855.60
60 or older	59,200	922.00	42,100	960.70	8,000	835.70	8,400	832.80
<b>Wives</b>								
Total	232,400	452.70	186,300	482.50	18,700	387.20	26,400	294.60
<i>Wives of retired workers</i>								
Subtotal	191,900	492.30	155,700	522.00	13,800	438.70	21,700	316.30
Entitlement based on care of children	10,900	454.50	8,400	460.00	1,200	478.20	1,300	397.10
Entitlement based on age	181,000	494.50	147,300	525.50	12,600	435.00	20,400	311.10
62–64	122,600	479.40	103,400	505.20	7,500	402.00	11,200	297.50
65–69	47,200	552.40	35,600	599.30	4,000	515.80	7,500	345.50
70 or older	11,200	416.70	8,300	462.70	1,100	365.80	1,700	249.60
<i>Wives of disabled workers</i>								
Subtotal	40,500	265.20	30,600	281.90	4,900	242.20	4,700	194.50
Entitlement based on care of children	15,000	193.20	9,600	216.20	2,700	145.40	2,400	172.80
Entitlement based on age	25,500	307.60	21,000	311.90	2,200	361.00	2,300	217.20

(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, 2006—Continued**

Age and basis of entitlement	All races <sup>a</sup>		White		Black		Other	
	Number	Average monthly benefit <sup>b</sup> (dollars)	Number	Average monthly benefit <sup>b</sup> (dollars)	Number	Average monthly benefit <sup>b</sup> (dollars)	Number	Average monthly benefit <sup>b</sup> (dollars)
<b>Husbands</b>								
Total	14,900	278.90	9,200	312.10	2,000	291.40	3,400	186.10
Husbands of retired workers	12,100	296.90	7,500	1,369.30	1,600	301.60	2,700	213.70
Husbands of disabled workers	2,800	201.20	1,700	239.80	400	<sup>d</sup>	700	79.40
<b>Children</b>								
Total	813,100	469.40	492,400	496.40	151,800	383.70	161,500	472.00
By age								
Under age 18	538,400	416.70	315,600	439.00	99,500	330.50	118,900	434.10
Disabled, aged 18 or older	44,200	451.40	27,800	448.30	8,800	414.00	6,900	514.60
Students aged 18–19	230,500	596.10	149,000	627.20	43,500	499.40	35,700	589.90
By basis of entitlement								
Children of retired workers	118,200	504.10	83,900	528.70	23,900	482.20	9,700	362.50
Children of deceased workers	299,900	703.30	157,400	782.90	48,800	562.40	91,000	642.20
Children of disabled workers	395,000	281.50	251,100	306.10	79,100	243.80	60,800	234.70
<b>Widowed mothers and fathers</b>								
Total	32,600	761.30	20,900	812.60	2,100	673.20	9,600	668.90
By age								
Under 30	3,600	637.20	2,300	679.50	400	<sup>d</sup>	900	648.80
30–39	9,300	718.40	5,400	745.10	500	530.90	3,400	703.50
40–49	13,600	824.70	9,200	878.30	500	937.00	3,900	684.00
50–59	5,700	755.40	3,700	820.60	700	761.00	1,300	566.80
60 or older	400	<sup>d</sup>	300	<sup>d</sup>	...	...	100	<sup>d</sup>
By basis of entitlement								
Widowed mothers	29,200	785.40	18,600	847.10	2,100	673.20	8,500	678.10
Widowed fathers	3,400	554.30	2,300	533.20	...	...	1,100	598.40
<b>Nondisabled widow(er)s</b>								
Total	317,200	1,022.90	181,000	1,077.20	20,600	840.30	115,000	967.40
By age								
60–64	140,900	995.50	45,300	1,042.80	6,200	900.00	89,300	978.70
65–69	55,700	937.80	33,400	932.80	7,500	699.80	14,600	1,070.00
70–74	28,800	1,034.90	21,900	1,108.40	2,700	883.60	4,200	748.80
75 or older	91,800	1,113.00	80,400	1,148.10	4,200	975.20	6,900	736.40
By basis of entitlement								
Widows	297,800	1,041.40	175,000	1,088.10	19,200	846.00	103,000	995.40
Widowers	19,400	739.70	6,000	760.60	1,400	761.80	12,000	726.70

(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, 2006—Continued**

Age and basis of entitlement	All races <sup>a</sup>		White		Black		Other	
	Number	Average monthly benefit <sup>b</sup> (dollars)	Number	Average monthly benefit <sup>b</sup> (dollars)	Number	Average monthly benefit <sup>b</sup> (dollars)	Number	Average monthly benefit <sup>b</sup> (dollars)
<b>Disabled widow(er)s</b>								
Total	28,200	638.80	7,700	608.30	2,100	572.00	18,200	661.20
By age								
50–54	11,000	640.90	3,200	589.50	1,100	643.10	6,600	662.20
55–59	14,700	629.50	3,200	615.90	900	491.20	10,500	650.40
60 or older	2,500	684.50	1,300	635.80	100	<sup>d</sup>	1,100	757.30
By basis of entitlement								
Widows	26,200	653.10	7,300	610.70	2,100	572.00	16,600	684.00
Widowers	2,000	452.00	400	<sup>d</sup>	...	...	1,600	424.00

SOURCE: Social Security Administration, Master Beneficiary Record, 1 percent sample.

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.

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. Includes 3,900 persons of unknown race.
- b. Benefits awarded before the December increase are converted to the December rates before computation of the averages.
- 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.

CONTACT: Diane Wallace (410) 965-0165.

## 6.A OASDI Benefits Awarded: Summary

**Table 6.A4—Number and average monthly benefit for retired and disabled workers, by age in month of award and sex, 2006**

Age	Total		Men		Women	
	Number	Average monthly benefit <sup>a</sup> (dollars)	Number	Average monthly benefit <sup>a</sup> (dollars)	Number	Average monthly benefit <sup>a</sup> (dollars)
<b>Retired workers</b>						
Total <sup>b</sup>	1,999,019	1,053.60	1,056,822	1,235.00	942,197	850.20
62–64	1,291,224	953.50	659,324	1,130.70	631,900	768.50
62	954,026	906.30	481,482	1,078.30	472,544	731.10
63	151,766	1,042.00	80,990	1,220.50	70,776	837.60
64	185,432	1,123.70	96,852	1,316.60	88,580	912.80
65–69	676,113	1,250.70	387,921	1,426.10	288,192	1,014.50
65	622,751	1,266.70	364,895	1,447.40	257,856	1,011.00
Disability conversions	227,217	1,072.80	128,211	1,260.90	99,006	829.30
New entitlements	395,534	1,378.10	236,684	1,548.50	158,850	1,124.30
66	19,610	1,122.20	10,445	1,214.70	9,165	1,016.70
67	13,230	1,045.10	5,612	1,054.30	7,618	1,038.30
68	10,095	1,005.10	3,672	934.20	6,423	1,045.50
69	10,427	1,032.10	3,297	920.50	7,130	1,083.70
70–74	25,704	985.30	7,154	731.20	18,550	1,083.20
75 or older	5,978	691.70	2,423	486.50	3,555	831.60
<b>Disabled workers</b>						
Total	798,675	1,030.90	425,285	1,164.50	373,390	878.60
Under 25	33,694	536.60	19,541	543.90	14,153	526.50
25–29	29,547	745.40	15,247	769.40	14,300	719.80
30–34	38,753	828.60	19,138	871.40	19,615	786.90
35–39	56,958	884.50	28,474	951.80	28,484	817.20
40–44	85,525	945.30	42,962	1,044.20	42,563	845.50
45–49	110,062	1,017.50	55,691	1,143.50	54,371	888.50
50–54	149,276	1,082.20	77,505	1,230.10	71,771	922.50
50	34,567	1,038.90	17,791	1,182.40	16,776	886.60
51	28,587	1,072.60	14,709	1,215.90	13,878	920.60
52	28,559	1,089.20	14,753	1,236.50	13,806	931.80
53	28,410	1,105.80	14,890	1,256.20	13,520	940.30
54	29,153	1,113.00	15,362	1,267.30	13,791	941.00
55–59	181,770	1,159.60	100,389	1,334.20	81,381	944.20
55	40,456	1,127.50	22,239	1,287.70	18,217	932.10
56	34,396	1,153.90	18,781	1,320.80	15,615	953.10
57	35,642	1,161.00	19,443	1,342.00	16,199	943.70
58	36,225	1,169.60	19,956	1,352.20	16,269	945.70
59	35,051	1,190.50	19,970	1,373.20	15,081	948.50
60–65	113,090	1,198.80	66,338	1,376.20	46,752	947.00
60	33,521	1,196.20	19,197	1,382.20	14,324	946.90
61	28,749	1,199.20	16,736	1,378.70	12,013	949.20
62	23,603	1,211.40	13,926	1,391.40	9,677	952.30
63	15,927	1,198.90	9,564	1,366.10	6,363	947.50
64	8,836	1,185.80	5,401	1,344.00	3,435	937.10
65	2,454	1,155.10	1,514	1,313.00	940	900.70

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: 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. Benefits awarded before the December increase are converted to the December rates before computation of the averages.  
 b. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

CONTACT: Jennie H. Park (410) 965-9358.



**Table 6.A5—Number and average monthly benefit with reduction for early retirement, by type of benefit, age in month of award, and sex, 2006**

Age	Total		Men		Women	
	Number	Average monthly benefit <sup>a</sup> (dollars)	Number	Average monthly benefit <sup>a</sup> (dollars)	Number	Average monthly benefit <sup>a</sup> (dollars)
<b>Retired workers</b>						
Total	1,492,716	997.10	773,622	1,177.80	719,094	802.60
62	954,026	906.30	481,482	1,078.30	472,544	731.10
63	151,766	1,042.00	80,990	1,220.50	70,776	837.60
64	185,059	1,123.70	96,609	1,316.90	88,450	912.80
65	201,792	1,276.20	114,535	1,448.90	87,257	1,049.60
Disability conversions	19,712	1,155.10	11,740	1,332.00	7,972	894.60
New entitlements	182,080	1,289.40	102,795	1,462.20	79,285	1,065.20
66 or older	73	854.90	6	647.90	67	873.40
<b>Disabled workers</b>						
Total	29,944	1,165.60	17,962	1,338.40	11,982	906.50
62	13,442	1,176.80	7,867	1,364.30	5,575	912.30
63	9,614	1,164.60	5,856	1,330.60	3,758	906.00
64	5,563	1,143.90	3,436	1,299.80	2,127	892.00
65	1,325	1,150.40	803	1,308.00	522	907.80
<b>Wives and husbands</b>						
Total	282,431	374.40	7,584	269.50	274,847	377.30
<i>By basis of entitlement</i>						
Wives and husbands of retired workers	253,199	382.00	6,579	275.30	246,620	384.80
Wives and husbands of disabled workers	29,232	309.30	1,005	232.10	28,227	312.00
<i>By sex</i>						
Wives	274,847	377.30	...	...	274,847	377.30
62	164,381	360.90	...	...	164,381	360.90
63	38,091	354.70	...	...	38,091	354.70
64	47,165	423.00	...	...	47,165	423.00
65	24,324	437.60	...	...	24,324	437.60
66	184	310.20	...	...	184	310.20
67 or older	702	324.10	...	...	702	324.10
Husbands	7,584	269.50	7,584	269.50	...	...
<b>Nondisabled widow(er)s</b>						
Total	189,486	930.40	14,171	763.40	175,315	943.90
Nondisabled widows	175,315	943.90	...	...	175,315	943.90
60	67,150	988.20	...	...	67,150	988.20
61	22,417	1,011.20	...	...	22,417	1,011.20
62	20,978	968.40	...	...	20,978	968.40
63	17,060	944.00	...	...	17,060	944.00
64	20,951	988.60	...	...	20,951	988.60
65	23,288	761.10	...	...	23,288	761.10
66	239	526.80	...	...	239	526.80
67–69	613	469.40	...	...	613	469.40
70 or older	2,619	452.50	...	...	2,619	452.50
Nondisabled widowers	14,171	763.40	14,171	763.40	...	...

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. Benefits awarded before the December increase are converted to the December rates before computation of the averages.

CONTACT: Jennie H. Park (410) 965-9358.

## 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, 2006**

State or area	Retired workers			Disabled workers		
	Number	Percent	Average monthly benefit <sup>a</sup> (dollars)	Number	Percent	Average monthly benefit <sup>a</sup> (dollars)
All areas <sup>b</sup>	1,999,019	100.0	1,053.60	798,675	100.0	1,030.90
Alabama	33,170	1.7	1,029.10	20,574	2.6	1,014.80
Alaska	3,594	0.2	1,000.00	1,450	0.2	1,038.80
Arizona	39,331	2.0	1,072.00	12,120	1.5	1,059.00
Arkansas	21,392	1.1	993.60	12,481	1.6	981.70
California	196,153	9.8	1,034.80	69,175	8.7	970.90
Colorado	27,734	1.4	1,040.70	8,540	1.1	1,064.40
Connecticut	23,976	1.2	1,170.80	7,970	1.0	1,107.10
Delaware	6,282	0.3	1,130.40	2,404	0.3	1,090.90
District of Columbia	3,112	0.2	977.70	1,587	0.2	912.20
Florida	136,714	6.8	1,027.10	44,955	5.6	1,027.60
Georgia	57,160	2.9	1,047.80	22,030	2.8	1,038.00
Hawaii	9,587	0.5	1,047.40	2,442	0.3	1,052.60
Idaho	10,184	0.5	1,012.30	3,749	0.5	998.50
Illinois	77,660	3.9	1,077.90	29,023	3.6	1,072.60
Indiana	44,179	2.2	1,117.70	17,852	2.2	1,069.60
Iowa	21,517	1.1	1,064.30	6,605	0.8	1,014.20
Kansas	17,684	0.9	1,083.60	6,262	0.8	1,034.30
Kentucky	28,909	1.4	997.40	17,511	2.2	1,001.30
Louisiana	25,932	1.3	976.10	14,164	1.8	989.80
Maine	10,292	0.5	971.30	4,697	0.6	965.10
Maryland	35,069	1.8	1,097.70	12,785	1.6	1,067.70
Massachusetts	39,667	2.0	1,081.50	18,612	2.3	1,030.40
Michigan	73,027	3.7	1,161.70	30,193	3.8	1,090.90
Minnesota	34,105	1.7	1,108.00	12,079	1.5	1,038.80
Mississippi	19,665	1.0	992.40	10,860	1.4	993.30
Missouri	41,642	2.1	1,041.20	19,265	2.4	1,015.40
Montana	7,370	0.4	994.70	2,524	0.3	983.20
Nebraska	11,511	0.6	1,048.60	3,868	0.5	1,018.10
Nevada	17,787	0.9	1,036.50	5,667	0.7	1,085.30
New Hampshire	9,878	0.5	1,119.60	4,645	0.6	1,054.70
New Jersey	58,290	2.9	1,176.60	19,735	2.5	1,160.70
New Mexico	13,173	0.7	980.50	5,885	0.7	945.80
New York	124,321	6.2	1,114.50	49,518	6.2	1,089.80
North Carolina	64,633	3.2	1,053.40	28,116	3.5	1,036.70
North Dakota	4,411	0.2	991.90	1,540	0.2	964.00
Ohio	75,351	3.8	1,065.40	29,348	3.7	1,016.20
Oklahoma	25,567	1.3	1,007.80	13,035	1.6	979.30
Oregon	27,757	1.4	1,048.70	8,943	1.1	1,067.50
Pennsylvania	88,886	4.4	1,101.70	39,667	5.0	1,027.40
Rhode Island	6,904	0.3	1,081.10	3,175	0.4	1,000.80
South Carolina	34,260	1.7	1,053.60	13,352	1.7	1,043.20
South Dakota	5,554	0.3	992.80	1,562	0.2	952.40
Tennessee	45,193	2.3	1,040.70	21,251	2.7	1,017.00
Texas	125,109	6.3	1,017.40	57,447	7.2	1,005.60
Utah	11,874	0.6	1,050.50	4,534	0.6	1,029.20

(Continued)

**Table 6.A6—Number, percentage distribution, and average monthly benefit for retired and disabled workers, by state or other area, 2006—Continued**

State or area	Retired workers			Disabled workers		
	Number	Percent	Average monthly benefit <sup>a</sup> (dollars)	Number	Percent	Average monthly benefit <sup>a</sup> (dollars)
Vermont	4,895	0.2	1,060.30	1,938	0.2	974.70
Virginia	49,895	2.5	1,078.80	20,738	2.6	1,034.30
Washington	43,642	2.2	1,104.30	16,765	2.1	1,065.10
West Virginia	13,751	0.7	1,039.10	8,761	1.1	1,039.70
Wisconsin	39,289	2.0	1,101.50	14,160	1.8	1,060.40
Wyoming	3,677	0.2	1,052.00	1,137	0.1	1,029.20
Outlying areas						
Puerto Rico	23,655	1.2	700.40	10,493	1.3	896.40
Other <sup>c</sup>	24,649	1.2	509.90	1,486	0.2	813.80

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: 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. Benefits awarded before the December increase are converted to the December rates before computation of the averages.
- b. Includes beneficiaries with state code unknown.
- c. Includes American Samoa, Guam, Northern Mariana Islands, Virgin Islands, and foreign countries.

CONTACT: Diane Wallace (410) 965-0165.

## 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 in month of award, 2006**

Age	All initial awards <sup>a</sup>	Benefits received for all entitlement months <sup>b</sup>	Benefits withheld due to earnings for—		
			All entitlement months	One-half or more of entitlement months	Less than one-half of entitlement months
<b>Number</b>					
<i>All beneficiaries</i>					
Total	1,224,100	1,149,600	28,900	19,400	17,500
62	905,900	862,400	17,000	10,900	10,100
63	154,500	140,900	5,000	3,500	3,300
64	163,700	146,300	6,900	5,000	4,100
<i>Men</i>					
Subtotal	615,100	572,600	16,100	10,200	10,200
62	450,800	425,900	9,600	6,200	5,600
63	80,600	72,500	2,900	1,500	2,200
64	83,700	74,200	3,600	2,500	2,400
<i>Women</i>					
Subtotal	609,000	577,000	12,800	9,200	7,300
62	455,100	436,500	7,400	4,700	4,500
63	73,900	68,400	2,100	2,000	1,100
64	80,000	72,100	3,300	2,500	1,700
<b>Average primary insurance amount<sup>c</sup> (dollars)</b>					
<i>All beneficiaries</i>					
Total	1,180.30	1,173.20	1,313.60	1,311.30	1,320.10
62	1,168.90	1,165.40	1,248.30	1,273.70	1,270.80
63	1,215.90	1,200.20	1,494.60	1,231.90	1,451.30
64	1,210.20	1,193.40	1,343.40	1,448.90	1,336.00
<i>Men</i>					
Subtotal	1,426.90	1,424.10	1,489.10	1,541.70	1,504.40
62	1,419.00	1,420.40	1,398.90	1,467.00	1,467.10
63	1,453.00	1,440.90	1,696.00	1,546.90	1,554.10
64	1,444.10	1,428.80	1,563.30	1,723.90	1,546.10
<i>Women</i>					
Subtotal	931.30	924.20	1,092.80	1,055.80	1,062.60
62	921.10	916.50	1,052.90	1,018.60	1,026.60
63	957.40	945.00	1,216.50	995.60	1,245.80
64	965.50	951.10	1,103.60	1,173.90	1,039.40
<b>Average monthly benefit<sup>c</sup> (dollars)</b>					
<i>All beneficiaries</i>					
Total	951.80	944.90	1,073.30	1,088.40	1,079.30
62	907.80	905.70	955.50	978.50	972.80
63	1,021.60	1,008.80	1,238.20	1,044.60	1,219.10
64	1,129.50	1,114.70	1,244.20	1,358.60	1,229.30
<i>Men</i>					
Subtotal	1,125.30	1,120.50	1,209.90	1,260.00	1,222.80
62	1,075.50	1,076.30	1,063.60	1,115.70	1,114.20
63	1,200.10	1,189.40	1,407.30	1,287.00	1,296.90
64	1,321.70	1,306.60	1,441.00	1,601.80	1,408.40
<i>Women</i>					
Subtotal	776.60	770.70	901.60	898.10	878.80
62	741.80	739.20	815.30	797.40	796.80
63	826.80	817.40	1,004.70	862.90	1,063.50
64	928.40	917.10	1,029.50	1,115.40	976.40

SOURCE: Social Security Administration, Master Beneficiary Record.

NOTE: Excludes persons whose benefits were converted from disabled worker to retired worker in 2006. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

- a. Includes 8,700 awards for which benefits were withheld for reasons other than earnings.
- b. Months of entitlements begin with the month of award and end either in December 2006 or the month before the retired-worker benefit is terminated.
- c. Amount for December 2006 or the amount for the latest month of entitlement multiplied by the December benefit increase.

CONTACT: Diane Wallace (410) 965-0165.

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, 2006**

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	1,999,019	100.0	506,303	100.0	1,492,716	100.0
Less than 500.00	251,244	12.6	47,673	9.4	203,571	13.6
500.00–549.90	62,470	3.1	8,855	1.7	53,615	3.6
550.00–599.90	67,937	3.4	11,099	2.2	56,838	3.8
600.00–649.90	78,412	3.9	13,947	2.8	64,465	4.3
650.00–699.90	81,790	4.1	14,778	2.9	67,012	4.5
700.00–749.90	83,346	4.2	15,645	3.1	67,701	4.5
750.00–799.90	72,441	3.6	15,277	3.0	57,164	3.8
800.00–849.90	67,719	3.4	15,503	3.1	52,216	3.5
850.00–899.90	67,243	3.4	15,682	3.1	51,561	3.5
900.00–949.90	65,192	3.3	15,898	3.1	49,294	3.3
950.00–999.90	64,240	3.2	15,876	3.1	48,364	3.2
1,000.00–1,049.90	61,826	3.1	15,793	3.1	46,033	3.1
1,050.00–1,099.90	61,912	3.1	15,838	3.1	46,074	3.1
1,100.00–1,149.90	60,071	3.0	15,285	3.0	44,786	3.0
1,150.00–1,199.90	57,977	2.9	15,097	3.0	42,880	2.9
1,200.00–1,249.90	57,054	2.9	14,681	2.9	42,373	2.8
1,250.00–1,299.90	63,900	3.2	14,221	2.8	49,679	3.3
1,300.00–1,349.90	79,366	4.0	14,159	2.8	65,207	4.4
1,350.00–1,399.90	78,101	3.9	13,469	2.7	64,632	4.3
1,400.00–1,449.90	70,884	3.5	13,352	2.6	57,532	3.9
1,450.00–1,499.90	70,011	3.5	14,600	2.9	55,411	3.7
1,500.00–1,549.90	60,025	3.0	13,553	2.7	46,472	3.1
1,550.00–1,599.90	44,648	2.2	12,530	2.5	32,118	2.2
1,600.00–1,649.90	32,943	1.6	11,810	2.3	21,133	1.4
1,650.00–1,699.90	32,253	1.6	11,238	2.2	21,015	1.4
1,700.00–1,749.90	33,315	1.7	14,633	2.9	18,682	1.3
1,750.00–1,799.90	29,463	1.5	13,519	2.7	15,944	1.1
1,800.00–1,849.90	25,684	1.3	12,457	2.5	13,227	0.9
1,850.00–1,899.90	22,936	1.1	11,908	2.4	11,028	0.7
1,900.00–1,949.90	20,525	1.0	11,139	2.2	9,386	0.6
1,950.00–1,999.90	19,456	1.0	11,179	2.2	8,277	0.6
2,000.00 or more	54,635	2.7	45,609	9.0	9,026	0.6
Average benefit (dollars)	1,053.60		1,220.40		997.10	

(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, 2006—Continued**

Sex and monthly benefit (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Men	1,056,822	100.0	283,200	100.0	773,622	100.0
Less than 500.00	92,341	8.7	22,301	7.9	70,040	9.1
500.00–549.90	17,522	1.7	2,797	1.0	14,725	1.9
550.00–599.90	18,439	1.7	3,256	1.1	15,183	2.0
600.00–649.90	20,521	1.9	4,271	1.5	16,250	2.1
650.00–699.90	20,843	2.0	4,651	1.6	16,192	2.1
700.00–749.90	22,036	2.1	5,030	1.8	17,006	2.2
750.00–799.90	22,316	2.1	5,095	1.8	17,221	2.2
800.00–849.90	23,347	2.2	5,309	1.9	18,038	2.3
850.00–899.90	24,899	2.4	5,601	2.0	19,298	2.5
900.00–949.90	26,033	2.5	5,788	2.0	20,245	2.6
950.00–999.90	27,902	2.6	6,221	2.2	21,681	2.8
1,000.00–1,049.90	28,909	2.7	6,575	2.3	22,334	2.9
1,050.00–1,099.90	30,658	2.9	6,863	2.4	23,795	3.1
1,100.00–1,149.90	31,705	3.0	7,001	2.5	24,704	3.2
1,150.00–1,199.90	32,475	3.1	7,267	2.6	25,208	3.3
1,200.00–1,249.90	33,905	3.2	7,384	2.6	26,521	3.4
1,250.00–1,299.90	41,181	3.9	7,573	2.7	33,608	4.3
1,300.00–1,349.90	55,964	5.3	8,041	2.8	47,923	6.2
1,350.00–1,399.90	58,460	5.5	7,944	2.8	50,516	6.5
1,400.00–1,449.90	55,127	5.2	8,308	2.9	46,819	6.1
1,450.00–1,499.90	56,709	5.4	9,754	3.4	46,955	6.1
1,500.00–1,549.90	49,942	4.7	9,410	3.3	40,532	5.2
1,550.00–1,599.90	36,452	3.4	8,740	3.1	27,712	3.6
1,600.00–1,649.90	26,022	2.5	8,559	3.0	17,463	2.3
1,650.00–1,699.90	25,793	2.4	8,368	3.0	17,425	2.3
1,700.00–1,749.90	26,557	2.5	10,806	3.8	15,751	2.0
1,750.00–1,799.90	23,961	2.3	10,156	3.6	13,805	1.8
1,800.00–1,849.90	21,335	2.0	9,655	3.4	11,680	1.5
1,850.00–1,899.90	19,408	1.8	9,504	3.4	9,904	1.3
1,900.00–1,949.90	17,917	1.7	9,307	3.3	8,610	1.1
1,950.00–1,999.90	17,341	1.6	9,547	3.4	7,794	1.0
2,000.00 or more	50,802	4.8	42,118	14.9	8,684	1.1
Average benefit (dollars)	1,235.00		1,391.20		1,177.80	

(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, 2006—Continued**

Sex and monthly benefit (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	942,197	100.0	223,103	100.0	719,094	100.0
Less than 500.00	158,903	16.9	25,372	11.4	133,531	18.6
500.00–549.90	44,948	4.8	6,058	2.7	38,890	5.4
550.00–599.90	49,498	5.3	7,843	3.5	41,655	5.8
600.00–649.90	57,891	6.1	9,676	4.3	48,215	6.7
650.00–699.90	60,947	6.5	10,127	4.5	50,820	7.1
700.00–749.90	61,310	6.5	10,615	4.8	50,695	7.0
750.00–799.90	50,125	5.3	10,182	4.6	39,943	5.6
800.00–849.90	44,372	4.7	10,194	4.6	34,178	4.8
850.00–899.90	42,344	4.5	10,081	4.5	32,263	4.5
900.00–949.90	39,159	4.2	10,110	4.5	29,049	4.0
950.00–999.90	36,338	3.9	9,655	4.3	26,683	3.7
1,000.00–1,049.90	32,917	3.5	9,218	4.1	23,699	3.3
1,050.00–1,099.90	31,254	3.3	8,975	4.0	22,279	3.1
1,100.00–1,149.90	28,366	3.0	8,284	3.7	20,082	2.8
1,150.00–1,199.90	25,502	2.7	7,830	3.5	17,672	2.5
1,200.00–1,249.90	23,149	2.5	7,297	3.3	15,852	2.2
1,250.00–1,299.90	22,719	2.4	6,648	3.0	16,071	2.2
1,300.00–1,349.90	23,402	2.5	6,118	2.7	17,284	2.4
1,350.00–1,399.90	19,641	2.1	5,525	2.5	14,116	2.0
1,400.00–1,449.90	15,757	1.7	5,044	2.3	10,713	1.5
1,450.00–1,499.90	13,302	1.4	4,846	2.2	8,456	1.2
1,500.00–1,549.90	10,083	1.1	4,143	1.9	5,940	0.8
1,550.00–1,599.90	8,196	0.9	3,790	1.7	4,406	0.6
1,600.00–1,649.90	6,921	0.7	3,251	1.5	3,670	0.5
1,650.00–1,699.90	6,460	0.7	2,870	1.3	3,590	0.5
1,700.00–1,749.90	6,758	0.7	3,827	1.7	2,931	0.4
1,750.00–1,799.90	5,502	0.6	3,363	1.5	2,139	0.3
1,800.00–1,849.90	4,349	0.5	2,802	1.3	1,547	0.2
1,850.00–1,899.90	3,528	0.4	2,404	1.1	1,124	0.2
1,900.00–1,949.90	2,608	0.3	1,832	0.8	776	0.1
1,950.00–1,999.90	2,115	0.2	1,632	0.7	483	0.1
2,000.00 or more	3,833	0.4	3,491	1.6	342	a
Average benefit (dollars)	850.20		1,003.60		802.60	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Benefits awarded before the December increase are converted to the December rates before computation of the percentages.

a. Less than 0.05 percent.

CONTACT: Jennie H. Park (410) 965-9358.

## 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, 2006**

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	1,999,019	100.0	506,303	100.0	1,492,716	100.0
Less than 500.00	210,710	10.5	51,201	10.1	159,509	10.7
500.00–549.90	32,694	1.6	9,786	1.9	22,908	1.5
550.00–599.90	35,041	1.8	12,686	2.5	22,355	1.5
600.00–649.90	64,991	3.3	15,752	3.1	49,239	3.3
650.00–699.90	69,697	3.5	16,306	3.2	53,391	3.6
700.00–749.90	68,037	3.4	16,616	3.3	51,421	3.4
750.00–799.90	65,030	3.3	16,426	3.2	48,604	3.3
800.00–849.90	63,240	3.2	16,384	3.2	46,856	3.1
850.00–899.90	61,797	3.1	16,232	3.2	45,565	3.1
900.00–949.90	60,687	3.0	16,114	3.2	44,573	3.0
950.00–999.90	59,129	3.0	15,867	3.1	43,262	2.9
1,000.00–1,049.90	57,822	2.9	15,675	3.1	42,147	2.8
1,050.00–1,099.90	56,769	2.8	15,473	3.1	41,296	2.8
1,100.00–1,149.90	55,794	2.8	14,750	2.9	41,044	2.7
1,150.00–1,199.90	53,818	2.7	14,259	2.8	39,559	2.7
1,200.00–1,249.90	52,699	2.6	13,904	2.7	38,795	2.6
1,250.00–1,299.90	51,381	2.6	13,476	2.7	37,905	2.5
1,300.00–1,349.90	50,549	2.5	13,180	2.6	37,369	2.5
1,350.00–1,399.90	49,013	2.5	12,564	2.5	36,449	2.4
1,400.00–1,449.90	48,412	2.4	12,544	2.5	35,868	2.4
1,450.00–1,499.90	48,598	2.4	13,820	2.7	34,778	2.3
1,500.00–1,549.90	47,382	2.4	13,107	2.6	34,275	2.3
1,550.00–1,599.90	44,826	2.2	11,840	2.3	32,986	2.2
1,600.00–1,649.90	43,868	2.2	11,485	2.3	32,383	2.2
1,650.00–1,699.90	44,744	2.2	11,358	2.2	33,386	2.2
1,700.00–1,749.90	77,554	3.9	14,757	2.9	62,797	4.2
1,750.00–1,799.90	73,354	3.7	13,455	2.7	59,899	4.0
1,800.00–1,849.90	68,026	3.4	12,283	2.4	55,743	3.7
1,850.00–1,899.90	60,979	3.1	11,883	2.3	49,096	3.3
1,900.00–1,949.90	55,913	2.8	11,270	2.2	44,643	3.0
1,950.00–1,999.90	53,459	2.7	11,389	2.2	42,070	2.8
2,000.00 or more	113,006	5.7	40,461	8.0	72,545	4.9
Average primary insurance amount (dollars)	1,201.00		1,191.90		1,204.10	

(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, 2006—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	1,056,822	100.0	283,200	100.0	773,622	100.0
Less than 500.00	73,361	6.9	22,949	8.1	50,412	6.5
500.00–549.90	9,142	0.9	2,917	1.0	6,225	0.8
550.00–599.90	9,395	0.9	3,530	1.2	5,865	0.8
600.00–649.90	16,362	1.5	4,537	1.6	11,825	1.5
650.00–699.90	17,992	1.7	4,744	1.7	13,248	1.7
700.00–749.90	18,026	1.7	4,949	1.7	13,077	1.7
750.00–799.90	17,628	1.7	5,125	1.8	12,503	1.6
800.00–849.90	18,008	1.7	5,249	1.9	12,759	1.6
850.00–899.90	18,664	1.8	5,622	2.0	13,042	1.7
900.00–949.90	19,369	1.8	5,807	2.1	13,562	1.8
950.00–999.90	20,249	1.9	6,135	2.2	14,114	1.8
1,000.00–1,049.90	21,214	2.0	6,593	2.3	14,621	1.9
1,050.00–1,099.90	22,081	2.1	6,852	2.4	15,229	2.0
1,100.00–1,149.90	23,315	2.2	7,008	2.5	16,307	2.1
1,150.00–1,199.90	24,194	2.3	7,233	2.6	16,961	2.2
1,200.00–1,249.90	25,418	2.4	7,356	2.6	18,062	2.3
1,250.00–1,299.90	26,512	2.5	7,613	2.7	18,899	2.4
1,300.00–1,349.90	27,828	2.6	8,016	2.8	19,812	2.6
1,350.00–1,399.90	28,659	2.7	7,983	2.8	20,676	2.7
1,400.00–1,449.90	29,760	2.8	8,294	2.9	21,466	2.8
1,450.00–1,499.90	31,511	3.0	9,809	3.5	21,702	2.8
1,500.00–1,549.90	31,909	3.0	9,532	3.4	22,377	2.9
1,550.00–1,599.90	31,177	3.0	8,695	3.1	22,482	2.9
1,600.00–1,649.90	31,480	3.0	8,670	3.1	22,810	2.9
1,650.00–1,699.90	33,037	3.1	8,718	3.1	24,319	3.1
1,700.00–1,749.90	58,809	5.6	11,164	3.9	47,645	6.2
1,750.00–1,799.90	58,255	5.5	10,367	3.7	47,888	6.2
1,800.00–1,849.90	56,186	5.3	9,775	3.5	46,411	6.0
1,850.00–1,899.90	51,983	4.9	9,844	3.5	42,139	5.4
1,900.00–1,949.90	49,347	4.7	9,713	3.4	39,634	5.1
1,950.00–1,999.90	48,478	4.6	10,073	3.6	38,405	5.0
2,000.00 or more	107,473	10.2	38,328	13.5	69,145	8.9
Average primary insurance amount (dollars)	1,421.50		1,378.90		1,437.10	

(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, 2006—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	942,197	100.0	223,103	100.0	719,094	100.0
Less than 500.00	137,349	14.6	28,252	12.7	109,097	15.2
500.00–549.90	23,552	2.5	6,869	3.1	16,683	2.3
550.00–599.90	25,646	2.7	9,156	4.1	16,490	2.3
600.00–649.90	48,629	5.2	11,215	5.0	37,414	5.2
650.00–699.90	51,705	5.5	11,562	5.2	40,143	5.6
700.00–749.90	50,011	5.3	11,667	5.2	38,344	5.3
750.00–799.90	47,402	5.0	11,301	5.1	36,101	5.0
800.00–849.90	45,232	4.8	11,135	5.0	34,097	4.7
850.00–899.90	43,133	4.6	10,610	4.8	32,523	4.5
900.00–949.90	41,318	4.4	10,307	4.6	31,011	4.3
950.00–999.90	38,880	4.1	9,732	4.4	29,148	4.1
1,000.00–1,049.90	36,608	3.9	9,082	4.1	27,526	3.8
1,050.00–1,099.90	34,688	3.7	8,621	3.9	26,067	3.6
1,100.00–1,149.90	32,479	3.4	7,742	3.5	24,737	3.4
1,150.00–1,199.90	29,624	3.1	7,026	3.1	22,598	3.1
1,200.00–1,249.90	27,281	2.9	6,548	2.9	20,733	2.9
1,250.00–1,299.90	24,869	2.6	5,863	2.6	19,006	2.6
1,300.00–1,349.90	22,721	2.4	5,164	2.3	17,557	2.4
1,350.00–1,399.90	20,354	2.2	4,581	2.1	15,773	2.2
1,400.00–1,449.90	18,652	2.0	4,250	1.9	14,402	2.0
1,450.00–1,499.90	17,087	1.8	4,011	1.8	13,076	1.8
1,500.00–1,549.90	15,473	1.6	3,575	1.6	11,898	1.7
1,550.00–1,599.90	13,649	1.4	3,145	1.4	10,504	1.5
1,600.00–1,649.90	12,388	1.3	2,815	1.3	9,573	1.3
1,650.00–1,699.90	11,707	1.2	2,640	1.2	9,067	1.3
1,700.00–1,749.90	18,745	2.0	3,593	1.6	15,152	2.1
1,750.00–1,799.90	15,099	1.6	3,088	1.4	12,011	1.7
1,800.00–1,849.90	11,840	1.3	2,508	1.1	9,332	1.3
1,850.00–1,899.90	8,996	1.0	2,039	0.9	6,957	1.0
1,900.00–1,949.90	6,566	0.7	1,557	0.7	5,009	0.7
1,950.00–1,999.90	4,981	0.5	1,316	0.6	3,665	0.5
2,000.00 or more	5,533	0.6	2,133	1.0	3,400	0.5
Average primary insurance amount (dollars)	953.60		954.50		953.40	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: Primary insurance amounts awarded before the December increase are converted to the December rates before computation of the percentages.

CONTACT: Jennie H. Park (410) 965-9358.

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B5—Number, average age, and percentage distribution, by sex and age, selected years 1940–2006

Year	Number (thousands)	Average age	Percentage distribution by age <sup>a</sup>									
			Total, all ages	62	63	64	65			66–69	70–74	75 or older
							Total	Newly entitled	Disability conversions			
<i>Men</i>												
1940	117	68.1	100.0	...	...	...	17.1	17.1	...	58.8	16.5	7.6
1945	166	69.6	100.0	...	...	...	15.9	15.9	...	43.3	28.1	12.7
1950	444	68.7	100.0	...	...	...	21.9	21.9	...	47.3	21.0	9.8
1955	629	68.4	100.0	...	...	...	29.4	29.4	...	38.0	24.7	7.8
1960	630	66.8	100.0	...	...	...	48.1	42.3	5.8	36.6	13.2	2.1
1965	743	65.7	100.0	15.6	10.0	6.0	31.6	25.8	5.8	25.9	7.7	3.2
1970	814	64.4	100.0	19.0	12.8	8.5	48.7	39.6	9.1	9.3	1.3	0.4
1975	902	64.0	100.0	25.8	14.1	9.0	43.6	32.0	11.6	6.5	0.7	0.2
1980	942	63.9	100.0	30.1	13.1	8.5	42.4	31.8	10.6	5.2	0.6	0.1
1985	986	63.7	100.0	45.5	8.2	11.6	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	29.2	17.2	12.0	3.1	0.6	0.1
1987	970	63.6	100.0	47.6	8.1	11.4	28.8	16.8	12.0	3.4	0.6	0.1
1988	944	63.7	100.0	48.2	8.1	9.9	28.6	16.6	12.0	4.1	0.9	0.2
1989	983	63.7	100.0	48.0	7.1	9.3	30.1	17.5	12.6	4.6	0.7	0.2
1990	964	63.7	100.0	47.2	7.6	11.3	27.6	16.4	11.1	5.1	1.0	0.2
1991	996	63.7	100.0	46.8	8.1	10.9	27.9	17.2	10.7	5.1	0.9	0.2
1992	989	63.7	100.0	48.2	7.3	11.4	27.2	16.6	10.6	5.0	0.8	0.1
1993	980	63.7	100.0	48.7	8.0	11.0	26.7	16.1	10.5	4.5	0.9	0.2
1994	923	63.6	100.0	49.0	7.4	11.4	27.1	15.7	11.5	4.0	1.0	0.1
1995	916	63.7	100.0	49.3	7.3	10.5	27.5	15.8	11.8	4.0	1.1	0.3
1996	895	63.6	100.0	49.9	7.1	9.7	27.6	14.9	12.6	4.5	1.1	0.1
1997 <sup>b</sup>	904	63.7	100.0	50.5	6.6	9.7	26.9	14.9	12.0	4.7	1.3	0.2
1998 <sup>b</sup>	909	63.8	100.0	49.6	7.1	9.9	27.3	14.7	12.6	4.6	1.3	0.2
1999 <sup>b</sup>	940	63.7	100.0	49.3	7.3	9.8	27.4	14.8	12.6	4.7	1.3	0.2
2000 <sup>b</sup>	1,115	64.1	100.0	41.6	6.1	9.4	31.7	20.3	11.4	9.9	1.1	0.2
2001 <sup>b</sup>	992	63.7	100.0	46.8	6.7	12.1	30.8	18.1	12.7	2.8	0.7	0.2
2002 <sup>b</sup>	1,001	63.7	100.0	46.4	7.1	13.8	29.7	17.1	12.6	2.1	0.7	0.2
2003 <sup>b</sup>	969	63.6	100.0	48.3	7.2	11.9	29.6	<sup>c</sup> 17.9	<sup>c</sup> 11.7	2.1	0.7	0.2
2004 <sup>b</sup>	1,010	63.7	100.0	49.0	7.4	10.2	30.0	<sup>c</sup> 18.7	<sup>c</sup> 11.3	2.4	0.7	0.3
2005 <sup>b</sup>	1,061	63.8	100.0	48.6	7.6	9.1	30.8	19.9	10.9	2.7	0.8	0.5
2006 <sup>b</sup>	1,057	63.5	100.0	45.6	7.7	9.2	34.5	22.4	12.1	2.2	0.7	0.3

(Continued)

## 6.B OASDI Benefits Awarded: Retired Workers

**Table 6.B5—Number, average age, and percentage distribution, by sex and age, selected years 1940–2006—Continued**

Year	Number (thousands)	Average age	Percentage distribution by age <sup>a</sup>									
			Total, all ages	62	63	64	65			66–69	70–74	75 or older
							Total	Newly entitled	Disability conversions			
<b>Women</b>												
1940	15	67.4	100.0	...	...	...	20.8	20.8	...	62.3	12.5	4.3
1945	20	68.5	100.0	...	...	...	24.0	24.0	...	45.0	23.6	7.3
1950	123	68.0	100.0	...	...	...	22.3	22.3	...	53.6	19.6	4.4
1955	281	67.8	100.0	...	...	...	36.6	36.6	...	38.7	18.1	6.6
1960	351	65.2	100.0	27.1	13.3	8.1	18.4	17.4	1.0	22.2	8.2	2.7
1965	440	65.3	100.0	32.6	12.1	6.0	19.9	16.9	3.0	17.4	6.7	5.4
1970	524	63.9	100.0	35.8	14.3	7.2	31.3	25.7	5.5	9.2	1.7	0.6
1975	603	63.7	100.0	41.6	13.7	7.0	29.3	22.0	7.3	6.8	1.2	0.4
1980	671	63.5	100.0	45.9	11.5	6.5	29.9	22.1	7.7	5.0	0.9	0.2
1985	697	63.4	100.0	57.9	7.4	9.8	21.3	12.2	9.1	2.6	0.8	0.2
1986	713	63.4	100.0	57.5	7.0	10.4	21.6	12.6	8.9	2.5	0.9	0.2
1987	681	63.3	100.0	58.9	7.2	9.6	20.8	11.8	9.0	2.6	0.7	0.2
1988	667	63.3	100.0	59.4	6.9	7.9	21.8	12.8	9.0	3.1	0.7	0.2
1989	674	63.4	100.0	57.9	6.5	9.4	21.6	12.8	8.8	3.3	1.0	0.3
1990	679	63.5	100.0	55.9	7.2	9.8	21.5	12.7	8.9	4.1	1.0	0.5
1991	685	63.5	100.0	56.1	7.1	9.5	22.3	13.9	8.4	3.8	0.9	0.3
1992	708	63.5	100.0	56.7	6.9	9.8	21.5	12.5	9.0	3.7	1.1	0.3
1993	704	63.5	100.0	56.0	6.8	10.2	22.4	13.6	8.8	3.1	1.1	0.3
1994	690	63.4	100.0	57.6	6.7	10.2	21.0	11.8	9.1	3.3	1.0	0.3
1995	684	63.5	100.0	55.4	6.6	10.1	22.6	12.8	9.7	3.5	1.4	0.4
1996	684	63.4	100.0	57.4	5.9	9.4	22.7	12.5	10.2	3.4	1.0	0.3
1997 <sup>b</sup>	809	65.4	100.0	48.2	5.5	7.5	19.5	10.5	8.9	4.4	6.4	8.5
1998 <sup>b</sup>	733	64.0	100.0	53.1	7.0	8.9	22.0	12.4	9.6	4.1	2.4	2.5
1999 <sup>b</sup>	737	63.6	100.0	55.1	6.8	9.2	22.6	12.5	10.1	3.8	1.8	0.7
2000 <sup>b</sup>	854	63.8	100.0	52.2	5.9	9.3	23.6	13.9	9.7	6.5	2.2	0.4
2001 <sup>b</sup>	795	63.7	100.0	51.3	7.1	11.5	23.7	12.8	10.9	3.1	2.6	0.6
2002 <sup>b</sup>	811	63.6	100.0	52.9	6.6	12.2	23.9	12.7	11.2	2.3	1.8	0.3
2003 <sup>b</sup>	822	63.6	100.0	53.5	6.7	10.6	23.8	<sup>c</sup> 13.5	<sup>c</sup> 10.3	2.7	2.2	0.5
2004 <sup>b</sup>	874	63.6	100.0	54.1	7.0	9.3	24.3	<sup>c</sup> 14.3	<sup>c</sup> 10.0	3.1	1.9	0.4
2005 <sup>b</sup>	939	63.7	100.0	53.3	7.3	8.7	25.0	15.3	9.7	3.3	2.1	0.4
2006 <sup>b</sup>	942	63.4	100.0	50.2	7.5	9.4	27.4	16.9	10.5	3.2	2.0	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.

... = not applicable.

- a. Age in year of award for 1940–1980. Age in month of award for 1985 and later.
- b. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.
- c. Revised data.

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6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C1—Number and percentage distribution, by monthly benefit and sex, 2006

Monthly benefit (dollars)	Total		Men		Women	
	Number	Percent	Number	Percent	Number	Percent
All disabled workers	798,675	100.0	425,285	100.0	373,390	100.0
Less than 100.00	4,336	0.5	2,327	0.5	2,009	0.5
100.00–149.90	2,202	0.3	872	0.2	1,330	0.4
150.00–199.90	5,147	0.6	1,807	0.4	3,340	0.9
200.00–249.90	9,141	1.1	3,302	0.8	5,839	1.6
250.00–299.90	11,599	1.5	4,158	1.0	7,441	2.0
300.00–349.90	12,876	1.6	4,586	1.1	8,290	2.2
350.00–399.90	14,410	1.8	5,159	1.2	9,251	2.5
400.00–449.90	14,705	1.8	5,220	1.2	9,485	2.5
450.00–499.90	15,587	2.0	5,645	1.3	9,942	2.7
500.00–549.90	16,687	2.1	6,063	1.4	10,624	2.8
550.00–599.90	17,807	2.2	6,579	1.5	11,228	3.0
600.00–649.90	37,778	4.7	13,440	3.2	24,338	6.5
650.00–699.90	40,678	5.1	15,072	3.5	25,606	6.9
700.00–749.90	41,096	5.1	15,854	3.7	25,242	6.8
750.00–799.90	39,543	5.0	16,217	3.8	23,326	6.2
800.00–849.90	37,580	4.7	16,086	3.8	21,494	5.8
850.00–899.90	36,507	4.6	16,409	3.9	20,098	5.4
900.00–949.90	33,969	4.3	16,103	3.8	17,866	4.8
950.00–999.90	32,846	4.1	16,252	3.8	16,594	4.4
1,000.00–1,049.90	30,441	3.8	15,750	3.7	14,691	3.9
1,050.00–1,099.90	28,779	3.6	15,693	3.7	13,086	3.5
1,100.00–1,149.90	27,451	3.4	15,446	3.6	12,005	3.2
1,150.00–1,199.90	25,157	3.1	14,829	3.5	10,328	2.8
1,200.00–1,249.90	23,751	3.0	14,636	3.4	9,115	2.4
1,250.00–1,299.90	21,917	2.7	14,182	3.3	7,735	2.1
1,300.00–1,349.90	19,751	2.5	13,007	3.1	6,744	1.8
1,350.00–1,399.90	18,392	2.3	12,451	2.9	5,941	1.6
1,400.00–1,449.90	16,843	2.1	11,561	2.7	5,282	1.4
1,450.00–1,499.90	15,648	2.0	11,017	2.6	4,631	1.2
1,500.00–1,549.90	14,195	1.8	10,320	2.4	3,875	1.0
1,550.00–1,599.90	13,282	1.7	9,661	2.3	3,621	1.0
1,600.00–1,649.90	12,500	1.6	9,336	2.2	3,164	0.8
1,650.00–1,699.90	12,908	1.6	9,828	2.3	3,080	0.8
1,700.00–1,749.90	19,326	2.4	14,962	3.5	4,364	1.2
1,750.00–1,799.90	16,205	2.0	12,708	3.0	3,497	0.9
1,800.00–1,849.90	13,453	1.7	10,904	2.6	2,549	0.7
1,850.00–1,899.90	11,346	1.4	9,365	2.2	1,981	0.5
1,900.00–1,949.90	9,303	1.2	7,928	1.9	1,375	0.4
1,950.00–1,999.90	7,746	1.0	6,640	1.6	1,106	0.3
2,000.00 or more	15,787	2.0	13,910	3.3	1,877	0.5
Average benefit (dollars)	1,030.90		1,164.50		878.60	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTES: Benefits awarded before the December increase are converted to the December rates before computation of the percentages.

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.

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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 1957–2006

Year	Number	Average age	Percentage distribution, by age <sup>a</sup>									
			Total, all ages	Under 30	30–39	40–44	45–49	50–54	55–59	60–61	62–64	65 <sup>b</sup>
<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

(Continued)

6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C2—Number, average age, and percentage distribution, by sex and age, selected years 1957–2006—Continued

Year	Number	Average age	Percentage distribution, by age <sup>a</sup>									
			Total, all ages	Under 30	30–39	40–44	45–49	50–54	55–59	60–61	62–64	65 <sup>b</sup>
<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

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.

... = not applicable.

a. Age in year of award for 1957–1984. Age in month of award for 1985 and later.

b. Includes awards processed after attainment of age 65.

CONTACT: Jennie H. Park (410) 965-9358.

## 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, selected years, 1960–2006**

Year	Number (thousands)		Awards as a percentage of applications	Awards per 1,000 insured workers
	Applications	Awards		
1960	418.6	207.8	49.6	4.5
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	5.6
1972	947.5	455.4	48.1	6.0
1973	1,067.5	491.6	46.1	6.3
1974	1,330.2	536.0	40.3	6.7
1975	1,285.3	592.0	46.1	7.1
1976	1,232.2	551.5	44.8	6.5
1977	1,235.2	568.9	46.1	6.5
1978	1,184.7	464.4	39.2	5.2
1979	1,187.8	416.7	35.1	4.4
1980	1,262.3	396.6	31.4	4.0
1981	1,161.2	351.8	30.3	3.4
1982	1,019.8	297.1	29.1	2.9
1983	1,019.3	311.5	30.6	3.0
1984	1,036.7	362.0	34.9	3.4
1985	1,066.2	377.4	35.4	3.5
1986	1,118.4	416.9	37.3	3.8
1987	1,108.9	415.8	37.5	3.7
1988	1,017.9	409.5	40.2	3.6
1989	984.9	425.6	43.2	3.7
1990	1,067.7	468.0	43.8	4.0
1991	1,208.7	536.4	44.4	4.5
1992	1,335.1	636.6	47.7	5.2
1993	1,425.8	635.2	44.6	5.2
1994	1,443.8	631.9	43.8	5.1
1995	1,338.1	645.6	48.3	5.1
1996	1,279.2	624.3	48.8	4.9
1997	1,180.2	587.7	49.8	4.5
1998	1,169.3	608.4	52.0	4.6
1999	1,200.1	620.6	51.7	4.6
2000	1,330.6	621.3	46.7	4.5
2001	1,498.6	690.5	46.1	5.0
2002	1,682.5	750.0	44.6	5.3
2003	1,895.5	777.5	41.0	5.5
2004	2,137.5	795.8	37.2	5.5
2005	2,122.1	829.7	39.1	5.7
2006	2,134.1	803.8	37.7	5.6

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

CONTACT: Jeff Kunkel (410) 965-3013.



6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D1—Number of wives and husbands, by type of benefit, selected years 1950–2006

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

(Continued)

## 6.D OASDI Benefits Awarded: Dependents and Survivors

**Table 6.D1—Number of wives and husbands, by type of benefit, selected years 1950–2006—Continued**

Year	Total	Wives with entitlement based on—		Husbands
		Care of children	Age	
<i>Wives and husbands of disabled workers</i>				
1958 <sup>a</sup>	12,920	7,869	5,035	16
1959 <sup>b</sup>	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

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.

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 in month of award, and sex, 2006

Basis of entitlement and age	Wives						Husbands	
	Total		Of retired workers		Of disabled workers		Number	Average monthly benefit <sup>a</sup> (dollars)
	Number	Average monthly benefit <sup>a</sup> (dollars)	Number	Average monthly benefit <sup>a</sup> (dollars)	Number	Average monthly benefit <sup>a</sup> (dollars)		
All wives and husbands	359,881	375.30	312,774	390.70	47,107	273.50	18,070	268.00
<b>By age</b>								
Entitlement based on care of children	27,997	294.20	11,160	438.70	16,837	198.50	979	162.90
Under 35	6,150	169.50	829	347.20	5,321	141.80	197	122.80
35–39	4,358	224.60	926	382.70	3,432	181.90	187	139.90
40–44	4,917	274.00	1,490	410.20	3,427	214.80	196	162.20
45–49	4,612	328.60	2,067	431.60	2,545	245.00	177	171.00
50–54	3,500	386.20	2,144	457.70	1,356	273.10	103	169.50
55–59	2,578	446.90	2,026	483.60	552	312.20	79	227.00
60–61	1,005	498.10	900	519.10	105	317.90	24	376.00
62–64	877	398.60	778	413.10	99	284.20	16	167.00
Entitlement based on age	331,884	382.20	301,614	388.90	30,270	315.10	17,091	274.00
62–64	250,535	371.10	223,268	378.70	27,267	308.90	5,873	247.20
62	164,964	360.30	142,095	369.80	22,869	301.40	2,495	211.50
63	38,255	354.30	35,877	356.70	2,378	318.30	1,140	229.50
64	47,316	422.50	45,296	424.30	2,020	382.90	2,238	296.10
65–69	68,794	427.10	66,195	429.10	2,599	374.70	7,256	299.70
65	45,734	444.80	44,148	447.70	1,586	365.60	3,119	329.90
66	9,428	415.10	9,050	416.20	378	388.60	1,211	288.20
67	6,003	382.80	5,719	382.50	284	389.10	1,156	264.80
68	4,194	369.00	3,979	368.10	215	386.20	950	291.10
69	3,435	371.80	3,299	370.90	136	395.00	820	261.20
70–74	8,629	351.80	8,300	352.00	329	345.80	2,540	272.20
75 or older	3,926	365.10	3,851	364.60	75	387.60	1,422	256.60
<b>By sex</b>								
Wives								
Not divorced	319,202	379.20	275,725	396.00	43,477	272.30	...	...
Divorced	40,679	344.90	37,049	350.50	3,630	287.80	...	...
Husbands of—								
Retired workers	...	...	...	...	...	...	15,656	278.80
Disabled workers	...	...	...	...	...	...	2,414	197.90

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. Benefits awarded before the December increase are converted to the December rates before computation of the averages.

CONTACT: Jennie H. Park (410) 965-9358.

## 6.D OASDI Benefits Awarded: Dependents and Survivors

**Table 6.D4—Number of children, by type of benefit, selected years 1940–2006**

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

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2006—*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

(Continued)

## 6.D OASDI Benefits Awarded: Dependents and Survivors

**Table 6.D4—Number of children, by type of benefit, selected years 1940–2006—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

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2006—*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

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.

CONTACT: Jennie H. Park (410) 965-9358.

## 6.D OASDI Benefits Awarded: Dependents and Survivors

**Table 6.D5—Number and average monthly benefit for children, by type of benefit and age in month of award, 2006**

Age	Total children		Children of—						
			Retired workers		Deceased workers		Disabled workers		
	Total number	Average monthly benefit <sup>a</sup> (dollars)	Number	Average monthly benefit <sup>a</sup> (dollars)	Number	Average monthly benefit <sup>a</sup> (dollars)	Number	Average monthly benefit <sup>a</sup> (dollars)	
<b>All children</b>									
Total	897,035	450.00	126,860	481.30	321,155	682.90	449,020	274.50	
<b>Children under age 18</b>									
Subtotal	585,334	399.60	69,819	461.50	189,654	651.30	325,861	239.80	
Under 1	43,183	283.20	2,591	420.30	9,627	567.20	30,965	183.50	
1	18,477	340.60	1,130	418.60	6,536	583.00	10,811	185.90	
2	19,389	346.70	1,364	423.70	6,850	592.90	11,175	186.30	
3	21,034	354.90	1,550	402.30	7,532	600.90	11,952	193.80	
4	22,633	358.80	1,812	400.50	8,019	610.20	12,802	195.50	
5	24,488	365.20	2,065	394.30	8,635	616.80	13,788	203.30	
6	26,194	364.90	2,346	397.70	8,953	623.70	14,895	204.20	
7	27,918	373.00	2,573	403.80	9,655	624.20	15,690	213.50	
8	29,825	379.00	2,978	410.00	10,131	633.80	16,716	219.10	
9	31,501	385.90	3,282	415.80	10,447	642.90	17,772	229.30	
10	33,798	388.40	3,732	423.60	10,916	649.30	19,150	232.70	
11	37,041	394.90	4,293	427.40	11,835	656.70	20,913	240.00	
12	40,230	407.80	4,897	441.80	12,895	665.70	22,438	252.10	
13	43,120	416.20	5,708	451.60	13,329	673.60	24,083	265.40	
14	45,208	434.50	6,383	473.10	14,236	679.00	24,589	282.90	
15	45,893	459.00	7,267	489.20	14,713	704.50	23,913	298.80	
16	43,414	490.80	8,217	533.80	14,538	711.80	20,659	318.20	
17	31,988	517.70	7,631	555.80	10,807	730.20	13,550	326.60	
<b>Disabled adult children</b>									
Subtotal	58,519	455.60	25,679	435.50	17,467	614.60	15,373	308.40	
Under 20	19,651	449.70	3,633	430.00	8,240	621.60	7,778	276.70	
20–24	10,154	460.80	3,313	444.30	3,403	624.60	3,438	314.70	
25–29	7,678	462.20	3,995	445.10	1,836	611.80	1,847	350.80	
30–34	7,903	463.20	5,067	444.30	1,521	605.00	1,315	371.80	
35–39	7,408	461.90	5,558	442.70	1,078	620.90	772	378.10	
40 or older	5,725	438.60	4,113	403.00	1,389	557.80	223	351.80	
<b>Students aged 18–19</b>									
Subtotal	253,182	565.10	31,362	562.80	114,034	746.00	107,786	374.40	
18	252,824	565.20	31,270	563.00	113,913	746.20	107,641	374.40	
19	358	469.00	92	490.20	121	599.00	145	347.00	

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: 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. Benefits awarded before the December increase are converted to the December rates before computation of the averages.

CONTACT: Jennie H. Park (410) 965-9358.



6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D6—Number of mothers and fathers, by type of benefit, 1950–2006

Year	Total	Mothers	Fathers	Widowed			Surviving divorced mothers and fathers
				Subtotal	With at least 1 child under age 16 <sup>a</sup>	Entitled solely because of at least 1 disabled child <sup>b</sup>	
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 <sup>c</sup>	81,467	81,467	...	81,392	80,130	1,262	75
1959 <sup>d</sup>	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, 1950–2006—Continued**

Year	Total	Mothers	Fathers	Widowed			Surviving divorced mothers and fathers
				Subtotal	With at least 1 child under age 16 <sup>a</sup>	Entitled solely because of at least 1 disabled child <sup>b</sup>	
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

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.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D7—Number and average monthly benefit for widow(er)s, by age in month of award and sex, 2006

Age, sex, and type of benefit	Nondisabled				Disabled widow(er)s		Widowed mothers and fathers	
	Widows		Widowers					
	Number	Average monthly benefit <sup>a</sup> (dollars)	Number	Average monthly benefit <sup>a</sup> (dollars)	Number	Average monthly benefit <sup>a</sup> (dollars)	Number	Average monthly benefit <sup>a</sup> (dollars)
All widow(er)s	453,754	846.30	29,884	561.00	28,682	622.10	35,981	739.90
<b>By age</b>								
Under 25	...	...	...	...	...	...	1,327	580.20
25–29	...	...	...	...	...	...	3,017	615.40
30–34	...	...	...	...	...	...	4,675	653.40
35–39	...	...	...	...	...	...	6,580	689.50
40–44	...	...	...	...	...	...	7,850	768.90
45–49	...	...	...	...	...	...	6,688	822.30
50–54	...	...	...	...	13,360	617.50	3,598	841.30
55–59	...	...	...	...	15,050	625.60	1,626	837.70
60–64	149,287	983.50	13,216	770.40	268	653.50	570	782.40
60	67,150	988.20	5,320	752.60	101	628.90	155	778.10
61	22,417	1,011.20	3,830	763.40	70	653.80	140	826.10
62	20,978	968.40	1,707	825.80	48	693.60	113	789.00
63	17,060	944.00	1,007	772.60	35	652.00	97	738.10
64	21,661	986.40	1,349	788.60	14	695.10	65	752.80
65–69	91,039	777.00	4,719	552.20	4	848.10	50	630.50
65	45,248	858.30	2,304	720.00	...	...	...	...
66	11,150	708.90	631	423.30	...	...	...	...
67	11,383	697.60	592	394.90	...	...	...	...
68	11,639	693.60	584	384.10	...	...	...	...
69	11,619	687.20	608	364.70	...	...	...	...
70–74	60,903	711.80	3,135	349.00	...	...	...	...
70	11,839	698.80	617	354.70	...	...	...	...
71	12,191	705.50	666	363.30	...	...	...	...
72	12,058	711.10	657	340.10	...	...	...	...
73	12,348	714.40	607	347.40	...	...	...	...
74	12,467	728.60	588	338.40	...	...	...	...
75–79	64,186	765.20	3,090	323.20	...	...	...	...
75	12,937	748.00	667	341.20	...	...	...	...
76	13,060	767.50	621	331.80	...	...	...	...
77	12,878	768.60	600	309.60	...	...	...	...
78	12,907	769.30	617	320.70	...	...	...	...
79	12,404	773.00	585	310.40	...	...	...	...
80 or older	88,339	837.40	5,724	329.30	...	...	...	...
<b>By sex</b>								
Men	...	...	...	...	1,615	440.50	3,986	617.90
Women	...	...	...	...	27,067	632.90	31,995	755.10
Widow or mother	395,874	843.90	...	...	23,160	630.30	28,496	756.50
Surviving divorced wife or mother	57,880	862.60	...	...	3,907	648.80	3,499	743.80

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: ... = not applicable.

a. Benefits awarded before the December increase are converted to the December rates before computation of the averages.

CONTACT: Jennie H. Park (410) 965-9358.

## 6.D OASDI Benefits Awarded: Dependents and Survivors

**Table 6.D8—Number of widow(er)s, by type of benefit, 1950–2006**

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 <sup>a</sup>	199,320	198,948	372	...	...
1959 <sup>b</sup>	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
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

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.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D9—Number and average amount of lump-sum death payment awards, 1940–2006

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 <sup>a</sup>	656,825	683,964	202.52
1959 <sup>b</sup>	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, 1940–2006—*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	<sup>c</sup> 835,360	<sup>c</sup> 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	<sup>c</sup> 845,135	<sup>c</sup> 850,411	255.00
2001	<sup>c</sup> 843,983	<sup>c</sup> 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

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

- a. January–November.
- b. Includes December 1958.
- c. Revised data.

CONTACT: Jennie H. Park (410) 965-9358.

**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 2006**

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	153,196	100.0	38,471	100.0	114,725	100.0
Less than 350.00	28,861	18.8	8,718	22.7	20,143	17.6
350.00–399.90	6,043	3.9	3,376	8.8	2,667	2.3
400.00–449.90	4,019	2.6	1,478	3.8	2,541	2.2
450.00–499.90	4,786	3.1	1,246	3.2	3,540	3.1
500.00–549.90	6,042	3.9	1,686	4.4	4,356	3.8
550.00–599.90	6,530	4.3	1,919	5.0	4,611	4.0
600.00–649.90	6,729	4.4	1,936	5.0	4,793	4.2
650.00–699.90	6,582	4.3	1,760	4.6	4,822	4.2
700.00–749.90	6,174	4.0	1,556	4.0	4,618	4.0
750.00–799.90	5,679	3.7	1,300	3.4	4,379	3.8
800.00–849.90	5,165	3.4	1,241	3.2	3,924	3.4
850.00–899.90	5,163	3.4	1,233	3.2	3,930	3.4
900.00–949.90	5,036	3.3	1,320	3.4	3,716	3.2
950.00–999.90	4,603	3.0	1,026	2.7	3,577	3.1
1,000.00–1,049.90	4,427	2.9	999	2.6	3,428	3.0
1,050.00–1,099.90	4,215	2.8	839	2.2	3,376	2.9
1,100.00–1,149.90	3,809	2.5	685	1.8	3,124	2.7
1,150.00–1,199.90	3,780	2.5	700	1.8	3,080	2.7
1,200.00–1,249.90	3,379	2.2	602	1.6	2,777	2.4
1,250.00–1,299.90	3,297	2.2	526	1.4	2,771	2.4
1,300.00–1,349.90	3,903	2.5	501	1.3	3,402	3.0
1,350.00–1,399.90	3,802	2.5	417	1.1	3,385	3.0
1,400.00–1,449.90	3,640	2.4	415	1.1	3,225	2.8
1,450.00–1,499.90	3,530	2.3	401	1.0	3,129	2.7
1,500.00 or more	14,002	9.1	2,591	6.7	11,411	9.9
Men	91,858	100.0	25,009	100.0	66,849	100.0
Less than 350.00	12,971	14.1	3,880	15.5	9,091	13.6
350.00–399.90	4,037	4.4	2,480	9.9	1,557	2.3
400.00–449.90	2,629	2.9	1,116	4.5	1,513	2.3
450.00–499.90	2,964	3.2	959	3.8	2,005	3.0
500.00–549.90	3,523	3.8	1,232	4.9	2,291	3.4
550.00–599.90	3,479	3.8	1,349	5.4	2,130	3.2
600.00–649.90	3,446	3.8	1,413	5.6	2,033	3.0
650.00–699.90	3,257	3.5	1,251	5.0	2,006	3.0
700.00–749.90	2,862	3.1	1,013	4.1	1,849	2.8
750.00–799.90	2,780	3.0	901	3.6	1,879	2.8
800.00–849.90	2,663	2.9	830	3.3	1,833	2.7
850.00–899.90	2,893	3.1	869	3.5	2,024	3.0
900.00–949.90	2,919	3.2	917	3.7	2,002	3.0
950.00–999.90	2,709	2.9	694	2.8	2,015	3.0
1,000.00–1,049.90	2,697	2.9	676	2.7	2,021	3.0
1,050.00–1,099.90	2,679	2.9	562	2.2	2,117	3.2
1,100.00–1,149.90	2,464	2.7	466	1.9	1,998	3.0
1,150.00–1,199.90	2,511	2.7	474	1.9	2,037	3.0
1,200.00–1,249.90	2,294	2.5	388	1.6	1,906	2.9
1,250.00–1,299.90	2,366	2.6	368	1.5	1,998	3.0
1,300.00–1,349.90	2,971	3.2	348	1.4	2,623	3.9
1,350.00–1,399.90	2,996	3.3	310	1.2	2,686	4.0
1,400.00–1,449.90	2,966	3.2	304	1.2	2,662	4.0
1,450.00–1,499.90	2,902	3.2	285	1.1	2,617	3.9
1,500.00 or more	11,880	12.9	1,924	7.7	9,956	14.9

(Continued)

## 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 2006—*Continued***

Sex and monthly benefit (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	61,338	100.0	13,462	100.0	47,876	100.0
Less than 350.00	15,890	25.9	4,838	35.9	11,052	23.1
350.00–399.90	2,006	3.3	896	6.7	1,110	2.3
400.00–449.90	1,390	2.3	362	2.7	1,028	2.1
450.00–499.90	1,822	3.0	287	2.1	1,535	3.2
500.00–549.90	2,519	4.1	454	3.4	2,065	4.3
550.00–599.90	3,051	5.0	570	4.2	2,481	5.2
600.00–649.90	3,283	5.4	523	3.9	2,760	5.8
650.00–699.90	3,325	5.4	509	3.8	2,816	5.9
700.00–749.90	3,312	5.4	543	4.0	2,769	5.8
750.00–799.90	2,899	4.7	399	3.0	2,500	5.2
800.00–849.90	2,502	4.1	411	3.1	2,091	4.4
850.00–899.90	2,270	3.7	364	2.7	1,906	4.0
900.00–949.90	2,117	3.5	403	3.0	1,714	3.6
950.00–999.90	1,894	3.1	332	2.5	1,562	3.3
1,000.00–1,049.90	1,730	2.8	323	2.4	1,407	2.9
1,050.00–1,099.90	1,536	2.5	277	2.1	1,259	2.6
1,100.00–1,149.90	1,345	2.2	219	1.6	1,126	2.4
1,150.00–1,199.90	1,269	2.1	226	1.7	1,043	2.2
1,200.00–1,249.90	1,085	1.8	214	1.6	871	1.8
1,250.00–1,299.90	931	1.5	158	1.2	773	1.6
1,300.00–1,349.90	932	1.5	153	1.1	779	1.6
1,350.00–1,399.90	806	1.3	107	0.8	699	1.5
1,400.00–1,449.90	674	1.1	111	0.8	563	1.2
1,450.00–1,499.90	628	1.0	116	0.9	512	1.1
1,500.00 or more	2,122	3.5	667	5.0	1,455	3.0

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

CONTACT: Hazel P. Jenkins (410) 965-0164.



**Table 6.E4—Number of beneficiaries with benefits withheld, by reason for withholding payment and type of benefit, December 2006**

Reason payment withheld	Total, all beneficiaries	Retired workers			Disabled workers	Wives and husbands					Children	Widowed mothers and fathers	Widow-(er)s	Parents	Special age-72 beneficiaries
		Subtotal	Men	Women		Subtotal	Wives		Husbands						
							Without children <sup>a</sup>	With children <sup>b</sup>							
Total	2,003,647	153,196	91,858	61,338	132,317	323,998	204,421	48,353	71,224	539,317	56,959	788,017	621	9,222	
Earnings of—															
Retired workers	57,408	53,909	31,631	22,278	...	2,030	1,727	212	91	1,469	...	...	...	...	
Other beneficiaries	77,335	...	...	...	...	30,747	1,078	27,540	2,129	129	33,871	12,588	...	...	
Entitled child not in care of beneficiary	25,072	...	...	...	...	11,159	21	10,326	812	...	13,913	...	...	...	
Payee not determined	12,583	912	436	476	2,081	44	c	c	c	9,256	8	c	c	c	
Recoupment of overpayment for reasons other than earnings	38,124	11,953	6,141	5,812	8,155	2,171	1,299	788	84	11,659	1,219	2,965	c	c	
Address unknown	68,351	26,082	14,721	11,361	12,276	2,235	1,536	442	257	17,458	347	9,499	53	401	
Determination of continuing disability pending	4,851	...	...	...	3,143	102	c	c	c	1,603	...	c	...	...	
Workers' compensation offset	4,904	...	...	...	1,649	355	106	232	17	2,900	...	...	...	...	
Government pension offset	344,747	...	...	...	...	220,724	157,502	49	63,173	...	97	120,534	...	3,392	
Receipt of public assistance	3,704	...	...	...	...	...	...	...	...	...	...	...	...	3,704	
Technical entitlement	1,087,201	...	...	...	...	28,683	20,893	5,378	2,412	436,279	1,784	620,299	112	44	
Other reasons	279,367	60,340	38,929	21,411	105,013	25,748	20,219	3,287	2,242	58,564	5,720	21,848	454	1,680	

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.  
c. Not shown to avoid disclosure of information regarding particular individuals.

CONTACT: Hazel P. Jenkins (410) 965-0164.

## 6.E OASDI: Benefits Withheld

**Table 6.E5—Number of wives, husbands, and children with benefits withheld, by reason for withholding payment and type of benefit, December 2006**

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	274,604	49,394	23,281	46,112	259,173	97,891	79,689	27,403	869	1,660	3,239
Earnings of—											
Retired workers	2,030	...	1,183	...	...	206	...	...	80	...	...
Other beneficiaries	6,397	24,350	22	21	60	<sup>a</sup>	14	...	<sup>a</sup>	<sup>a</sup>	7
Entitled child not in care of beneficiary	1,744	9,415	...	...	...	...	...	...	...	...	...
Payee not determined	39	5	433	3,487	4,182	<sup>a</sup>	835	109	<sup>a</sup>	<sup>a</sup>	17
Recoupment of overpayment for reasons other than earnings	1,334	837	523	2,528	7,749	120	340	129	27	87	156
Address unknown	1,748	487	831	4,088	8,862	487	2,295	470	46	235	144
Determination of continuing disability pending	...	102	...	...	1,304	42	142	103	...	...	12
Workers' compensation offset	...	355	...	...	2,788	...	...	79	...	...	33
Government pension offset	217,952	2,772	...	...	...	...	...	...	...	...	...
Technical entitlement	20,562	8,121	16,934	26,198	206,890	93,935	65,941	22,177	640	1,084	2,480
Other reasons	22,798	2,950	3,355	9,790	27,338	2,935	10,122	4,336	71	227	390

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: ... = not applicable.

a. Not shown to avoid disclosure of information regarding particular individuals.

CONTACT: Hazel P. Jenkins (410) 965-0164.

Table 6.F1—Number of benefits terminated, by type, 1940–2006

Year	Total, all benefits	Retired workers	Disabled workers	Wives and husbands	Children				Widowed mothers and fathers	Widow(er)s	Parents	Special age-72 beneficiaries
					Total	Under age 18	Disabled adult children	Students				
Total	148,129,248	52,821,275	16,208,108	18,194,185	41,169,811	26,042,619	863,933	14,263,259	4,665,826	13,729,186	108,073	1,232,784
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	3,324
1967	2,545,076	748,184	208,899	373,803	820,610	503,110	9,178	308,322	102,004	172,411	3,789	115,376
1968	2,654,191	789,586	222,197	386,245	837,390	514,363	10,620	312,407	100,344	188,844	4,004	125,581
1969	2,860,287	827,151	251,269	399,689	946,481	564,725	11,922	369,834	107,119	205,188	3,525	119,865
1970	2,841,523	817,129	260,444	388,574	956,566	582,918	11,795	361,853	102,578	208,843	3,313	104,076
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	94,030
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	82,702
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	80,053
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	69,086
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	57,778
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	52,629
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	49,712
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	42,013
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	34,330
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	31,547
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	27,030
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	22,479
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	24,961
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	18,055
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	14,968
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	15,079
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	11,667
1988	3,087,126	1,227,357	356,143	354,250	723,385	484,001	19,478	219,906	73,473	341,432	922	10,164
1989	2,977,413	1,202,430	351,402	339,550	678,094	454,048	19,726	204,320	66,527	332,040	856	6,514
1990	2,958,646	1,222,810	348,194	337,006	646,343	415,616	20,014	210,713	64,260	334,293	769	4,971
1991	2,943,272	1,237,517	351,303	332,892	619,977	401,092	17,723	201,162	61,383	335,740	646	3,814
1992	2,969,109	1,252,171	361,796	329,102	616,771	397,723	17,857	201,191	65,852	339,827	617	2,973
1993	3,075,227	1,313,867	372,317	336,335	632,585	408,497	18,842	205,246	62,436	354,833	578	2,276
1994	3,124,009	1,329,241	384,590	331,416	647,848	421,730	20,034	206,084	72,662	356,097	529	1,626
1995	3,161,744	1,334,027	399,475	327,233	678,821	451,375	22,639	204,807	61,813	358,691	493	1,191
1996	3,187,291	1,352,339	396,980	321,703	690,618	459,254	23,776	207,588	61,618	362,751	444	838
1997	3,413,296	1,370,596	464,984	319,172	777,803	537,259	26,210	214,334	60,342	419,105	376	918
1998	3,307,618	1,405,342	409,489	313,423	741,412	495,678	26,755	218,979	54,551	382,619	346	436
1999	3,366,363	1,436,865	433,950	312,867	748,950	490,634	29,444	228,872	51,341	381,791	361	238

(Continued)

## 6.F OASDI: Benefits Terminated

**Table 6.F1—Number of benefits terminated, by type, 1940–2006—Continued**

Year	Total, all benefits	Retired workers	Disabled workers	Wives and husbands	Children				Widowed mothers and fathers	Widow(er)s	Parents	Special age-72 beneficiaries
					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	165
2001	3,440,679	1,460,763	459,073	304,413	775,873	515,300	32,988	227,585	49,838	390,315	289	115
2002	3,494,924	1,465,869	478,098	306,796	807,955	534,181	34,722	239,052	49,919	385,945	265	77
2003	3,411,500	1,447,461	447,485	292,156	796,560	526,475	33,030	237,055	47,418	380,155	226	39
2004	3,480,809	1,453,625	458,359	292,183	849,643	555,137	32,802	261,704	48,610	378,153	208	28
2005	3,522,025	1,479,956	485,715	285,609	845,835	566,052	35,018	244,765	46,275	378,403	209	23
2006	3,607,381	1,473,218	506,663	292,969	912,478	616,362	44,575	251,541	47,326	374,512	178	37

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.

NOTE: . . . = not applicable.

CONTACT: Jennie H. Park (410) 965-9358.

Table 6.F2—Number, by reason for termination and type of benefit, 2006

Reason for termination	All benefits	Retired workers	Disabled workers	Wives and husbands	Children	Widowed mothers and fathers	Widow(er)s and parents	Special age-72 beneficiaries
Total	3,607,381	1,473,218	506,663	292,969	912,478	47,326	374,690	37
Death of beneficiary	2,012,248	1,395,342	205,993	76,575	21,039	929	312,333	37
Death of worker	159,866	...	...	131,186	28,680	...	...	...
Marriage, remarriage, or divorce of beneficiary	21,127	...	...	4,329	6,394	9,034	1,370	...
Attainment of age—								
16 by child	54,122	...	...	22,496	...	31,626	...	...
18 by child	462,488	...	...	...	462,488	...	...	...
19 by student	50,225	...	...	...	50,225	...	...	...
FRA by disabled worker	248,558	...	228,527	10,279	9,752	...	...	...
FRA by disabled widow(er)	14,963	...	...	...	...	...	14,963	...
Entitlement to an equal or larger Social Security benefit	106,436	50,767	3,818	5,806	5,264	2,212	38,569	...
Does not meet medical standards <sup>a</sup>								
Disabled worker or widow(er)	99,955	...	59,187	1,689	38,821	...	258	...
Disabled adult child	3,248	...	...	...	3,248	...	...	...
Student no longer attending school	194,829	...	...	...	194,829	...	...	...
Other	179,316	27,109	9,138	40,609	91,738	3,525	7,197	...

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.

Table 6.F3—Number of wives, husbands, and children, by reason for termination and type of benefit, 2006

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	248,509	44,460	62,617	205,434	348,311	13,304	18,976	12,295	31,803	120,106	99,632
Death of beneficiary	75,003	1,572	146	1,323	822	3,199	14,720	649	20	92	68
Death of worker	124,857	6,329	...	...	25,330	...	...	2,100	...	...	1,250
Marriage, remarriage, or divorce of beneficiary	2,324	2,005	538	700	2,043	461	1,443	800	46	173	190
Attainment of age—											
16 by child	7,809	14,687	...	...	...	...	...	...	...	...	...
18 by child	...	...	54,566	200,536	207,386	...	...	...	...	...	...
19 by student	...	...	...	...	...	...	...	...	5,817	26,359	18,049
FRA by disabled worker	...	10,279	...	...	5,782	...	...	3,650	...	...	320
Entitlement to an equal or larger Social Security benefit	4,549	1,257	3,948	177	390	333	198	145	56	8	9
Does not meet medical standards <sup>a</sup>											
Disabled worker	...	1,689	...	...	36,998	...	...	1,445	...	...	378
Disabled adult child	...	...	...	...	...	651	2,260	337	...	...	...
Student no longer attending school	...	...	...	...	...	...	...	...	25,331	92,456	77,042
Other	33,967	6,642	3,419	2,698	69,560	8,660	355	3,169	533	1,018	2,326

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.



## **Section 7. Supplemental Security Income**

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<b>Summary</b>	<b>7.1</b>
<b>State Data</b>	<b>7.8</b>
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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 2006**

Source of payment	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older <sup>a</sup>
<b>Number of recipients</b>							
Total	7,235,583	1,211,656	73,418	5,950,509	1,078,977	4,152,130	2,004,476
Federal payment only	4,967,004	621,081	42,761	4,303,162	858,917	2,989,045	1,119,042
Federal payment and state supplementation	1,971,686	487,844	25,404	1,458,438	217,437	1,015,345	738,904
State supplementation only	296,893	102,731	5,253	188,909	2,623	147,740	146,530
Total with—							
Federal payment	6,938,690	1,108,925	68,165	5,761,600	1,076,354	4,004,390	1,857,946
State supplementation	2,268,579	590,575	30,657	1,647,347	220,060	1,163,085	885,434
<b>Total payments<sup>b</sup> (thousands of dollars)</b>							
Total	3,499,569	453,529	36,297	3,009,743	610,874	2,134,335	754,360
Federal payments	3,130,803	351,915	29,133	2,749,754	592,877	1,936,436	601,490
State supplementation	368,767	101,614	7,164	259,989	17,997	197,900	152,870
<b>Average monthly payment<sup>c</sup> (dollars)</b>							
Total	454.75	373.05	488.42	471.00	541.85	470.64	375.10
Federal payments	423.05	316.48	423.15	443.61	527.42	441.60	322.87
State supplementation	156.24	170.64	228.97	149.71	77.04	159.79	171.26

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 16,200 blind and 776,600 disabled persons aged 65 or older.  
b. Includes retroactive payments.  
c. Excludes retroactive payments.

CONTACT: Art Kahn (410) 965-0186.

**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 2006**

Source of payment	Aged		Blind		Disabled		Blind and disabled under age 18
	Individual	Couple	Individual	Couple	Individual	Couple	
<b>Number of recipients</b>							
Total	946,381	134,697	62,705	2,694	4,584,858	143,940	1,078,977
Federal payment only	515,988	53,105	36,814	1,130	3,274,454	86,105	858,917
Federal payment and state supplementation	356,978	67,270	21,188	1,290	1,139,892	49,908	217,437
State supplementation only	73,415	14,322	4,703	274	170,512	7,927	2,623
Total with—							
Federal payment	872,966	120,375	58,002	2,420	4,414,346	136,013	1,076,354
State supplementation	430,393	81,592	25,891	1,564	1,310,404	57,835	220,060
<b>Total payments<sup>a</sup> (thousands of dollars)</b>							
Total	348,901	107,633	30,548	2,534	2,289,148	109,931	610,874
Federal payments	280,108	74,212	24,644	1,595	2,070,989	86,379	592,877
State supplementation	68,793	33,421	5,904	940	218,159	23,552	17,997
<b>Average monthly payment<sup>b</sup> (dollars)</b>							
Total	367.59	794.77	480.94	922.94	460.70	736.26	541.85
Federal payments	320.14	613.72	420.37	646.45	431.71	610.58	527.42
State supplementation	158.39	406.86	223.25	594.37	157.52	398.53	77.04

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.

## 7.A SSI: Summary

**Table 7.A3—Number of recipients of federally administered payments, by eligibility category, January 1974 and December 1975–2006, selected years**

Month and year	Total <sup>a</sup>	Federal SSI	Federally administered state supplementation	State supplementation only
<b>All recipients</b>				
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
<b>Aged</b>				
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
<b>Blind</b>				
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

(Continued)

**Table 7.A3—Number of recipients of federally administered payments, by eligibility category, January 1974 and December 1975–2006, selected years—Continued**

Month and year	Total <sup>a</sup>	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

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.

## 7.A SSI: Summary

**Table 7.A4—Total federally administered payments, by eligibility category, selected years 1974–2006  
(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
<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
<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
<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

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.

**Table 7.A5—Average monthly federally administered payment, by eligibility category, December 1975–2006, 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
<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
<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
<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

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: Excludes retroactive payments.

CONTACT: Art Kahn (410) 965-0186.

## 7.A SSI: Summary

**Table 7.A8—Number of federally administered awards, by eligibility category and age, 1974–2006**

Year	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older
All awards	27,226,940	7,585,721	303,062	19,338,157	3,534,700	15,953,361	7,738,879
State conversions <sup>a</sup>	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

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.

**Table 7.A9—Number of recipients of federally administered payments, by eligibility category and age, December 1974–2006**

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

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: Art Kahn (410) 965-0186.

## 7.B SSI: State Data

**Table 7.B1—Number of recipients of federally administered payments, December 2006, and total payments for calendar year 2006, by state or other area and eligibility category**

State or area	Number				Total payments (thousands of dollars)			
	Total	Aged	Blind <sup>a</sup>	Disabled <sup>b</sup>	Total	Aged	Blind	Disabled
All areas <sup>c</sup>	7,235,583	1,211,656	73,418	5,950,509	38,888,961	5,115,911	409,287	33,363,762
Alabama	164,764	16,659	929	147,176	805,370	36,967	4,180	764,223
Alaska	11,340	2,114	102	9,124	56,455	7,059	478	48,917
Arizona	99,196	13,415	877	84,904	506,119	47,375	4,426	454,318
Arkansas	92,960	9,157	775	83,028	433,035	18,095	3,322	411,617
California	1,226,697	360,316	21,273	845,108	8,300,356	2,129,323	153,424	6,017,609
Colorado	56,830	8,648	528	47,654	278,569	31,332	2,589	244,647
Connecticut	53,276	6,700	467	46,109	271,916	26,412	2,299	243,205
Delaware	14,038	1,300	106	12,632	69,448	4,087	498	64,865
District of Columbia	21,713	1,974	151	19,588	119,087	6,425	719	111,943
Florida	427,902	100,597	2,770	324,535	2,128,009	387,095	13,407	1,727,507
Georgia	205,793	26,753	1,974	177,066	985,784	69,957	9,460	906,367
Hawaii	22,924	6,452	198	16,274	125,114	28,499	1,065	95,550
Idaho	23,053	1,825	206	21,022	113,799	4,621	986	108,191
Illinois	261,052	30,448	2,382	228,222	1,394,859	123,866	12,234	1,258,760
Indiana	101,058	5,756	934	94,368	519,364	16,126	4,348	498,889
Iowa	43,896	3,568	769	39,559	203,150	8,856	3,272	191,021
Kansas	39,501	3,225	356	35,920	194,365	9,311	1,706	183,348
Kentucky	181,857	13,374	1,381	167,102	901,618	30,909	6,681	864,029
Louisiana	157,299	16,794	1,608	138,897	760,132	40,010	7,494	712,628
Maine	32,536	2,356	223	29,957	153,051	4,957	1,088	147,006
Maryland	96,248	15,294	647	80,307	505,655	58,860	3,243	443,551
Massachusetts	174,509	44,807	3,729	125,973	952,569	198,940	20,932	732,696
Michigan	225,160	16,680	1,697	206,783	1,206,441	59,171	8,619	1,138,651
Minnesota	75,793	10,266	724	64,803	383,026	39,881	3,545	339,599
Mississippi	123,679	14,157	969	108,553	588,730	30,257	4,192	554,282
Missouri	119,795	9,219	975	109,601	598,130	25,067	4,576	568,487
Montana	15,208	1,087	131	13,990	74,296	2,525	633	71,138
Nebraska	22,621	2,046	244	20,331	108,092	5,393	1,161	101,537
Nevada	34,468	8,823	670	24,975	171,488	32,575	3,809	135,104
New Hampshire	14,470	869	157	13,444	72,064	2,624	694	68,747
New Jersey	154,482	33,722	960	119,800	799,587	141,020	4,714	653,852
New Mexico	55,182	8,457	476	46,249	263,305	24,859	2,342	236,103
New York	641,870	135,790	2,992	503,088	3,713,730	618,788	16,084	3,078,858
North Carolina	202,613	24,302	1,771	176,540	945,195	56,918	8,016	880,261
North Dakota	8,035	954	74	7,007	35,066	2,334	346	32,386
Ohio	254,012	15,242	1,835	236,935	1,346,688	49,798	8,850	1,288,040
Oklahoma	82,386	7,717	780	73,889	405,725	19,628	3,742	382,354
Oregon	62,280	7,949	647	53,684	314,433	27,822	3,258	283,352
Pennsylvania	325,822	28,797	2,144	294,881	1,757,105	99,278	10,642	1,647,186
Rhode Island	30,720	3,923	193	26,604	166,179	14,900	964	150,315
South Carolina	105,411	11,760	1,381	92,270	503,025	27,554	6,190	469,281
South Dakota	12,748	1,630	92	11,026	56,900	3,875	444	52,581
Tennessee	162,574	16,042	1,524	145,008	783,747	36,617	7,354	739,775
Texas	524,458	109,073	6,539	408,846	2,416,535	325,977	31,491	2,059,068
Utah	23,532	2,320	259	20,953	117,489	8,686	1,208	107,595
Vermont	13,457	1,122	89	12,246	66,522	2,626	410	63,486
Virginia	139,313	20,512	1,254	117,547	666,913	68,245	5,910	592,759
Washington	118,946	15,009	921	103,016	656,188	65,872	4,740	585,576
West Virginia	77,987	4,020	576	73,391	396,292	9,085	2,761	384,446
Wisconsin	93,549	8,110	905	84,534	466,399	24,065	4,460	437,874
Wyoming	5,786	406	42	5,338	27,557	896	202	26,458
Outlying area								
Northern Mariana Islands	782	120	12	650	4,291	492	78	3,721

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

- a. Includes approximately 16,200 blind persons aged 65 or older.
- b. Includes approximately 776,600 disabled persons aged 65 or older.
- c. Includes data not distributed by state.

CONTACT: Art Kahn (410) 965-0186 or Stella M. Coleman (410) 965-0157.



**Table 7.B3—Number of recipients of federally administered payments and average monthly payment, by state or other area, December 2006**

State or area	Federal SSI		State supplementation	
	Number	Average monthly payment (dollars)	Number	Average monthly payment (dollars)
All areas <sup>a</sup>	6,938,690	423.05	2,268,579	156.24
Alabama	164,764	403.24	...	...
Alaska	11,340	413.50	...	...
Arizona	99,196	433.79	...	...
Arkansas	92,960	395.90	...	...
California	1,012,388	431.62	1,225,638	224.50
Colorado	56,830	408.14	...	...
Connecticut	53,276	429.95	...	...
Delaware	13,906	421.36	706	126.68
District of Columbia	21,590	450.26	1,512	222.28
Florida	427,900	421.19	...	...
Georgia	205,791	401.76	...	...
Hawaii	21,928	432.54	2,422	436.36
Idaho	23,053	411.79	...	...
Illinois	261,052	454.04	...	...
Indiana	101,058	428.32	...	...
Iowa	43,517	393.04	1,931	187.65
Kansas	39,501	412.33	...	...
Kentucky	181,856	420.44	...	...
Louisiana	157,297	417.32	...	...
Maine	32,536	392.73	...	...
Maryland	96,247	437.09	...	...
Massachusetts	157,889	424.91	174,156	233.00
Michigan	221,884	450.39	16,082	75.47
Minnesota	75,793	430.77	...	...
Mississippi	123,678	398.63	...	...
Missouri	119,795	413.96	...	...
Montana	15,131	402.22	992	52.00
Nebraska	22,621	393.16	...	...
Nevada	33,743	419.22	9,444	234.00
New Hampshire	14,470	406.29	...	...
New Jersey	147,473	414.39	153,833	47.83
New Mexico	55,182	406.05	...	...
New York	596,687	442.16	623,322	233.00
North Carolina	202,613	390.08	...	...
North Dakota	8,035	365.92	...	...
Ohio	254,011	445.84	...	...
Oklahoma	82,386	412.97	...	...
Oregon	62,280	423.91	...	...
Pennsylvania	321,138	447.42	11,991	58.38
Rhode Island	28,401	424.87	30,685	151.88
South Carolina	105,411	397.35	...	...
South Dakota	12,748	382.38	...	...
Tennessee	162,574	404.50	...	...
Texas	524,458	394.65	...	...
Utah	23,526	419.00	2,007	21.00

(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 2006—*Continued***

State or area	Federal SSI		State supplementation	
	Number	Average monthly payment (dollars)	Number	Average monthly payment (dollars)
Vermont	12,412	389.14	13,411	233.00
Virginia	139,313	405.57	...	...
Washington	118,946	449.06	...	...
West Virginia	77,987	428.58	...	...
Wisconsin	93,549	419.83	...	...
Wyoming	5,786	392.96	...	...
Outlying area				
Northern Mariana Islands	782	495.14	...	...

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.

Table 7.B7—Total federally administered payments, by state or other area, 2006 (in thousands of dollars)

State or area	Total	Federal SSI	Federally administered state supplementation
All areas	38,888,961	34,736,088	4,152,873
Alabama	805,370	805,370	...
Alaska	56,455	56,455	...
Arizona	506,119	506,119	...
Arkansas	433,035	433,035	...
California	8,300,356	5,098,651	3,201,705
Colorado	278,569	278,569	...
Connecticut	271,916	271,916	...
Delaware	69,448	68,373	1,075
District of Columbia	119,087	114,981	4,106
Florida	2,128,009	2,128,009	...
Georgia	985,784	985,784	...
Hawaii	125,114	111,099	14,015
Idaho	113,799	113,799	...
Illinois	1,394,859	1,394,859	...
Indiana	519,364	519,364	...
Iowa	203,150	198,873	4,277
Kansas	194,365	194,350	15
Kentucky	901,618	901,618	...
Louisiana	760,132	760,132	...
Maine	153,051	153,051	...
Maryland	505,655	505,637	18
Massachusetts	952,569	785,001	167,568
Michigan	1,206,441	1,183,998	22,443
Minnesota	383,026	383,026	...
Mississippi	588,730	588,730	...
Missouri	598,130	598,130	...
Montana	74,296	73,355	941
Nebraska	108,092	108,092	...
Nevada	171,488	165,919	5,569
New Hampshire	72,064	72,064	...
New Jersey	799,587	715,886	83,701
New Mexico	263,305	263,305	...
New York	3,713,730	3,146,215	567,515
North Carolina	945,195	945,195	...
North Dakota	35,066	35,066	...
Ohio	1,346,688	1,346,688	...
Oklahoma	405,725	405,725	...
Oregon	314,433	314,433	...
Pennsylvania	1,757,105	1,709,630	47,475
Rhode Island	166,179	142,639	23,540
South Carolina	503,025	503,025	...
South Dakota	56,900	56,897	3
Tennessee	783,747	783,747	...
Texas	2,416,535	2,416,535	...
Utah	117,489	117,409	80
Vermont	66,522	57,695	8,827
Virginia	666,913	666,913	...
Washington	656,188	656,188	...
West Virginia	396,292	396,292	...
Wisconsin	466,399	466,399	...
Wyoming	27,557	27,557	...
Outlying area			
Northern Mariana Islands	4,291	4,291	...

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTES: ... = not applicable.

Totals do not necessarily equal the sum of rounded components.

CONTACT: Stella M. Coleman (410) 965-0157.

## 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 2006**

State or area	Total	Blind	Disabled
All areas	1,078,977	6,424	1,072,553
Alabama	28,672	46	28,626
Alaska	1,155	8	1,147
Arizona	17,804	97	17,707
Arkansas	19,501	81	19,420
California	99,711	1,509	98,202
Colorado	7,161	37	7,124
Connecticut	6,898	35	6,863
Delaware	3,334	7	3,327
District of Columbia	4,441	10	4,431
Florida	80,608	169	80,439
Georgia	35,046	223	34,823
Hawaii	1,557	29	1,528
Idaho	4,296	24	4,272
Illinois	45,096	197	44,899
Indiana	21,545	77	21,468
Iowa	7,124	80	7,044
Kansas	7,302	26	7,276
Kentucky	27,797	108	27,689
Louisiana	29,343	94	29,249
Maine	3,504	30	3,474
Maryland	15,275	37	15,238
Massachusetts	19,129	427	18,702
Michigan	38,719	121	38,598
Minnesota	11,212	73	11,139
Mississippi	22,853	61	22,792
Missouri	20,269	85	20,184
Montana	2,091	12	2,079
Nebraska	3,533	28	3,505
Nevada	6,193	96	6,097
New Hampshire	1,953	19	1,934
New Jersey	22,704	51	22,653
New Mexico	7,762	35	7,727
New York	73,422	149	73,273
North Carolina	38,294	138	38,156
North Dakota	989	7	982
Ohio	43,565	158	43,407
Oklahoma	14,592	84	14,508
Oregon	8,321	71	8,250
Pennsylvania	60,991	150	60,841
Rhode Island	4,232	11	4,221
South Carolina	18,731	156	18,575
South Dakota	2,020	9	2,011
Tennessee	23,411	150	23,261
Texas	95,709	1,095	94,614
Utah	4,219	34	4,185
Vermont	1,723	8	1,715
Virginia	22,810	81	22,729
Washington	15,217	62	15,155
West Virginia	8,936	60	8,876
Wisconsin	17,111	63	17,048
Wyoming	861	a	a
Outlying area			
Northern Mariana Islands	233	a	a

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

a. Data not shown to avoid disclosure of information for particular individuals.

CONTACT: Art Kahn (410) 965-0186.

**Table 7.B9—Number of federally administered awards, by state or other area, eligibility category, and age, 2006**

State or area	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18-64	65 or older
All areas	838,448	110,264	4,151	724,033	170,453	556,140	111,855
Alabama	19,440	1,087	36	18,317	3,746	14,590	1,104
Alaska	1,703	198	5	1,500	288	1,213	202
Arizona	12,028	1,237	44	10,747	2,705	8,072	1,251
Arkansas	12,703	690	32	11,981	3,295	8,705	703
California	107,864	32,444	835	74,585	14,456	60,572	32,836
Colorado	7,632	904	26	6,702	1,447	5,272	913
Connecticut	6,791	667	37	6,087	1,121	4,996	674
Delaware	1,933	112	7	1,814	533	1,287	113
District of Columbia	3,160	227	11	2,922	690	2,236	234
Florida	51,932	10,623	116	41,193	10,895	30,236	10,801
Georgia	23,398	2,216	108	21,074	4,693	16,435	2,270
Hawaii	2,943	651	18	2,274	260	2,021	662
Idaho	3,606	253	17	3,336	856	2,496	254
Illinois	28,051	2,772	204	25,075	6,446	18,804	2,801
Indiana	14,429	645	54	13,730	3,336	10,439	654
Iowa	5,517	444	28	5,045	1,300	3,765	452
Kansas	5,712	358	35	5,319	1,383	3,970	359
Kentucky	18,595	1,097	57	17,441	4,210	13,259	1,126
Louisiana	17,644	1,330	95	16,219	4,311	11,975	1,358
Maine	3,846	208	18	3,620	634	3,004	208
Maryland	12,983	1,396	37	11,550	2,626	8,942	1,415
Massachusetts	20,843	2,684	138	18,021	3,568	14,573	2,702
Michigan	26,219	1,759	89	24,371	5,915	18,524	1,780
Minnesota	10,626	1,234	49	9,343	2,185	7,187	1,254
Mississippi	12,420	863	31	11,526	2,975	8,571	874
Missouri	16,692	888	97	15,707	3,299	12,497	896
Montana	2,328	162	13	2,153	446	1,716	166
Nebraska	3,236	251	33	2,952	644	2,338	254
Nevada	5,666	900	51	4,715	1,098	3,661	907
New Hampshire	2,961	91	22	2,848	446	2,424	91
New Jersey	18,996	3,424	63	15,509	3,657	11,875	3,464
New Mexico	6,940	700	28	6,212	1,422	4,810	708
New York	59,640	13,433	149	46,058	10,488	35,544	13,608
North Carolina	25,795	1,965	109	23,721	5,553	18,242	2,000
North Dakota	1,136	117	3	1,016	220	795	121
Ohio	29,002	1,619	65	27,318	6,322	21,015	1,665
Oklahoma	11,783	717	43	11,023	2,633	8,414	736
Oregon	7,821	988	43	6,790	1,487	5,329	1,005
Pennsylvania	40,275	2,893	132	37,250	10,632	26,709	2,934
Rhode Island	3,337	426	13	2,898	649	2,255	433
South Carolina	11,804	842	120	10,842	2,509	8,438	857
South Dakota	1,663	199	11	1,453	433	1,029	201
Tennessee	20,142	1,290	121	18,731	3,444	15,376	1,322
Texas	75,934	8,427	672	66,835	18,942	48,433	8,559
Utah	3,919	307	15	3,597	862	2,743	314
Vermont	1,809	119	4	1,686	348	1,341	120
Virginia	18,573	1,816	94	16,663	3,568	13,165	1,840
Washington	16,265	1,492	43	14,730	2,903	11,830	1,532
West Virginia	7,968	331	32	7,605	1,436	6,191	341
Wisconsin	11,765	703	40	11,022	2,945	8,106	714
Wyoming	882	44	8	830	152	684	46
Outlying area							
Northern Mariana Islands	93	20	0	73	40	33	20
Unknown	5	1	0	4	1	3	1

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: Clark Pickett (410) 965-9016.

## 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 2006**

Monthly payment (dollars)	All recipients	Adults			Blind and disabled, under age 18
		Aged	Blind	Disabled	
<b>Total</b>					
Number	6,421,668	872,966	58,002	4,414,346	1,076,354
Percent	100.0	100.0	100.0	100.0	100.0
Less than 50	7.8	12.8	8.5	8.2	2.0
50–99	5.4	9.9	5.6	5.7	0.8
100–149	4.8	9.2	4.9	4.8	1.0
150–199	4.0	7.8	4.2	3.9	1.3
200–249	3.5	5.6	3.7	3.5	1.5
250–299	3.3	4.7	4.4	3.5	1.7
300–349	2.8	4.0	2.9	2.7	2.1
350–399	2.5	3.0	2.7	2.4	2.6
400–449	7.4	11.0	8.4	6.6	7.6
450–499	2.1	1.6	1.9	1.5	4.8
500–549	2.0	1.1	1.5	1.4	5.6
550–602	2.1	0.8	1.4	1.5	5.9
603 <sup>a</sup>	52.3	28.6	50.1	54.3	63.1

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 \$603 in calendar year 2006.

CONTACT: Art Kahn (410) 965-0186.

**Table 7.C2—Number and percentage distribution of couples receiving federal SSI payments, by monthly payment and eligibility category, December 2006**

Monthly payment (dollars)	All recipients	Aged	Blind	Disabled
<b>Total</b>				
Number	258,808	120,375	2,420	136,013
Percent	100.0	100.0	100.0	100.0
Less than 50	3.7	3.9	3.0	3.6
50–99	4.2	4.4	2.9	4.1
100–149	4.3	4.4	3.5	4.3
150–199	4.4	4.4	3.9	4.4
200–249	4.1	4.0	3.9	4.2
250–299	3.8	3.5	3.4	4.1
300–349	3.8	3.0	3.6	4.4
350–399	3.4	2.7	3.4	4.0
400–449	2.9	2.5	3.2	3.4
450–499	2.4	2.3	2.5	2.5
500–549	2.2	2.1	2.1	2.3
550–599	2.0	1.8	2.6	2.2
600–649	6.2	9.8	4.1	2.9
650–699	1.5	1.3	2.0	1.7
700–749	1.3	1.2	1.4	1.4
750–799	1.0	1.0	1.2	1.0
800–849	1.0	1.2	1.0	0.7
850–903	0.9	1.2	0.8	0.7
904 <sup>a</sup>	46.8	45.4	51.5	47.9

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 \$904 in calendar year 2006.

CONTACT: Art Kahn (410) 965-0186.

**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 2006**

Type of income	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older <sup>a</sup>
Number	7,235,583	1,211,656	73,418	5,950,509	1,078,977	4,152,130	2,004,476
<b>Number</b>							
With unearned income							
Social Security benefits	2,528,975	692,332	26,913	1,809,730	77,401	1,309,629	1,141,945
Other	818,701	218,660	7,421	592,620	207,682	320,602	290,417
With earned income	275,252	18,236	4,319	252,697	3,024	244,228	28,000
<b>Percentage</b>							
With unearned income							
Social Security benefits	35.0	57.1	36.7	30.4	7.2	31.5	57.0
Other	11.3	18.0	10.1	10.0	19.2	7.7	14.5
With earned income	3.8	1.5	5.9	4.2	0.3	5.9	1.4
<b>Average income (dollars)</b>							
With unearned income							
Social Security benefits	462.49	457.69	478.15	464.11	206.47	482.78	456.70
Other	136.87	114.28	124.19	145.45	186.11	127.86	111.66
With earned income	300.34	360.77	478.57	292.86	335.76	301.36	287.81

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: See section SSI: History of Provisions for discussion of income.

a. Includes approximately 16,200 blind and 776,600 disabled persons aged 65 or older.

CONTACT: Art Kahn (410) 965-0186.

## 7.D SSI: Other Income Sources

**Table 7.D2—Percentage of persons receiving both federally administered payments and Social Security benefits, average monthly amount of benefits, by state or other area, eligibility category, and age, December 2006**

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	35.0	57.1	36.7	30.4	7.2	31.5	57.0	462.49	457.69	478.15	464.11	206.47	482.78	456.70	
Alabama	39.4	86.5	45.2	34.0	9.3	34.8	78.8	447.55	461.15	428.21	443.79	212.21	462.22	451.67	
Alaska	34.9	63.4	39.2	28.3	7.4	28.5	60.4	444.18	443.07	434.81	444.93	225.96	461.63	435.08	
Arizona	32.2	59.8	31.9	27.8	7.4	29.0	58.8	423.41	405.86	424.04	429.39	206.38	454.61	406.52	
Arkansas	40.2	89.2	42.7	34.8	9.1	37.1	82.3	448.81	468.49	427.94	443.47	207.88	463.52	457.17	
California	39.0	50.2	38.3	34.2	5.3	34.8	50.0	527.48	487.56	564.54	551.52	246.19	572.02	498.55	
Colorado	36.1	53.9	33.0	32.9	5.5	34.1	56.6	452.05	443.96	439.07	454.62	225.59	466.33	441.71	
Connecticut	30.9	44.8	29.6	29.0	7.6	29.3	48.0	434.09	417.70	433.36	437.83	198.54	454.09	422.13	
Delaware	32.2	61.8	39.6	29.1	7.3	33.4	62.6	456.23	454.73	446.25	456.67	206.66	480.14	452.62	
District of Columbia	24.7	65.9	32.5	20.5	6.2	19.8	59.4	441.89	435.71	448.57	443.82	255.13	469.88	434.45	
Florida	33.0	49.3	36.5	27.9	7.2	30.8	50.5	428.92	419.62	429.48	434.02	210.41	457.76	421.53	
Georgia	37.2	73.4	35.6	31.8	6.6	31.8	71.1	454.51	461.43	428.80	452.41	220.83	468.99	454.22	
Hawaii	32.8	46.4	34.8	27.3	6.2	26.1	47.7	471.02	439.28	513.96	491.70	232.66	511.63	443.58	
Idaho	35.6	77.6	36.9	32.0	8.0	35.2	73.7	447.82	469.81	420.13	443.40	186.77	459.53	458.18	
Illinois	24.9	42.2	26.4	22.6	6.2	23.6	43.0	427.67	413.35	417.68	431.37	198.00	447.03	424.75	
Indiana	32.0	71.4	35.9	29.6	7.4	33.2	68.3	440.98	455.53	424.00	439.01	188.68	455.01	451.70	
Iowa	39.2	74.3	41.2	36.0	7.4	39.1	71.7	456.86	475.74	455.70	453.32	197.32	464.43	466.59	
Kansas	36.1	65.5	35.4	33.5	7.8	37.1	64.3	447.18	459.93	411.39	445.30	195.68	458.52	456.12	
Kentucky	35.4	83.0	36.4	31.6	9.4	30.6	74.4	434.04	452.46	414.53	430.36	184.87	450.79	435.37	
Louisiana	34.6	82.3	37.1	28.8	7.2	28.7	74.6	432.12	446.97	440.25	426.86	220.16	443.15	438.06	
Maine	43.1	85.7	36.8	39.8	15.5	38.9	80.4	451.48	472.51	430.99	448.05	167.18	463.20	462.22	
Maryland	28.3	44.1	35.5	25.3	6.3	25.9	47.4	441.57	427.79	458.18	445.98	217.06	462.77	433.89	
Massachusetts	37.1	54.4	42.6	30.8	11.0	34.3	53.9	495.76	499.18	515.83	492.76	193.85	509.22	501.26	
Michigan	31.2	55.2	33.8	29.3	7.8	31.1	56.8	452.77	458.46	441.15	452.02	192.20	466.98	458.88	
Minnesota	31.8	45.7	30.2	29.6	8.0	32.5	45.3	440.29	445.56	431.18	439.09	183.02	454.86	441.02	
Mississippi	40.2	89.5	49.0	33.7	8.7	33.7	80.1	441.06	457.37	425.20	435.62	209.45	456.16	445.21	
Missouri	36.6	73.8	38.1	33.5	8.8	35.5	69.7	440.70	460.68	422.19	437.15	187.84	452.25	449.96	
Montana	38.6	82.0	39.7	35.3	7.1	36.2	76.4	460.17	468.61	439.46	458.83	237.70	471.48	454.95	
Nebraska	40.1	72.7	35.7	36.9	8.5	40.1	68.4	451.39	464.13	429.21	449.10	204.84	460.62	457.57	
Nevada	32.5	58.1	35.7	23.3	5.8	28.6	57.7	467.43	472.72	511.07	460.92	220.12	477.95	473.10	
New Hampshire	37.2	62.5	38.9	35.5	15.0	36.4	65.2	445.40	427.72	440.54	447.51	181.36	465.39	445.27	
New Jersey	31.9	42.7	38.1	28.9	6.5	30.4	45.5	457.75	435.91	469.74	466.68	227.42	486.94	441.83	
New Mexico	39.0	73.3	35.9	32.8	6.9	32.1	68.8	425.54	416.57	407.77	429.41	202.37	448.31	415.24	
New York	32.8	48.7	38.9	28.4	6.1	28.7	47.2	484.78	460.07	489.21	496.20	211.25	520.55	464.53	
North Carolina	40.4	82.5	38.8	34.6	8.0	36.2	76.9	446.51	461.70	423.26	441.77	209.76	461.50	449.20	
North Dakota	44.4	77.7	37.8	40.0	5.3	41.8	73.6	442.22	451.62	408.73	440.04	176.54	448.57	442.12	
Ohio	28.6	58.8	34.7	26.6	6.7	27.8	57.9	432.42	441.16	422.82	431.26	188.43	444.21	438.92	
Oklahoma	35.3	78.9	37.6	30.8	7.3	31.9	73.4	439.62	453.61	421.85	436.06	200.59	451.66	444.11	
Oregon	34.6	55.8	36.9	31.4	5.9	33.3	56.7	449.72	445.71	419.63	451.22	215.06	461.04	444.62	
Pennsylvania	29.3	62.0	35.3	26.1	8.0	27.1	58.2	451.73	482.66	446.04	444.57	189.17	464.83	467.51	
Rhode Island	38.1	64.4	39.9	34.2	8.7	35.4	62.4	491.93	515.38	500.56	485.34	195.54	504.21	497.70	
South Carolina	39.0	85.1	39.8	33.1	7.3	33.7	77.2	442.65	451.31	429.98	440.03	218.18	455.74	444.27	
South Dakota	40.5	68.1	31.5	36.5	6.6	39.1	66.6	438.56	473.16	484.50	428.58	184.35	444.25	446.80	
Tennessee	38.4	83.4	34.1	33.4	8.0	32.9	75.4	444.88	458.00	421.59	441.48	210.69	458.06	444.48	
Texas	37.4	68.2	31.3	29.3	5.7	30.3	67.6	426.69	418.82	411.77	431.87	208.88	454.52	417.42	
Utah	30.5	48.5	28.2	28.5	5.8	31.8	51.3	435.10	418.48	402.32	438.70	205.04	453.12	421.13	
Vermont	46.2	84.0	52.8	42.7	10.6	43.7	80.0	490.47	504.45	482.85	488.00	195.23	503.22	492.05	
Virginia	35.9	58.2	37.1	32.0	8.3	33.0	60.5	441.57	446.67	421.25	440.19	207.11	457.38	442.52	
Washington	27.7	35.2	30.8	26.6	6.3	28.2	38.3	446.74	428.30	429.28	450.53	210.24	464.04	433.26	
West Virginia	32.2	82.4	33.2	29.4	10.1	27.7	69.6	436.67	461.30	424.07	432.97	185.25	446.29	445.60	
Wisconsin	35.4	66.8	35.1	32.4	6.7	36.0	64.1	448.28	456.96	434.80	446.71	189.25	459.29	454.03	
Wyoming	39.1	85.5	28.6	35.6	8.2	37.1	80.4	449.73	476.67	399.17	445.01	229.78	453.71	463.34	
Outlying area															
Northern Mariana Islands	24.9	64.2	33.3	17.5	1.7	24.7	59.4	317.63	317.48	371.25	315.82	164.50	339.62	301.74	

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: Art Kahn (410) 965-0186.



**Table 7.E2—Percentage distribution of federally administered awards, by sex, age, and eligibility category, 2006**

Sex and age	Total	Adults			Blind and disabled children <sup>a</sup>
		Aged	Blind	Disabled	
<b>All persons</b>					
Number	838,448	110,264	3,531	548,527	176,126
Percent	100.0	100.0	100.0	100.0	100.0
<i>Percentage distribution by sex</i>					
Male	51.6	38.2	52.5	50.2	64.2
Female	48.4	61.8	47.5	49.8	35.8
<i>Percentage distribution by age</i>					
Under 5	8.5	...	...	...	40.4
5–9	5.6	...	...	...	26.8
10–14	4.4	...	...	...	20.7
15–17	1.9	...	...	...	8.8
18–21	5.3	...	15.2	7.0	3.2
22–29	6.0	...	10.0	9.0	...
30–39	9.6	...	14.7	14.5	...
40–49	17.6	...	21.6	26.7	...
50–59	22.2	...	28.2	33.8	...
60–64	5.6	...	7.3	8.6	...
65–69	7.3	54.3	0.9	0.3	...
70–74	2.7	20.8	0.8	<sup>b</sup>	...
75–79	1.6	12.3	0.5	<sup>b</sup>	...
80 or older	1.7	12.7	0.9	<sup>b</sup>	...
<b>Male</b>					
Number	432,361	42,124	1,853	275,329	113,055
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	9.9	...	...	...	38.0
5–9	7.7	...	...	...	29.6
10–14	5.6	...	...	...	21.5
15–17	2.1	...	...	...	8.0
18–21	5.9	...	15.7	8.0	2.9
22–29	6.2	...	11.2	9.6	...
30–39	9.0	...	15.2	14.0	...
40–49	16.9	...	23.2	26.4	...
50–59	21.5	...	27.0	33.5	...
60–64	5.3	...	6.1	8.2	...
65–69	5.6	56.4	0.5	0.2	...
70–74	2.2	22.4	0.3	<sup>b</sup>	...
75–79	1.2	11.9	0.3	<sup>b</sup>	...
80 or older	0.9	9.2	0.4	<sup>b</sup>	...

(Continued)

## 7.E SSI: Recipient Characteristics

**Table 7.E2—Percentage distribution of federally administered awards, by sex, age, and eligibility category, 2006—Continued**

Sex and age	Total	Adults			Blind and disabled children <sup>a</sup>
		Aged	Blind	Disabled	
		<i>Female</i>			
Number	406,087	68,140	1,678	273,198	63,071
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	7.0	...	...	...	44.8
5–9	3.4	...	...	...	21.7
10–14	3.0	...	...	...	19.3
15–17	1.6	...	0.1	...	10.3
18–21	4.7	...	14.7	6.0	3.9
22–29	5.7	...	8.7	8.4	...
30–39	10.2	...	14.1	15.0	...
40–49	18.3	...	19.8	27.1	...
50–59	23.1	...	29.4	34.1	...
60–64	6.1	...	8.5	9.0	...
65–69	9.1	52.9	1.4	0.3	...
70–74	3.3	19.8	1.3	b	...
75–79	2.1	12.5	0.7	b	...
80 or older	2.5	14.8	1.4	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.

**Table 7.E3—Number and percentage distribution of recipients of federally administered payments, by sex, age, and eligibility category, December 2006**

Sex and age	All recipients	Adults			Blind and disabled, under age 18
		Aged	Blind	Disabled	
<b>All persons</b>					
Number	7,235,583	1,211,656	66,994	4,877,956	1,078,977
Percent	100.0	100.0	100.0	100.0	100.0
<i>Percentage distribution by sex</i>					
Male	43.5	31.8	44.5	41.5	65.6
Female	56.5	68.2	55.5	58.5	34.4
<i>Percentage distribution by age</i>					
Under 5	2.3	...	...	...	15.3
5-9	4.2	...	...	...	27.9
10-14	5.1	...	...	...	34.3
15-17	3.4	...	...	...	22.5
18-21	4.2	...	5.7	6.1	...
22-29	7.1	...	12.9	10.4	...
30-39	9.0	...	13.4	13.1	...
40-49	14.3	...	16.8	21.0	...
50-59	16.0	...	18.8	23.4	...
60-64	6.8	...	8.1	10.0	...
65-69	7.2	15.1	6.8	6.9	...
70-74	6.7	22.0	5.7	4.4	...
75-79	5.9	24.1	4.9	2.6	...
80 or older	7.9	38.8	6.8	2.0	...
<b>Male</b>					
Number	3,145,335	385,355	29,782	2,022,810	707,388
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	3.0	...	...	...	13.5
5-9	6.5	...	...	...	28.7
10-14	8.0	...	...	...	35.5
15-17	5.0	...	...	...	22.3
18-21	5.6	...	7.1	8.7	...
22-29	8.7	...	15.2	13.4	...
30-39	9.5	...	15.4	14.5	...
40-49	14.0	...	18.8	21.5	...
50-59	14.4	...	18.5	22.1	...
60-64	5.6	...	7.4	8.6	...
65-69	5.8	17.7	5.9	5.6	...
70-74	5.2	24.9	4.4	3.2	...
75-79	4.2	25.6	3.4	1.7	...
80 or older	4.5	31.8	3.9	0.8	...
<b>Female</b>					
Number	4,090,248	826,301	37,212	2,855,146	371,589
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	1.7	...	...	...	18.8
5-9	2.4	...	...	...	26.3
10-14	2.9	...	...	...	32.1
15-17	2.1	...	...	...	22.8
18-21	3.0	...	4.7	4.3	...
22-29	5.9	...	11.0	8.3	...
30-39	8.6	...	11.8	12.1	...
40-49	14.6	...	15.2	20.7	...
50-59	17.2	...	19.1	24.4	...
60-64	7.8	...	8.7	11.0	...
65-69	8.3	13.9	7.5	7.8	...
70-74	7.9	20.6	6.7	5.3	...
75-79	7.1	23.4	6.1	3.3	...
80 or older	10.5	42.1	9.2	2.8	...

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.

## 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 2006**

Category and age	Number			Percentage distribution		
	Total	With representative payee	Without representative payee	Total	With representative payee	Without representative payee
Total	7,235,583	2,652,012	4,583,571	100.0	36.7	63.3
Category						
Aged	1,211,656	44,548	1,167,108	100.0	3.7	96.3
Blind <sup>a</sup>	73,418	19,597	53,821	100.0	26.7	73.3
Disabled <sup>b</sup>	5,950,509	2,587,867	3,362,642	100.0	43.5	56.5
Age						
Under 18	1,078,977	1,078,161	816	100.0	99.9	0.1
18–64	4,152,130	1,416,427	2,735,703	100.0	34.1	65.9
65 or older	2,004,476	157,424	1,847,052	100.0	7.9	92.1

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

- a. Includes 16,200 persons aged 65 or older.
- b. Includes 776,600 persons aged 65 or older.

CONTACT: Arthur Kahn (410) 965-0186.

**Table 7.E5—Number and percentage distribution of persons receiving federally administered payments, by living arrangement, eligibility category, and age, December 2006**

Living arrangement <sup>a</sup>	Number	Category			Age		
		Aged	Blind <sup>b</sup>	Disabled <sup>c</sup>	Under 18	18–64	65 or older
Total							
Number	7,235,583	1,211,656	73,418	5,950,509	1,078,977	4,152,130	2,004,476
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Own household	93.4	90.3	91.8	94.1	94.9	93.7	92.0
Another's household	4.7	8.2	5.8	4.0	3.8	4.5	5.6
Institutional care covered by Medicaid	1.9	1.6	2.3	1.9	1.3	1.8	2.4

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 16,200 persons aged 65 or older.
- c. Includes 776,600 persons aged 65 or older.

CONTACT: Arthur Kahn (410) 965-0186.

**Table 7.E6—Number of noncitizens receiving federally administered payments as a percentage of SSI recipients, by eligibility category, December 1982–2006, 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

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: Alfreda Brooks (410) 965-9849.



## Section 8. Health Care Programs

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### **Medicare**

Trust Funds	8.1
Enrollment, Utilization, and Reimbursement	8.5
Participating Facilities	8.28

### **Medicaid**

Recipients	8.34
State Data	8.38





Table 8.A1—Hospital Insurance, calendar years 1966–2006 (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 <sup>a,b</sup>	Total	Benefit payments <sup>b,c</sup>	Administrative expenses		
					Uninsured persons	Military wage credits					Amount <sup>d</sup>	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	<sup>e</sup> 803	141	9	746	13,679	13,340	339	2.5	10,605
1977	15,856	14,114	...	<sup>f</sup> 214	<sup>e</sup> 803	<sup>g</sup> 143	12	784	16,019	15,737	283	1.8	10,442
1978	19,213	17,324	...	<sup>f</sup> 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	<sup>h</sup> 8,164
1983	44,570	37,259	...	358	878	<sup>i</sup> 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	<sup>j</sup> -719	41	3,362	48,414	47,580	834	1.8	<sup>h</sup> 20,499
1986	59,267	54,583	...	364	566	91	43	3,619	50,422	49,758	664	1.3	<sup>h</sup> 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	<sup>k</sup> -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	<sup>l</sup> 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	<sup>m</sup> -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	<sup>n</sup> 133,990	1,782	1.3	120,419
1999	151,597	132,306	6,552	430	652	71	1,447	10,139	130,632	<sup>n</sup> 128,766	1,866	1.4	141,385

(Continued)

## 8.A Medicare: Trust Funds

**Table 8.A1—Hospital Insurance, calendar years 1966–2006 (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 <sup>a,b</sup>	Total	Benefit payments <sup>b,c</sup>	Administrative expenses		
					Uninsured persons	Military wage credits					Amount <sup>d</sup>	Percentage of benefit payments	
2000	167,185	144,351	8,787	465	470	2	1,382	11,729	131,095	<sup>n</sup> 128,458	2,636	2.1	177,475
2001	174,630	151,994	7,533	470	453	<sup>o</sup> -1,175	1,370	13,986	143,379	<sup>n</sup> 141,183	2,195	1.6	208,726
2002	178,631	152,708	8,316	425	442	0	1,626	15,114	152,526	<sup>n</sup> 149,944	2,582	1.7	234,831
2003	175,812	149,242	8,318	426	393	0	1,604	15,828	154,616	<sup>n</sup> 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	180,013	2,920	1.6	285,770
2006	211,515	181,274	10,319	471	408	0	2,645	16,398	191,933	188,989	2,944	1.6	305,352

SOURCE: 2007 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 2007 Annual Report displays dollars rounded to the tenths of billions, an analogous unpublished table displaying dollars rounded to the millions was also used.

NOTES: Totals do not necessarily equal the sums 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 a small amount 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.) 104-91.
- 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.

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Table 8.A2—Supplementary Medical Insurance, calendar years 1966–2006 (in millions of dollars)

Year	Receipts								Expenditures				Trust fund assets at end of year <sup>a</sup>
	Total	Premiums from participants <sup>b</sup>				Government contributions <sup>c</sup>	Transfers from states <sup>d</sup>	Interest and other income <sup>e,f</sup>	Total	Benefit payments <sup>g,h</sup>	Administrative expenses		
		Subtotal	Part B		Part D <sup>b</sup>						Amount	Percent-age 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	<sup>i</sup> 3,722	<sup>i</sup> 3,356	<sup>i</sup> 366	...	<sup>i</sup> 11,291	...	361	14,028	13,113	915	7.0	5,877
1982	16,580	<sup>i</sup> 3,697	<sup>i</sup> 3,341	<sup>i</sup> 356	...	<sup>i</sup> 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	<sup>j</sup> 7,409	<sup>j</sup> 6,747	<sup>j</sup> 661	...	<sup>j</sup> 23,560	...	876	31,740	30,820	921	3.0	8,394
1988	35,825	<sup>j</sup> 8,761	<sup>j</sup> 7,983	<sup>j</sup> 778	...	<sup>j</sup> 26,203	...	861	35,229	33,970	1,260	3.7	8,990
1989	<sup>k</sup> 44,349	<sup>k,l</sup> 12,263	9,793	993	...	30,852	...	<sup>k</sup> 1,234	<sup>k</sup> 39,783	38,294	<sup>k</sup> 1,489	3.9	<sup>k</sup> 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	<sup>m</sup> 14,077	<sup>m</sup> 12,814	<sup>m</sup> 1,263	...	<sup>m</sup> 41,359	...	1,801	50,830	49,260	1,570	3.2	24,235
1993	57,679	<sup>m</sup> 14,193	<sup>m</sup> 12,731	<sup>m</sup> 1,462	...	<sup>m</sup> 41,465	...	2,021	57,783	<sup>n</sup> 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	<sup>o</sup> 20,933	<sup>o</sup> 18,594	<sup>o</sup> 2,338	...	<sup>o</sup> 64,068	...	2,711	77,630	<sup>p</sup> 76,125	1,505	2.0	46,212
1999	80,902	<sup>o</sup> 18,967	<sup>o</sup> 16,604	<sup>o</sup> 2,362	...	<sup>o</sup> 59,095	...	2,841	82,327	<sup>p</sup> 80,724	1,603	2.0	44,787

(Continued)

## 8.A Medicare: Trust Funds

**Table 8.A2—Supplementary Medical Insurance, calendar years 1966–2006 (in millions of dollars)—Continued**

Year	Receipts								Expenditures				Trust fund assets at end of year <sup>a</sup>
	Total	Premiums from participants <sup>b</sup>				Government contributions <sup>c</sup>	Transfers from states <sup>d</sup>	Interest and other income <sup>e,f</sup>	Total	Benefit payments <sup>f,g,h</sup>	Administrative expenses		
		Subtotal	Part B		Part D <sup>b</sup>						Amount	Percentage of benefit payments	
			Aged	Disabled									
2000	89,903	20,555	17,892	2,664	...	<sup>o</sup> 65,898	...	3,450	90,663	<sup>p</sup> 88,893	1,770	2.0	44,027
2001	98,629	22,764	19,905	2,859	...	72,793	...	3,071	101,386	<sup>p</sup> 99,663	1,723	1.7	41,270
2002	106,196	25,066	21,610	3,456	...	78,338	...	2,792	113,165	<sup>p</sup> 110,969	2,196	2.0	34,301
2003	115,796	27,402	23,546	3,856	...	86,402	...	1,992	126,144	<sup>p</sup> 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
2005	158,089	37,535	31,722	5,813	...	119,189	...	1,365	153,511	150,326	3,185	2.1	24,008
2006	225,492	<sup>q</sup> 46,303	36,346	6,507	<sup>q</sup> 3,450	171,910	5,474	1,804	216,381	<sup>q</sup> 213,012	3,369	1.6	33,119

SOURCES: 2007 Annual Report of the Boards of Trustees of the Federal Supplementary Medical 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 2007 Annual Report displays dollars rounded to the tenths of billions, an analogous unpublished table displaying dollars rounded to the millions was also used.

NOTES: Totals do not necessarily equal the sums 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 other certain 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 2004–2006.
- 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 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 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.
- 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 2004–2006.
- i. Section 708 of Title VII of the Social Security Act modified 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 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 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. Catastrophic coverage premiums—\$1.5 billion—not distributed between aged and disabled enrollees are included in total.
- m. Delivery of benefit checks normally due January 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 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. Includes an estimated \$2,266 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.B1—Hospital Insurance and/or Supplementary Medical Insurance: Aged persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1967–2004**

Type of coverage and service	1967	1975	1980	1990	2000	2004
<i>Persons enrolled (fee-for-service and managed care) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	19,521	22,790	25,515	30,948	34,261	35,328
Hospital Insurance	19,494	22,472	25,104	30,464	33,841	34,990
Supplementary Medical Insurance	17,893	21,945	24,680	29,685	32,602	33,436
<i>Persons enrolled (fee-for-service only) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	--	--	--	--	27,833	30,309
Hospital Insurance	--	--	--	--	27,422	29,975
Supplementary Medical Insurance	--	--	--	--	26,174	28,416
<i>Persons served (thousands)<sup>a</sup></i>						
Hospital Insurance and/or Supplementary Medical Insurance	7,154	12,032	16,271	24,809	25,486	27,851
Hospital Insurance	3,960	4,963	6,024	6,367	6,361	6,933
Inpatient hospital	3,601	4,913	5,951	5,906	5,975	6,418
Skilled nursing services	354	260	248	615	1,390	1,636
Home health services <sup>b</sup>	126	329	675	1,818	1,325	1,530
Hospice services <sup>c</sup>	...	...	...	--	514	757
Supplementary Medical Insurance	6,523	11,762	16,099	24,687	25,256	27,617
Physicians' and other medical services	6,415	11,396	15,627	24,193	24,846	27,284
Outpatient services	1,511	3,768	6,629	14,055	18,159	20,249
Home health services <sup>b</sup>	118	161	302	38	1,081	1,137
<i>Persons served per 1,000 enrollees</i>						
Hospital Insurance and/or Supplementary Medical Insurance	367	528	638	802	916	919
Hospital Insurance	203	221	240	209	232	231
Inpatient hospital	185	219	237	94	218	214
Skilled nursing services	18	12	10	21	51	55
Home health services <sup>b</sup>	7	15	27	60	48	51
Hospice services <sup>c</sup>	...	...	...	--	19	25
Supplementary Medical Insurance	365	536	652	832	965	972
Physicians' and other medical services	359	519	633	815	949	960
Outpatient services	77	172	269	474	694	713
Home health services <sup>b</sup>	7	7	12	1	41	40
<i>Amount reimbursed (millions of dollars)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	4,239	12,689	29,134	88,778	148,488	213,241
Hospital Insurance	2,967	9,209	20,353	54,244	87,549	118,424
Inpatient hospital	2,659	8,840	19,583	48,952	72,041	91,184
Skilled nursing services	274	233	331	1,886	10,066	15,953
Home health services <sup>b</sup>	26	136	440	3,406	2,679	4,971
Hospice services <sup>c</sup>	...	...	...	--	2,763	6,316
Supplementary Medical Insurance	1,272	3,481	8,871	34,533	60,939	94,817
Physicians' and other medical services	1,224	3,050	7,361	27,379	44,506	66,815
Outpatient services	38	374	1,261	7,077	12,588	22,729
Home health services <sup>b</sup>	17	56	159	78	3,845	5,272
<i>Amount reimbursed per person served (dollars)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	592	1,055	1,791	3,578	5,826	7,656
Hospital Insurance	749	1,855	3,379	8,520	13,763	17,081
Inpatient hospital	738	1,799	3,291	8,289	12,057	14,207
Skilled nursing services	774	896	1,336	3,068	7,242	9,752
Home health services <sup>b</sup>	204	413	652	1,874	2,022	3,249
Hospice services <sup>c</sup>	...	...	...	--	5,375	8,344
Supplementary Medical Insurance	195	296	545	1,399	2,413	3,433
Physicians' and other medical services	191	268	471	1,132	1,791	2,449
Outpatient services	25	99	190	503	693	1,122
Home health services <sup>b</sup>	145	347	526	2,033	3,557	4,639

(Continued)

## 8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B1—Hospital Insurance and/or Supplementary Medical Insurance: Aged persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1967–2004—Continued**

Type of coverage and service	1967	1975	1980	1990	2000	2004
	<i>Amount reimbursed per enrollee (dollars)</i>					
Hospital Insurance and/or Supplementary Medical Insurance	217	557	1,142	2,869	5,335	7,036
Hospital Insurance	152	410	811	1,781	3,193	3,951
Inpatient hospital	137	394	780	1,607	2,627	3,042
Skilled nursing services	14	11	13	62	367	532
Home health services <sup>b</sup>	1	6	18	112	98	166
Hospice services <sup>c</sup>	...	...	...	--	101	211
Supplementary Medical Insurance	71	159	356	1,163	2,328	3,337
Physicians' and other medical services	69	139	298	922	1,700	2,351
Outpatient services	2	17	51	238	481	800
Home health services <sup>b</sup>	1	2	6	3	147	186

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.

... = not applicable; -- = not available.

- Does not reflect beneficiaries who received covered services, but for whom no program payments were reported. Numbers do not add by type of service because one beneficiary may have used several types of services.
- 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.
- The hospice care benefit was enacted in 1982. Therefore, for calendar years 1967, 1975, and 1980, hospice services were not applicable.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B2—Hospital Insurance and/or Supplementary Medical Insurance: Disabled persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1974–2004**

Type of coverage and service	1974	1975	1980	1990	2000	2004
<i>Persons enrolled (fee-for-service and managed care) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	1,928	2,168	2,963	3,255	5,371	6,401
Hospital Insurance	1,928	2,168	2,963	3,255	5,370	6,401
Supplementary Medical Insurance	1,745	1,959	2,719	2,943	4,768	5,665
<i>Persons enrolled (fee-for-service only) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	--	--	--	--	4,907	6,036
Hospital Insurance	--	--	--	--	4,907	6,036
Supplementary Medical Insurance	--	--	--	--	4,304	5,300
<i>Persons served (thousands)<sup>a</sup></i>						
Hospital Insurance and/or Supplementary Medical Insurance	792	975	1,760	2,390	4,096	5,164
Hospital Insurance	400	475	728	680	964	1,223
Inpatient hospital	397	472	721	644	942	1,193
Skilled nursing services	8	8	9	23	78	117
Home health services <sup>b</sup>	15	22	51	122	119	163
Hospice services <sup>c</sup>	...	...	...	--	27	40
Supplementary Medical Insurance	740	924	1,723	2,365	4,057	5,117
Physicians' and other medical services	691	865	1,631	2,249	3,917	4,982
Outpatient services	296	399	909	1,496	2,870	3,753
Home health services <sup>b</sup>	9	13	25	<sup>d</sup>	110	137
<i>Persons served per 1,000 enrollees</i>						
Hospital Insurance and/or Supplementary Medical Insurance	411	450	594	734	835	856
Hospital Insurance	208	219	246	209	196	203
Inpatient hospital	206	218	243	198	192	198
Skilled nursing services	4	4	3	7	16	19
Home health services <sup>b</sup>	8	10	17	38	24	27
Hospice services <sup>c</sup>	...	...	...	--	6	7
Supplementary Medical Insurance	424	471	634	804	943	965
Physicians' and other medical services	396	442	600	764	910	940
Outpatient services	170	204	334	508	667	708
Home health services <sup>b</sup>	5	7	9	<sup>d</sup>	26	26
<i>Amount reimbursed (millions of dollars)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	1,049	1,509	4,478	11,239	25,773	42,085
Hospital Insurance	694	987	2,765	6,694	14,114	21,323
Inpatient hospital	681	968	2,714	6,346	13,156	19,366
Skilled nursing services	7	9	13	85	555	1,089
Home health services <sup>b</sup>	6	10	38	264	239	508
Hospice services <sup>c</sup>	...	...	...	--	164	360
Supplementary Medical Insurance	355	522	1,713	4,545	11,660	20,762
Physicians' and other medical services	206	295	997	2,831	6,968	12,456
Outpatient services	145	221	701	1,714	4,198	7,606
Home health services <sup>b</sup>	3	5	16	<sup>d</sup>	493	700
<i>Amount reimbursed per person served (dollars)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	1,324	1,548	2,544	4,703	6,292	8,149
Hospital Insurance	1,735	2,077	3,798	9,847	14,641	17,431
Inpatient hospital	1,714	2,051	3,765	9,849	13,966	16,238
Skilled nursing services	936	1,049	1,571	3,702	7,115	9,344
Home health services <sup>b</sup>	399	478	733	2,156	2,008	3,112
Hospice services <sup>c</sup>	...	...	...	--	6,074	8,945
Supplementary Medical Insurance	479	565	994	1,922	2,874	4,057
Physicians' and other medical services	298	341	611	1,259	1,779	2,500
Outpatient services	490	554	771	1,146	1,463	2,027
Home health services <sup>b</sup>	345	420	619	<sup>d</sup>	4,482	5,118

(Continued)

## 8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B2—Hospital Insurance and/or Supplementary Medical Insurance: Disabled persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1974–2004—Continued**

Type of coverage and service	1974	1975	1980	1990	2000	2004
	<i>Amount reimbursed per enrollee (dollars)</i>					
Hospital Insurance and/or Supplementary Medical Insurance	544	696	1,511	3,453	5,252	6,972
Hospital Insurance	360	455	933	2,057	2,876	3,533
Inpatient hospital	353	446	916	1,950	2,681	3,208
Skilled nursing services	4	4	4	26	113	180
Home health services <sup>b</sup>	3	5	13	81	49	84
Hospice services <sup>c</sup>	...	...	...	--	33	60
Supplementary Medical Insurance	208	266	630	1,544	2,709	3,917
Physicians' and other medical services	118	151	639	962	1,619	2,350
Outpatient services	83	113	258	582	975	1,435
Home health services <sup>b</sup>	2	3	5	<sup>d</sup>	115	132

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.

-- = not available; . . . = not applicable.

- a. Does not reflect beneficiaries who received covered services, but for whom no program payments were reported. Numbers to not add by type of service 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. The hospice care benefit was enacted in 1982. Therefore, for calendar years 1974, 1975, and 1980, hospice services were not applicable.
- d. Sample population too small to yield valid calculated results.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B3a—Hospital Insurance and/or Supplementary Medical Insurance: Number of enrollees aged 65 or older, by census division and state or other area, July 1, 1980–2006, selected years (in thousands)**

Census division and state or area	1980	1990	1995	2000	2003	2004	2005	2006
Total								
All areas	25,515	30,948	33,142	34,253	35,008	35,334	35,777	36,317
United States <sup>a</sup>	25,027	30,350	32,492	33,549	34,261	34,571	34,994	35,515
New England	1,506	1,734	1,816	1,838	1,841	1,843	1,843	1,859
Connecticut	362	436	455	458	458	458	457	459
Maine	142	165	174	180	185	186	188	191
Massachusetts	715	795	825	829	822	819	815	819
New Hampshire	103	126	139	147	152	156	160	163
Rhode Island	125	145	149	148	146	145	143	144
Vermont	59	68	72	76	78	79	80	82
Middle Atlantic	4,496	5,084	5,267	5,282	5,279	5,277	5,258	5,290
New Jersey	851	1,006	1,058	1,070	1,073	1,073	1,070	1,079
New York	2,128	2,280	2,328	2,347	2,361	2,365	2,353	2,368
Pennsylvania	1,516	1,798	1,881	1,865	1,845	1,839	1,835	1,843
East North Central	4,462	5,224	5,500	5,552	5,599	5,625	5,650	5,711
Illinois	1,238	1,401	1,446	1,440	1,446	1,452	1,455	1,467
Indiana	579	685	725	736	746	751	759	770
Michigan	916	1,101	1,177	1,203	1,218	1,226	1,231	1,248
Ohio	1,162	1,387	1,471	1,480	1,486	1,489	1,492	1,505
Wisconsin	567	650	683	693	703	707	713	721
West North Central	2,186	2,424	2,510	2,519	2,532	2,542	2,561	2,589
Iowa	387	422	432	427	426	426	427	430
Kansas	304	337	348	347	345	345	347	349
Minnesota	479	544	570	583	595	600	606	617
Missouri	639	706	733	736	740	744	751	760
Nebraska	205	221	228	227	227	227	228	230
North Dakota	81	91	94	93	92	92	92	92
South Dakota	91	102	106	106	107	108	110	111
South Atlantic	4,179	5,536	6,091	6,410	6,630	6,730	6,884	7,013
Delaware	59	80	90	97	102	104	108	110
District of Columbia	71	71	70	66	64	63	62	62
Florida	1,579	2,174	2,396	2,493	2,558	2,596	2,641	2,663
Georgia	499	636	700	750	785	799	831	859
Maryland	381	496	542	570	589	596	602	611
North Carolina	588	786	878	939	980	997	1,025	1,054
South Carolina	279	383	428	463	486	496	516	533
Virginia	490	645	714	761	795	808	827	845
West Virginia	233	264	274	271	271	271	272	274
East South Central	1,613	1,887	2,000	2,060	2,107	2,128	2,174	2,213
Alabama	428	508	541	558	569	573	584	592
Kentucky	402	459	482	491	499	504	514	524
Mississippi	280	313	325	330	336	339	343	347
Tennessee	503	607	652	681	703	712	732	750
West South Central	2,363	2,880	3,120	3,274	3,369	3,414	3,472	3,546
Arkansas	303	343	356	359	362	365	370	377
Louisiana	380	460	488	498	504	507	492	499
Oklahoma	361	412	432	438	442	445	451	457
Texas	1,318	1,665	1,845	1,979	2,061	2,097	2,159	2,213
Mountain	1,043	1,490	1,726	1,906	2,028	2,079	2,154	2,213
Arizona	295	456	536	591	628	645	674	689
Colorado	244	324	367	403	424	434	447	462
Idaho	95	121	134	144	153	157	163	168
Montana	85	106	114	119	123	124	126	129
Nevada	65	128	172	209	236	246	253	261
New Mexico	114	160	182	200	211	215	222	228
Utah	108	147	168	183	193	198	206	212
Wyoming	38	47	54	57	60	60	61	62

## 8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B3a—Hospital Insurance and/or Supplementary Medical Insurance: Number of enrollees aged 65 or older, by census division and state or other area, July 1, 1980–2006, selected years (in thousands)—*Continued***

Census division and state or area	1980	1990	1995	2000	2003	2004	2005	2006
Pacific	3,157	4,082	4,444	4,697	4,865	4,924	4,993	5,076
Alaska	11	22	28	35	39	41	42	44
California	2,346	2,990	3,241	3,436	3,556	3,592	3,628	3,678
Hawaii	74	118	138	151	157	159	162	165
Oregon	300	390	422	432	446	453	463	473
Washington	426	562	614	643	667	679	697	716
Unknown	22	10	18	11	10	10	6	5
Outlying areas	270	344	383	420	448	459	467	478
Puerto Rico	263	337	367	401	427	436	444	454
Virgin Islands	4	6	8	9	10	11	11	12
Other	3	1	8	10	11	12	12	12
Foreign countries	217	254	268	284	299	304	316	323

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 because of differences in sources and methodology.

Totals do not necessarily equal the sums of rounded components.

a. Represents beneficiaries of the 50 states and the District of Columbia and beneficiaries with unknown residence.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B3b—Hospital Insurance and/or Supplementary Medical Insurance: Number of disabled enrollees, by census division and state or other area, July 1, 1980–2006, selected years (in thousands)**

Census division and state or area	1980	1990	1995	2000	2003	2004	2005	2006
Total								
All areas	2,963	3,255	4,393	5,367	6,079	6,395	6,723	7,022
United States <sup>a</sup>	2,863	3,149	4,266	5,208	5,912	6,225	6,548	6,846
New England	141	156	228	285	319	335	349	364
Connecticut	31	33	47	58	64	67	69	71
Maine	16	18	27	36	42	45	47	49
Massachusetts	64	72	108	131	144	150	156	162
New Hampshire	9	11	17	23	27	30	32	34
Rhode Island	14	14	19	24	27	28	29	30
Vermont	7	7	10	13	15	15	16	17
Middle Atlantic	493	473	603	731	814	848	878	912
New Jersey	91	86	110	133	147	153	157	162
New York	237	229	302	368	402	414	423	437
Pennsylvania	165	158	190	230	265	281	297	313
East North Central	486	561	715	823	916	962	1,009	1,053
Illinois	113	132	172	195	215	226	236	246
Indiana	63	77	99	117	132	138	146	153
Michigan	118	132	170	200	227	240	251	263
Ohio	141	156	196	221	241	251	262	273
Wisconsin	50	64	79	90	101	107	113	119
West North Central	180	211	280	338	387	408	431	450
Iowa	29	34	43	50	57	59	62	64
Kansas	22	26	35	43	49	52	55	57
Minnesota	35	44	60	72	82	87	91	96
Missouri	67	75	100	124	144	152	162	169
Nebraska	14	16	22	26	30	32	33	35
North Dakota	6	7	9	10	11	11	12	12
South Dakota	7	8	11	13	14	15	15	16
South Atlantic	545	607	834	1,075	1,236	1,301	1,372	1,426
Delaware	7	8	11	15	17	19	20	21
District of Columbia	8	7	8	10	10	11	11	11
Florida	147	165	232	311	363	384	405	416
Georgia	88	96	134	166	188	196	208	216
Maryland	41	46	60	75	85	89	93	97
North Carolina	91	106	149	194	225	237	252	263
South Carolina	51	59	81	105	121	127	135	141
Virginia	68	77	105	132	151	158	166	173
West Virginia	43	44	55	67	76	80	83	87
East South Central	246	287	397	495	570	602	636	665
Alabama	63	74	101	127	151	160	171	180
Kentucky	62	75	105	132	149	156	164	171
Mississippi	46	53	72	88	101	107	111	114
Tennessee	76	85	119	148	169	179	190	199
West South Central	288	317	452	539	614	655	696	743
Arkansas	45	48	67	80	90	96	102	108
Louisiana	63	71	93	104	116	122	118	125
Oklahoma	41	39	56	69	79	84	91	97
Texas	139	159	236	286	329	353	386	413
Mountain	112	148	228	284	327	349	374	394
Arizona	34	42	66	84	101	109	119	126
Colorado	24	34	54	65	69	72	75	78
Idaho	9	11	16	21	25	27	29	31
Montana	9	12	16	18	20	21	22	22
Nevada	8	13	22	30	37	41	44	46
New Mexico	15	19	28	34	39	41	45	47
Utah	9	13	20	24	27	29	31	34
Wyoming	3	4	7	8	9	9	10	10

## 8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B3b—Hospital Insurance and/or Supplementary Medical Insurance: Number of disabled enrollees, by census division and state or other area, July 1, 1980–2006, selected years (in thousands)—*Continued***

Census division and state or area	1980	1990	1995	2000	2003	2004	2005	2006
Pacific	367	388	529	637	726	766	803	839
Alaska	2	3	5	7	9	9	10	10
California	284	289	392	465	522	550	573	597
Hawaii	7	9	11	15	18	19	19	20
Oregon	31	34	47	57	68	72	77	80
Washington	43	53	74	93	109	116	124	131
Unknown	4	2	1	1	2	2	1	1
Outlying areas	88	93	111	139	152	155	159	160
Puerto Rico	88	92	110	136	148	151	154	156
Virgin Islands	--	1	1	1	2	2	2	2
Other	--	--	--	2	2	2	2	3
Foreign countries	12	14	14	14	15	15	16	16

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 because of differences in sources and methodology.

Totals do not necessarily equal the sums of rounded components.

-- = not available.

a. Represents beneficiaries of the 50 states and the District of Columbia and beneficiaries with unknown residence.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B4—Hospital Insurance and/or Supplementary Medical Insurance: Number of enrollees aged 65 or older, by program, age, sex, and race, July 1, 1980–2006, selected years (in thousands)**

Age, sex, and race	1980	1985	1990	1995	2000	2004	2005	2006
<i>Hospital Insurance and/or Supplementary Medical Insurance</i>								
Total	25,515	28,176	30,948	33,142	34,253	35,334	35,783	36,317
Age								
65–69	8,459	8,956	9,695	9,517	9,167	9,698	9,905	10,194
70–74	6,756	7,441	7,951	8,756	8,609	8,321	8,353	8,403
75–79	4,809	5,453	6,058	6,563	7,285	7,258	7,251	7,244
80–84	3,081	3,463	3,957	4,470	4,870	5,429	5,494	5,526
85 or older	2,410	2,861	3,286	3,837	4,322	4,627	4,780	4,951
Sex								
Men	10,268	11,282	12,416	13,434	14,112	14,837	15,095	15,395
Women	15,247	16,894	18,532	19,708	20,141	20,497	20,688	20,922
Race								
White	22,534	24,745	26,855	29,011	29,757	30,413	30,693	31,071
Black	--	--	--	--	2,721	2,868	2,932	2,994
All other races <sup>a</sup>	2,257	2,585	3,114	3,253	1,682	1,986	2,094	2,192
Native American	--	--	--	--	42	109	121	125
Asian/Pacific	--	--	--	--	494	608	648	686
Hispanic	--	--	--	--	710	746	768	789
Other	--	--	--	--	436	523	557	592
Unknown	724	846	979	878	92	67	64	60
<i>Hospital Insurance</i>								
Total	25,104	27,683	30,464	32,742	33,833	34,996	35,413	35,953
Age								
65–69	8,302	8,818	9,565	9,411	9,074	9,622	9,811	10,102
70–74	6,592	7,292	7,829	8,652	8,505	8,248	8,274	8,324
75–79	4,731	5,315	5,947	6,483	7,189	7,186	7,176	7,170
80–84	3,072	3,403	3,872	4,409	4,806	5,369	5,432	5,464
85 or older	2,407	2,854	3,252	3,787	4,259	4,572	4,721	4,891
Sex								
Men	10,156	11,146	12,280	13,310	13,979	14,727	14,975	15,277
Women	14,948	16,536	18,184	19,431	19,854	20,269	20,438	20,676
Race								
White	22,244	24,424	26,591	28,822	29,570	30,272	30,544	30,925
Black	--	--	--	--	2,668	2,830	2,886	2,949
All other races <sup>a</sup>	2,160	2,444	2,931	3,127	1,507	1,829	1,922	2,021
Native American	--	--	--	--	40	106	117	122
Asian/Pacific	--	--	--	--	406	526	559	595
Hispanic	--	--	--	--	656	700	716	736
Other	--	--	--	--	405	497	530	568
Unknown	699	815	942	792	87	65	60	57

## 8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B4—Hospital Insurance and/or Supplementary Medical Insurance: Number of enrollees aged 65 or older, by program, age, sex, and race, July 1, 1980–2006, selected years (in thousands)—Continued**

Age, sex, and race	1980	1985	1990	1995	2000	2004	2005	2006
	<i>Supplementary Medical Insurance</i>							
Total	24,680	27,311	29,686	31,742	32,590	33,440	33,784	34,183
Age								
65–69	8,156	8,607	9,008	8,830	8,330	8,724	8,852	9,039
70–74	6,570	7,277	7,740	8,430	8,256	7,929	7,949	7,986
75–79	4,684	5,333	5,942	6,431	7,088	7,053	7,042	7,025
80–84	2,981	3,381	3,879	4,392	4,782	5,306	5,367	5,394
85 or older	2,289	2,712	3,118	3,659	4,134	4,429	4,575	4,739
Sex								
Men	9,868	10,852	11,758	12,694	13,205	13,802	14,000	14,222
Women	14,813	16,459	17,927	19,048	19,384	19,639	19,784	19,961
Race								
White	21,876	24,060	25,849	27,899	28,432	28,914	29,113	29,387
Black	--	--	--	--	2,544	2,674	2,730	2,781
All other races <sup>a</sup>	2,114	2,441	2,910	3,028	1,542	1,806	1,898	1,976
Native American	--	--	--	--	39	99	110	114
Asian/Pacific	--	--	--	--	470	569	604	635
Hispanic	--	--	--	--	665	694	711	727
Other	--	--	--	--	368	444	473	500
Unknown	691	810	927	815	71	47	43	40

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 because of differences in sources and methodology.

-- = not available.

Totals do not necessarily equal the sum of rounded components.

a. Before 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 Native Americans. There were a number of efforts during the 1990s to populate these codes and identify persons coded as "Unknown." Consequently for 2000 and later, blacks are broken out separately from "All other races" and the detail for that category is shown.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B5—Hospital Insurance and/or Supplementary Medical Insurance: Number of enrollees under age 65 who are disabled or have end-stage renal disease, by program, age, sex, and race, July 1, 1980–2006, selected years**

Age, sex, and race	1980		1990		2000		2005		2006	
	All disabled	End-stage renal disease only	All disabled	End-stage renal disease only	All disabled	End-stage renal disease only	All disabled	End-stage renal disease only	All disabled	Disabled with ESRD and ESRD only
<b>Hospital Insurance and/or Supplementary Medical Insurance</b>										
Total	2,963,175	28,334	3,255,007	64,692	5,367,151	73,890	6,716,668	86,183	7,021,977	209,111
<b>Age</b>										
Under 35	371,204	8,773	483,265	16,603	522,321	13,255	599,983	13,870	614,778	23,604
35–44	369,460	5,188	654,957	14,159	1,129,288	15,084	1,180,904	15,975	1,183,326	36,532
45–54	657,486	6,977	741,200	15,800	1,627,238	22,647	2,094,100	26,473	2,192,065	64,386
55–64	1,565,025	7,396	1,375,585	18,130	2,088,304	22,904	2,841,681	29,865	3,031,808	84,589
<b>Sex</b>										
Men	1,870,558	14,547	2,042,944	33,647	3,014,107	40,062	3,606,531	47,513	3,745,171	121,747
Women	1,092,617	13,787	1,212,063	31,045	2,353,044	33,828	3,110,137	38,670	3,276,806	87,364
<b>Race</b>										
White	2,422,253	19,232	2,480,767	35,638	3,989,357	35,636	4,954,857	39,226	5,164,158	94,124
Black	--	--	--	--	1,007,147	27,404	1,264,570	31,309	1,326,485	83,653
All other races <sup>a</sup>	486,677	7,907	712,315	26,477	355,310	37,820	481,017	14,842	515,186	29,930
Native American	--	--	--	--	23,379	739	51,672	1,471	54,671	3,126
Asian/Pacific	--	--	--	--	41,384	2,143	66,754	3,175	73,290	6,129
Hispanic	--	--	--	--	200,808	4,087	241,690	6,382	257,192	13,767
Other	--	--	--	--	89,739	3,447	120,901	3,814	130,033	6,908
Unknown	54,245	1,195	61,925	2,577	15,337	434	16,224	806	16,148	1,404
<b>Hospital Insurance</b>										
Total	2,963,156	28,334	3,254,983	64,677	5,366,598	73,890	6,716,267	86,175	7,021,504	209,066
<b>Age</b>										
Under 35	371,199	8,773	483,262	16,601	522,123	13,255	599,916	13,868	614,715	23,591
35–44	369,458	5,188	654,953	14,157	1,129,170	15,084	1,180,806	15,974	1,183,238	36,519
45–54	657,483	6,977	741,193	15,794	1,627,107	22,647	2,094,001	26,470	2,191,964	64,376
55–64	1,565,016	7,396	1,375,575	18,125	2,088,198	22,904	2,841,544	29,863	3,031,587	84,580
<b>Sex</b>										
Men	1,870,543	14,547	2,042,929	33,639	3,013,803	40,062	3,606,296	47,510	3,744,908	121,724
Women	1,092,613	13,787	1,212,054	31,038	2,352,795	33,828	3,109,971	38,665	3,276,596	87,342
<b>Race</b>										
White	2,422,239	19,232	2,480,754	35,631	3,988,957	35,636	4,954,608	39,220	5,163,875	94,097
Black	--	--	--	--	1,007,035	27,404	1,264,461	31,308	1,326,356	83,642
All other races <sup>a</sup>	486,672	7,907	712,304	26,469	355,270	37,820	480,975	14,841	515,126	29,923
Native American	--	--	--	--	23,378	739	51,670	1,471	54,669	3,126
Asian/Pacific	--	--	--	--	41,379	2,143	66,745	3,175	73,273	6,128
Hispanic	--	--	--	--	200,793	4,087	241,674	6,382	257,168	13,764
Other	--	--	--	--	89,720	3,447	120,886	3,813	130,016	6,905
Unknown	54,245	1,195	61,925	2,577	15,336	434	16,223	806	16,147	1,404

## 8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B5—Hospital Insurance and/or Supplementary Medical Insurance: Number of enrollees under age 65 who are disabled or have end-stage renal disease, by program, age, sex, and race, July 1, 1980–2006, selected years—Continued**

Age, sex, and race	1980		1990		2000		2005		2006	
	All disabled	End-stage renal disease only	All disabled	End-stage renal disease only	All disabled	End-stage renal disease only	All disabled	End-stage renal disease only	All disabled	Disabled with ESRD and ESRD only
<b>Supplementary Medical Insurance</b>										
Total	2,719,226	27,046	2,943,480	58,912	4,769,804	68,800	5,945,978	78,887	6,214,752	193,323
Age										
Under 35	339,665	8,294	441,640	14,782	466,869	12,159	536,855	12,574	552,077	21,496
35–44	337,146	4,963	586,537	12,567	998,230	13,783	1,037,009	14,304	1,040,302	33,169
45–54	596,287	6,683	666,257	14,559	1,421,904	20,961	1,837,630	24,164	1,926,837	59,365
55–64	1,446,128	7,106	1,249,046	17,004	1,882,801	21,897	2,534,484	27,845	2,695,536	79,293
Sex										
Men	1,694,569	13,887	1,833,959	30,338	2,665,252	37,037	3,170,862	43,056	3,286,124	112,157
Women	1,024,657	13,159	1,109,521	28,574	2,104,552	31,763	2,775,116	35,831	2,928,628	81,166
Race										
White	2,218,176	18,458	2,236,781	32,347	3,535,008	33,154	4,372,131	35,932	4,556,193	86,302
Black	--	--	--	--	917,336	25,581	1,143,894	28,726	1,199,390	78,288
All other races <sup>a</sup>	449,753	7,446	650,121	24,240	304,500	35,256	416,223	13,528	445,642	27,520
Native American	--	--	--	--	20,994	688	46,449	1,337	48,989	2,913
Asian/Pacific	--	--	--	--	36,401	2,003	58,379	2,920	63,944	5,622
Hispanic	--	--	--	--	176,093	3,850	212,719	5,912	226,560	12,812
Other	--	--	--	--	71,012	3,134	98,676	3,359	106,149	6,173
Unknown	51,297	1,142	56,578	2,325	12,960	390	13,730	701	13,527	1,213

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 because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

-- = not available.

a. Before 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 Islanders, and Native Americans. There were a number of efforts during the 1990s to populate these codes and identify persons coded as "Unknown." Consequently for 2000 and later, blacks are broken out separately from "All other races" and the detail for that category is shown.

CONTACT: Maria Diacogiannis (410) 786-0178.



8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B8a—Hospital Insurance: Average covered charge per covered day of care in short-stay hospitals, by census division and state or other area, selected years 1975–2006 (in dollars)**

Census division and state or area <sup>a</sup>	1975	1980	1990	1995	2000	2004	2005	2006
Total								
All areas <sup>b</sup>	143	292	1,090	1,908	2,762	4,559	4,999	5,475
United States <sup>c</sup>	144	293	1,081	1,920	2,787	4,603	5,043	5,508
New England	159	298	988	1,763	2,436	3,512	3,766	4,066
Connecticut	167	287	1,177	2,013	2,608	3,746	4,063	4,460
Maine	133	284	927	1,645	2,328	3,306	3,515	3,709
Massachusetts	168	316	942	1,705	2,429	3,415	3,618	3,867
New Hampshire	123	264	1,022	1,699	2,480	3,676	4,069	4,388
Rhode Island	154	284	851	1,638	2,316	3,703	3,980	4,360
Vermont	124	230	923	1,580	1,995	2,889	3,087	3,374
Middle Atlantic	163	304	943	1,704	2,743	5,209	5,628	6,109
New Jersey	157	300	725	1,865	3,757	8,142	8,621	9,176
New York	176	301	836	1,366	2,116	3,752	4,123	4,501
Pennsylvania	145	312	1,236	2,109	3,003	5,287	5,806	6,413
East North Central	140	294	1,097	1,866	2,550	3,979	4,387	4,815
Illinois	148	322	1,202	2,126	3,017	4,566	4,980	5,493
Indiana	116	236	997	1,713	2,271	3,477	3,847	4,279
Michigan	156	332	1,193	1,881	2,451	3,715	4,089	4,424
Ohio	134	277	1,030	1,730	2,360	3,861	4,307	4,724
Wisconsin	128	251	933	1,690	2,424	3,984	4,426	4,852
West North Central	117	248	1,052	1,831	2,638	4,166	4,580	5,035
Iowa	110	239	902	1,573	2,124	3,391	3,847	4,268
Kansas	113	244	1,093	1,957	2,589	4,321	4,748	5,216
Minnesota	124	248	1,132	1,938	2,913	4,683	5,095	5,602
Missouri	119	257	1,108	1,922	2,783	4,107	4,514	4,948
Nebraska	116	251	1,043	1,850	3,007	4,968	5,279	5,821
North Dakota	118	237	937	1,509	2,180	3,318	3,549	3,837
South Dakota	107	228	915	1,518	2,167	3,762	4,255	4,697
South Atlantic	135	273	1,106	1,876	2,637	4,162	4,546	4,940
Delaware	153	274	1,191	1,831	1,971	2,954	3,336	3,647
District of Columbia	174	373	1,374	2,129	3,331	4,892	5,355	5,776
Florida	161	321	1,360	2,351	3,439	5,477	5,936	6,422
Georgia	125	258	1,081	1,744	2,527	3,947	4,357	4,785
Maryland	164	274	813	1,365	1,608	2,141	2,286	2,462
North Carolina	101	214	932	1,603	2,175	3,303	3,611	3,960
South Carolina	106	229	1,021	1,818	2,611	4,240	4,702	5,178
Virginia	118	247	1,022	1,732	2,432	3,862	4,237	4,623
West Virginia	108	247	1,009	1,472	1,821	2,641	2,886	3,085
East South Central	115	243	1,019	1,718	2,451	3,844	4,237	4,617
Alabama	126	282	1,176	2,054	2,914	4,609	5,068	5,409
Kentucky	107	216	967	1,630	2,269	3,497	3,866	4,189
Mississippi	98	213	865	1,437	2,017	3,278	3,654	4,030
Tennessee	122	250	1,012	1,662	2,479	3,798	4,184	4,630
West South Central	117	253	1,138	1,937	2,767	4,538	5,029	5,549
Arkansas	104	231	923	1,511	2,194	3,491	3,860	4,228
Louisiana	116	265	1,180	1,926	2,724	4,063	4,427	4,703
Oklahoma	128	271	997	1,620	2,335	3,696	4,145	4,610
Texas	118	250	1,212	2,118	3,008	5,049	5,600	6,200
Mountain	142	305	1,350	2,321	3,279	5,226	5,760	6,293
Arizona	155	325	1,442	2,617	3,885	5,800	6,304	6,916
Colorado	144	288	1,308	2,240	3,392	5,539	6,271	6,868
Idaho	129	273	1,140	1,951	2,471	3,700	4,108	4,402
Montana	116	262	1,036	1,742	2,233	3,491	3,757	4,119
Nevada	177	424	2,031	3,253	4,320	6,889	7,475	7,939
New Mexico	133	293	1,140	1,913	2,533	4,112	4,464	4,842
Utah	142	316	1,283	2,069	2,871	4,206	4,567	5,037
Wyoming	109	245	1,094	1,985	2,373	3,623	4,028	4,554

## 8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B8a—Hospital Insurance: Average covered charge per covered day of care in short-stay hospitals, by census division and state or other area, selected years 1975–2006 (in dollars)—Continued**

Census division and state or area <sup>a</sup>	1975	1980	1990	1995	2000	2004	2005	2006
Pacific	196	416	1,651	2,877	4,228	7,149	7,886	8,595
Alaska	228	379	1,470	2,385	3,144	4,951	5,438	5,855
California	206	448	1,794	3,156	4,701	7,976	8,803	9,586
Hawaii	148	333	1,224	2,319	2,991	4,170	4,582	4,639
Oregon	158	329	1,275	1,987	2,717	4,223	4,602	5,033
Washington	163	293	1,162	1,924	2,708	4,570	5,144	5,655
Outlying areas	77	152	510	739	947	1,084	1,138	1,225
Puerto Rico	77	151	505	736	946	1,074	1,124	1,197
Virgin Islands	92	161	746	843	1,007	1,618	1,922	2,058
Other <sup>d</sup>	88	263	...	...	...	...	...	1,421

SOURCE: Centers for Medicare & Medicaid.

NOTES: Data for 1975–1995 are based on bills approved in each year and recorded before June 1996. Data from 2000–2006 are based on the stay records for 100 percent of Medicare aged and disabled beneficiaries as recorded in the MEDPAR file.

... = not applicable.

- Geographic distribution for 1975, 1980, 1990, and 1995 reflects the beneficiaries' area of residence. Geographic distribution for 2000–2006 reflects the providers' state.
- Data for 1975, 1980, 1990, and 1995 exclude claims for persons residing in foreign countries.
- Data for 1975, 1980, 1990, and 1995 include claims for beneficiaries whose place of residence is unknown. For 2000–2005, utilization for residence of other areas were not separately identified and were grouped with "United States."
- Beginning in 2006, stays for providers in other territories were separately identified and grouped in the "other" category.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B8b—Hospital Insurance: Average covered charge per covered day of care in skilled nursing facilities, by census division and state or other area, selected years 1975–2005 (in dollars)**

Census division and state or area <sup>a</sup>	1975	1980	1990	1995	2000	2003	2004	2005
Total								
All areas <sup>b</sup>	43	70	193	402	462	487	493	504
United States <sup>c</sup>	43	70	193	402	462	487	493	504
New England	50	77	172	347	431	478	500	521
Connecticut	35	51	165	314	388	442	464	493
Maine	52	100	274	308	406	485	510	548
Massachusetts	63	98	181	380	484	518	536	554
New Hampshire	41	86	218	412	410	482	506	513
Rhode Island	43	59	129	265	392	428	439	456
Vermont	38	62	155	266	357	412	452	415
Middle Atlantic	50	73	168	308	428	489	499	511
New Jersey	45	81	164	344	434	531	546	563
New York	61	80	168	240	360	430	446	463
Pennsylvania	40	65	170	373	510	535	528	529
East North Central	40	68	167	358	450	481	481	493
Illinois	37	77	215	421	528	556	550	551
Indiana	35	60	180	399	447	448	446	463
Michigan	45	60	130	270	376	425	429	451
Ohio	41	69	157	375	462	485	484	496
Wisconsin	35	64	149	315	343	398	429	443
West North Central	45	82	194	367	473	507	506	515
Iowa	46	84	269	406	490	558	570	599
Kansas	39	66	255	461	539	511	497	506
Minnesota	46	94	125	245	306	407	427	466
Missouri	47	95	263	465	603	575	542	532
Nebraska	41	71	205	338	484	521	523	486
North Dakota	43	49	118	221	408	440	464	504
South Dakota	33	61	160	270	326	433	485	474
South Atlantic	34	59	168	396	405	420	431	446
Delaware	31	50	132	328	345	411	432	454
District of Columbia	34	64	193	389	437	504	513	521
Florida	34	59	195	488	447	432	447	466
Georgia	34	71	146	346	356	394	407	410
Maryland	37	56	141	347	403	428	428	445
North Carolina	31	52	132	283	342	380	397	408
South Carolina	26	46	159	337	384	404	404	428
Virginia	42	68	168	331	374	418	426	439
West Virginia	36	64	171	364	446	493	478	482
East South Central	37	56	154	358	420	433	445	448
Alabama	33	38	143	353	381	405	423	411
Kentucky	36	58	151	352	439	450	469	487
Mississippi	45	105	160	377	480	524	537	513
Tennessee	41	70	162	358	407	406	412	420
West South Central	45	94	267	539	579	537	533	526
Arkansas	44	84	238	372	499	574	570	558
Louisiana	43	83	374	683	754	674	648	588
Oklahoma	60	145	312	563	579	583	575	564
Texas	43	78	238	542	556	497	496	499
Mountain	38	64	226	486	477	456	462	477
Arizona	41	71	236	549	535	432	425	415
Colorado	42	73	266	538	502	471	478	500
Idaho	27	46	152	381	384	428	458	472
Montana	30	44	123	291	362	406	415	456
Nevada	37	66	232	569	592	425	428	429
New Mexico	57	122	267	488	534	552	549	528
Utah	36	75	266	473	435	483	494	542
Wyoming	36	49	208	379	421	475	473	515

(Continued)

## 8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B8b—Hospital Insurance: Average covered charge per covered day of care in skilled nursing facilities, by census division and state or other area, selected years 1975–2005 (in dollars)—Continued**

Census division and state or area <sup>a</sup>	1975	1980	1990	1995	2000	2003	2004	2005
Pacific	45	81	269	576	584	630	633	644
Alaska	68	115	283	437	0	660	735	718
California	46	87	287	629	0	698	702	713
Hawaii	49	83	217	467	469	550	580	602
Oregon	40	63	207	421	382	401	426	453
Washington	34	62	196	412	390	427	443	451
Outlying areas								
Puerto Rico	51	97	202	261	362	370	391	430
Virgin Islands	43	104	171	370	399	490	404	370

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Data for 1975 and 1980 are based on bills approved in each year and recorded in the Health Care Financing Administration before December 29, 1995. Data for 1990 and 1995 are based on bills incurred in each year and recorded in the agency before December 30, 1995. Data for 2000 through 2005 are based on skilled nursing facility stay records for claims processed and recorded in the agency's Medicare Provider Analysis and Review (MEDPAR) file through June 2006 for stays with dates of admission in the reference year and an indication of discharge by that update. Includes data for services rendered to both aged and disabled persons.

- a. Geographic distribution reflects the beneficiaries' area of residence.
- b. Excludes claims for persons residing in foreign countries.
- c. Includes claims for persons whose place of residence is unknown.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B8.1—Hospital Insurance: Short-stay hospital discharges, by state or other area, selected fiscal years 1990–2006**

State or area	1990	1995	1999	2000	2001	2002	2003	2004	2005	2006
All areas	10,472,587	11,680,874	11,659,885	11,778,705	12,192,174	12,499,749	12,698,388	12,986,560	12,980,067	12,492,501
Alabama	226,359	255,013	266,541	274,518	282,999	291,991	294,850	299,746	289,916	276,177
Alaska	6,491	8,635	11,031	11,684	11,748	11,794	11,398	11,554	11,506	11,862
Arizona	140,069	139,564	128,363	135,143	144,989	156,302	165,231	182,094	191,400	176,691
Arkansas	143,363	152,516	160,880	164,310	166,445	170,102	170,421	174,242	170,003	161,538
California	834,829	875,926	780,295	740,564	756,629	801,758	836,444	847,296	846,286	833,501
Colorado	98,262	105,216	100,648	101,486	101,258	107,180	109,879	114,051	116,310	113,626
Connecticut	114,938	141,765	125,115	124,951	135,169	148,864	154,460	159,594	164,766	163,911
Delaware	26,125	30,336	33,287	34,049	36,386	36,541	38,216	40,959	42,295	42,734
District of Columbia	36,062	39,526	38,693	39,112	40,138	39,389	39,151	40,527	40,881	39,767
Florida	579,368	742,862	736,958	765,130	823,957	869,777	899,404	925,090	921,995	896,030
Georgia	274,957	316,301	311,998	324,286	334,599	338,687	342,392	353,846	355,683	351,720
Hawaii	26,340	32,526	26,347	26,146	26,343	26,932	26,302	27,453	28,125	26,531
Idaho	31,559	36,327	43,353	44,027	43,272	40,996	40,738	39,756	37,580	36,170
Illinois	460,926	533,238	539,314	556,122	578,327	601,373	607,561	624,034	625,493	612,458
Indiana	254,404	276,601	289,693	297,851	306,202	304,034	303,404	310,393	312,461	300,895
Iowa	141,191	146,448	155,497	159,451	162,466	156,854	148,591	145,095	138,025	128,413
Kansas	117,017	120,593	126,920	128,024	129,973	129,334	131,412	130,138	128,439	121,592
Kentucky	199,042	222,162	237,553	243,886	252,454	257,205	255,264	258,938	260,340	248,702
Louisiana	213,819	234,663	223,794	237,154	243,724	248,183	253,774	254,224	244,437	216,209
Maine	54,963	63,013	68,128	69,030	68,547	66,705	67,401	67,914	65,640	62,303
Maryland	179,835	214,989	199,012	208,038	234,162	244,595	251,754	259,460	265,963	269,297
Massachusetts	286,332	310,455	268,179	263,152	271,657	275,984	291,062	300,460	303,171	304,618
Michigan	366,349	435,455	452,461	452,367	468,675	497,195	506,259	522,536	531,888	517,652
Minnesota	170,808	178,018	194,935	200,918	209,469	210,382	208,364	212,125	207,340	188,055
Mississippi	142,662	162,934	181,575	183,952	185,626	182,535	183,965	185,131	182,237	171,334
Missouri	281,059	298,509	293,724	300,576	315,642	317,278	320,454	331,919	335,644	318,253
Montana	40,505	40,770	42,343	44,208	45,697	42,880	40,952	41,719	40,734	37,799
Nebraska	69,299	70,113	76,841	76,960	74,217	71,921	71,577	72,718	75,456	71,717
Nevada	37,478	49,254	48,369	49,613	51,836	56,622	57,345	62,742	65,749	67,049
New Hampshire	39,103	42,746	42,054	45,712	48,206	46,282	46,304	46,893	44,246	43,848
New Jersey	338,509	385,145	373,224	372,063	374,250	389,938	404,035	410,302	415,558	408,774
New Mexico	50,391	50,334	51,459	51,085	51,396	51,469	51,533	52,083	53,247	51,922
New York	723,060	797,453	777,269	750,793	761,352	771,835	780,893	793,919	827,445	801,593
North Carolina	267,370	336,173	395,004	406,700	413,429	418,725	431,441	439,157	437,330	420,790
North Dakota	37,543	37,014	38,847	39,672	38,764	34,707	34,645	34,712	34,214	32,349
Ohio	527,006	562,234	533,499	536,335	550,989	559,223	565,314	588,640	596,857	582,853
Oklahoma	155,100	156,239	170,592	176,021	179,543	182,998	187,913	193,773	190,727	186,979
Oregon	106,164	105,878	100,569	91,806	98,854	102,568	102,182	99,869	92,710	85,095
Pennsylvania	685,403	766,535	664,002	634,802	649,458	656,105	654,661	665,143	666,969	609,706
Rhode Island	46,578	49,740	39,625	38,489	39,658	40,229	38,506	39,556	40,098	40,098
South Carolina	112,232	156,060	194,344	204,038	213,513	216,412	218,775	221,825	223,044	216,080
South Dakota	38,175	41,714	44,846	45,239	45,202	43,134	42,626	40,946	39,276	36,052
Tennessee	290,371	310,335	318,793	327,423	341,212	344,524	348,700	357,600	355,948	347,221
Texas	603,621	671,734	725,166	742,628	798,667	843,945	868,784	897,873	883,811	866,549
Utah	39,963	43,819	48,898	53,003	55,207	56,244	57,928	61,309	60,885	57,025
Vermont	20,251	22,815	23,133	24,014	24,778	22,658	22,690	22,174	20,866	18,715
Virginia	240,165	271,620	289,195	295,790	305,346	310,602	315,181	324,379	323,414	313,069
Washington	157,942	157,146	148,620	153,660	162,197	166,846	167,102	171,361	175,107	175,580
West Virginia	111,305	124,293	134,483	134,585	135,458	132,356	131,953	134,992	128,795	120,039
Wisconsin	217,727	227,774	233,432	238,572	240,711	243,774	244,100	243,116	230,655	217,354
Wyoming	15,255	16,009	17,429	18,764	18,932	18,044	16,416	16,097	15,958	15,335
Outlying areas										
Puerto Rico	93,436	111,950	130,209	137,315	138,713	139,682	134,979	131,223	118,565	74,985
Virgin Islands	528	1,374	1,511	1,552	1,468	1,571	1,641	1,743	1,785	1,768
Unknown/other <sup>a</sup>	978	1,012	1,835	1,936	2,265	2,485	2,061	2,121	2,794	2,118

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Data for 2000 through 2006 are based on short-stay inpatient hospital stay records for claims processed and recorded in the agency's Medicare Provider Analysis and Review (MEDPAR) file through June 2007.

a. Represents unknown and other areas not listed separately.

CONTACT: Maria Diacogiannis (410) 786-0178.

## 8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B9—Supplementary Medical Insurance: Number of reimbursed bills, charges, and amount reimbursed, by type of beneficiary and type of service, for claims incurred 1997–2005 (in thousands)**

Year <sup>a</sup>	All services	Physicians' services			Outpatient hospital services	Independent laboratory services	Home health services <sup>b</sup>	All other services
		Total	Surgical <sup>c</sup>	Medical <sup>c</sup>				
<b>Persons aged 65 or older</b>								
<i>Number of bills</i>								
1997	600,228	418,826	46,517	372,309	52,364	49,917	245	78,876
1998	611,356	427,891	46,273	381,618	52,807	42,715	4,632	83,311
1999	<sup>d</sup> 486,296	429,299	45,496	383,803	51,498	<sup>d</sup>	5,499	<sup>d</sup>
2000	--	--	--	--	--	--	--	--
2001	--	--	--	--	--	--	--	--
2002	--	--	--	--	--	--	--	--
2003	--	--	--	--	--	--	--	--
2004	--	--	--	--	--	--	--	--
2005	--	--	--	--	--	--	--	--
<i>Allowed charges <sup>e</sup> (dollars)</i>								
1997	92,897,397	40,447,640	12,953,314	27,493,847	37,669,213	1,490,474	336,443	12,953,627
1998	101,840,926	41,704,109	12,061,669	29,634,502	38,746,856	1,333,198	6,051,859	14,004,904
1999	105,664,413	43,771,964	12,080,067	31,637,737	40,243,635	1,264,426	6,874,113	13,510,275
2000	114,463,963	48,335,051	12,358,986	35,902,761	44,217,919	1,583,630	5,558,701	14,768,662
2001	131,329,657	55,171,872	13,091,543	40,923,161	52,867,374	1,860,323	4,197,515	17,232,573
2002	152,936,873	58,773,592	--	--	67,490,131	2,101,103	4,362,532	20,209,515
2003	175,715,306	64,647,019	--	--	81,020,493	2,293,330	4,803,648	22,950,816
2004	201,358,895	71,328,961	--	--	97,328,115	2,551,093	5,378,244	24,772,482
2005	224,315,314	73,640,361	--	--	115,941,793	2,750,594	6,076,649	25,905,917
<i>Amount reimbursed <sup>f</sup> (dollars)</i>								
1997	52,437,116	31,683,721	10,218,613	21,464,753	11,208,190	1,440,441	235,099	7,869,665
1998	56,706,261	32,668,167	9,517,777	23,144,124	10,686,605	1,278,720	4,261,952	7,810,817
1999	58,242,119	34,424,846	9,523,625	24,857,734	10,365,512	1,209,285	4,836,246	7,406,230
2000	62,317,913	37,964,491	9,743,222	28,166,179	10,677,318	1,503,061	4,180,363	7,992,680
2001	71,345,982	43,354,009	10,351,499	32,120,569	12,947,907	1,760,106	4,061,628	9,222,332
2002	77,660,520	46,201,607	--	--	14,749,186	1,982,842	4,313,458	10,413,427
2003	85,868,864	50,850,701	--	--	16,694,728	2,163,223	4,579,139	11,581,073
2004	95,545,640	56,135,544	--	--	19,383,619	2,404,412	5,287,512	12,334,553
2005	101,714,387	57,968,543	--	--	21,781,457	2,590,805	6,049,620	13,323,962
<b>Disabled beneficiaries</b>								
<i>Number of bills</i>								
1997	86,071	55,260	4,773	50,487	12,415	8,073	0	10,323
1998	89,890	58,244	4,991	53,253	12,639	6,776	475	11,756
1999	<sup>d</sup> 72,288	59,281	5,042	54,239	12,413	<sup>d</sup>	594	<sup>d</sup>
2000	--	--	--	--	--	--	--	--
2001	--	--	--	--	--	--	--	--
2002	--	--	--	--	--	--	--	--
2003	--	--	--	--	--	--	--	--
2004	--	--	--	--	--	--	--	--
2005	--	--	--	--	--	--	--	--
<i>Allowed charges <sup>e</sup> (dollars)</i>								
1997	17,062,714	5,399,416	1,409,583	3,989,586	9,395,017	281,459	575	1,986,247
1998	18,746,687	5,828,284	1,401,045	4,421,251	9,551,832	252,458	721,884	2,392,229
1999	20,046,826	6,298,890	1,453,807	4,812,231	10,130,120	245,525	867,209	2,505,082
2000	22,097,171	7,140,407	1,526,798	5,582,913	11,122,256	294,758	730,750	2,809,000
2001	25,872,075	8,339,487	1,631,945	6,383,077	13,310,513	343,196	561,099	3,317,780
2002	32,797,113	9,233,277	--	--	18,557,925	402,193	607,024	3,996,694
2003	41,421,583	10,768,708	--	--	24,805,775	457,506	692,869	4,696,725
2004	52,621,219	12,705,530	--	--	33,424,812	531,285	804,738	5,154,854
2005	64,764,825	13,503,399	--	--	43,944,675	582,907	948,497	5,785,347

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B9—Supplementary Medical Insurance: Number of reimbursed bills, charges, and amount reimbursed, by type of beneficiary and type of service, for claims incurred 1997–2005 (in thousands)—Continued**

Year <sup>a</sup>	All services	Physicians' services			Outpatient hospital services	Independent laboratory services	Home health services <sup>b</sup>	All other services
		Total	Surgical <sup>c</sup>	Medical <sup>c</sup>				
<i>Amount reimbursed <sup>f</sup> (dollars)</i>								
1997	9,592,858	4,093,669	1,103,074	2,990,428	3,839,784	276,057	454	1,382,894
1998	10,446,294	4,409,966	1,095,140	3,310,214	3,778,150	246,338	497,581	1,514,259
1999	11,002,708	4,782,133	1,135,375	3,621,070	3,841,626	239,194	594,950	1,544,805
2000	11,938,053	5,418,901	1,192,908	4,203,799	4,007,106	286,675	529,591	1,695,780
2001	13,851,513	6,333,057	1,278,008	4,823,352	4,728,326	333,191	489,650	1,967,289
2002	15,685,143	7,023,892	--	--	5,430,328	390,035	540,938	2,299,950
2003	18,075,888	8,215,711	--	--	6,164,920	443,179	600,605	2,651,473
2004	20,954,731	9,719,744	--	--	7,175,429	514,470	720,820	2,824,268
2005	23,007,049	10,347,063	--	--	7,950,866	565,175	864,646	3,279,299

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Data are subject to revision.

-- = not available.

- a. Period for which the claim incurred.
- b. Because of provisions in the Balanced Budget Act, beginning in 1998, Part A now has a 100-visit limit, and additional home health services will be billed under Part B.
- c. Where both medical and surgical charges are included on a single bill, the highest-priced service is the determining factor in classifying the bill.
- d. Total for "All services" excludes "Independent laboratory services" and "All other services"; for those services, data are not available because of programmatic problems.
- e. Includes physician or supplier allowed charges as determined by the carrier and amounts actually billed by providers for outpatient hospital and home health services.
- f. Amount reimbursed to or on behalf of the beneficiary—generally 80 percent of the allowed charges, once the beneficiary has satisfied the deductible in the current year. Some radiology and pathology services are reimbursed at a 100 percent rate, regardless of the beneficiary's deductible status.

CONTACT: Maria Diacogiannis (410) 786-0178.

## 8.B Medicare: Enrollment, Utilization, and Reimbursement

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**Table 8.B10—Supplementary Medical Insurance:  
Claims received by carriers and assignment rates,  
1969–2006**

Year	Total number of claims (thousands)	Net assignment rate <sup>a</sup> (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

SOURCE: Centers for Medicare & Medicaid Services.

a. Represents the number of assigned claims as a percentage of claims received.

CONTACT: Maria Diacogiannis (410) 786-0178.



8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B11—Supplementary Medical Insurance: Reasonable charge determination for claims assigned and unassigned for aged and disabled persons, 1971–2006**

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 <sup>a</sup>	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
<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 <sup>a</sup>	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)

## 8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B11—Supplementary Medical Insurance: Reasonable charge determination for claims assigned and unassigned for aged and disabled persons, 1971–2006—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

SOURCE: Centers for Medicare & Medicaid Services.

a. Excludes Texas Blue-Shield plan from July to December 1981.

CONTACT: Maria Diacogiannis (410) 786-0178.

**Table 8.B12—Supplementary Medical Insurance: State buy-ins, by state or other area, selected years 1991–2007**

State or area	1991	1995	1999	2000	2002	2003	2004	2005	2006	2007
All areas	3,640,121	4,705,625	5,273,573	5,425,048	5,810,613	6,145,589	6,305,467	6,577,577	6,885,326	7,082,006
Alabama	97,601	116,916	128,875	136,860	144,603	162,912	164,499	169,460	175,134	179,542
Alaska	4,539	6,193	7,799	8,486	9,324	10,008	10,318	10,748	11,465	11,904
Arizona	28,650	44,236	53,450	57,712	74,678	91,782	95,804	110,977	116,065	121,455
Arkansas	64,996	77,660	79,508	79,606	82,040	86,597	86,181	89,372	96,906	99,214
California	646,108	747,814	793,510	818,846	892,260	950,503	977,676	1,012,804	1,047,842	1,078,076
Colorado	36,470	46,660	53,964	55,325	57,987	59,114	61,140	61,294	64,505	68,264
Connecticut	23,535	48,047	52,134	53,141	60,083	65,223	66,664	66,191	66,968	67,876
Delaware	4,499	6,645	8,231	10,737	13,252	15,224	16,081	17,104	19,534	19,821
District of Columbia	12,791	14,152	13,181	14,233	15,065	15,079	15,586	15,246	15,365	15,584
Florida	196,992	271,430	324,172	342,109	369,092	389,599	406,006	431,764	459,146	470,337
Georgia	128,976	160,380	171,638	176,596	186,466	193,807	199,524	205,476	212,257	217,562
Hawaii	11,529	16,695	19,962	20,326	21,748	22,904	22,988	23,703	26,040	25,862
Idaho	9,127	12,931	15,868	17,081	19,725	21,255	22,291	23,482	24,628	26,030
Illinois	94,434	137,571	149,850	155,743	163,368	175,822	189,044	206,014	215,631	222,728
Indiana	60,297	76,460	82,901	87,543	95,553	102,654	105,011	109,669	114,933	120,079
Iowa	41,170	48,517	50,954	51,976	54,536	56,920	58,023	60,458	63,221	66,022
Kansas	26,960	34,708	40,365	41,217	43,123	44,602	46,175	47,707	49,483	50,732
Kentucky	76,456	97,978	111,789	117,697	122,096	126,690	126,343	126,468	134,469	137,602
Louisiana	87,570	112,090	116,602	117,179	120,478	127,340	132,498	139,802	140,291	141,009
Maine	22,176	29,453	35,211	36,946	39,575	42,269	43,800	46,510	52,560	64,164
Maryland	48,028	58,865	64,086	65,372	70,224	73,994	75,366	79,234	83,078	85,824
Massachusetts	89,163	125,859	143,779	152,587	164,510	167,681	170,689	178,691	188,576	191,171
Michigan	91,340	123,948	139,411	145,172	152,758	158,998	161,519	170,044	180,235	185,626
Minnesota	39,366	52,192	59,926	63,607	70,873	75,080	77,499	79,428	81,353	83,420
Mississippi	90,530	108,577	107,176	107,495	125,832	131,706	133,337	135,023	137,715	136,096
Missouri	55,116	72,659	85,329	88,343	93,512	99,127	103,449	109,561	110,734	113,722
Montana	10,058	11,031	12,274	12,828	13,359	13,889	13,917	14,455	15,097	15,456
Nebraska	11,358	16,146	19,064	20,520	22,120	22,922	23,082	24,210	25,243	25,640
Nevada	8,657	14,227	18,322	19,155	22,207	24,587	26,977	27,408	28,639	30,319
New Hampshire	3,807	5,405	6,875	7,434	9,231	10,120	10,732	11,584	12,597	13,454
New Jersey	95,795	122,923	143,024	146,705	151,644	155,377	153,231	159,110	169,804	170,280
New Mexico	22,246	29,855	36,023	37,330	41,263	44,534	44,642	49,333	52,078	53,757
New York	255,952	325,882	372,824	369,479	409,388	432,681	448,373	465,068	487,736	500,099
North Carolina	117,656	186,328	216,563	223,402	233,229	240,422	241,543	251,739	258,981	261,690
North Dakota	4,639	5,560	5,758	5,908	6,317	6,541	6,560	6,757	7,185	7,610
Ohio	112,598	164,044	181,407	171,139	182,821	191,295	195,792	204,905	223,726	234,958
Oklahoma	51,457	60,080	66,115	67,413	68,905	70,761	72,758	75,903	80,536	82,671
Oregon	28,537	43,642	55,896	59,169	66,255	68,421	69,610	70,927	72,394	75,113
Pennsylvania	127,519	162,788	198,492	206,468	218,691	229,814	232,885	242,552	258,675	268,833
Rhode Island	10,585	15,517	18,513	19,787	22,928	25,146	25,361	26,311	27,002	27,508
South Carolina	78,701	95,970	110,032	112,232	118,635	117,997	118,393	118,843	121,469	124,502
South Dakota	9,399	12,346	13,112	13,146	13,542	14,231	14,045	14,534	15,176	15,407
Tennessee	116,861	148,391	178,707	182,342	187,438	203,567	208,678	218,894	228,849	232,611
Texas	234,169	314,991	350,959	360,191	380,954	410,248	423,560	440,938	457,346	473,962
Utah	10,263	13,506	15,569	16,231	17,497	18,548	19,361	21,787	24,114	24,775
Vermont	8,223	12,428	13,598	13,754	14,650	15,016	15,079	15,509	20,857	21,831
Virginia	77,898	102,964	111,404	113,259	116,496	120,711	124,996	131,083	137,991	141,569
Washington	54,774	71,531	91,976	97,390	99,552	105,516	108,780	113,233	119,180	123,471
West Virginia	28,086	39,720	45,406	46,305	47,547	50,008	51,365	54,200	57,688	59,576
Wisconsin	67,516	75,247	74,681	74,101	75,179	78,124	79,889	83,383	85,661	87,901
Wyoming	3,505	5,265	6,183	6,444	7,087	7,422	7,454	7,749	8,015	8,135
Outlying areas										
Guam	443	669	583	417	339	339	375	409	647	633
Northern Mariana Islands	273	314	335	342	372	358	340	358	354	373
Virgin Islands	727	219	207	204	206	194	178	165	152	150

SOURCE: Centers for Medicare &amp; Medicaid Services.

NOTE: Data are as of July except for 1995 data, which are as of June.

CONTACT: Maria Diacogiannis (410) 786-0178.

## 8.C Medicare: Participating Facilities

**Table 8.C1—Hospital Insurance and/or Supplementary Medical Insurance: Number of facilities and beds, by type of participating provider, December 1967–2006, selected years**

Year	Hospitals			Skilled nursing facilities	Home health agencies	Clinical Laboratory Improvement Act/ independent laboratories <sup>a</sup>
	All hospitals	General <sup>b</sup>	Psychiatric			
<b>Facilities</b>						
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
<b>Beds</b>						
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)

**Table 8.C1—Hospital Insurance and/or Supplementary Medical Insurance: Number of facilities and beds, by type of participating provider, December 1967–2006, selected years—Continued**

Year	Hospitals			Skilled nursing facilities	Home health agencies	Clinical Laboratory Improvement Act/independent laboratories <sup>a</sup>
	All hospitals	General <sup>b</sup>	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	...	...

SOURCE: Centers for Medicare &amp; 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.

CONTACT: Maria Diacogiannis (410) 786-0178.

## 8.C Medicare: Participating Facilities

**Table 8.C2—Number of participating Medicare hospitals and certified beds, by type of hospital, region, division, and state; United States and outlying areas, December 2006**

Census division and state or area	All hospitals		Short-stay and critical access hospitals <sup>a</sup>			Other non-short-stay <sup>b</sup>	
	Hospitals	Beds	Hospitals	Beds	Beds per 1,000 enrollees <sup>c</sup>	Hospitals	Beds
Total							
All areas	6,177	938,762	4,986	831,679	19.4	1,191	107,083
United States	6,113	927,336	4,928	821,403	19.3	1,185	105,933
New England	263	43,257	193	32,772	14.8	70	10,485
Connecticut	44	10,228	32	8,299	15.7	12	1,929
Maine	45	4,194	40	3,697	15.4	5	497
Massachusetts	114	19,844	70	13,159	13.4	44	6,685
New Hampshire	30	3,526	26	3,055	15.5	4	471
Rhode Island	15	3,657	11	2,903	17.0	4	754
Vermont	15	1,808	14	1,659	16.8	1	149
Middle Atlantic	587	136,674	452	117,906	19.2	135	18,768
New Jersey	109	30,191	76	25,928	21.2	33	4,263
New York	242	70,276	206	62,692	22.7	36	7,584
Pennsylvania	236	36,207	170	29,286	13.6	66	6,921
East North Central	915	155,468	741	141,081	21.0	174	14,387
Illinois	213	45,084	185	41,666	24.6	28	3,418
Indiana	159	18,941	116	16,641	18.1	43	2,300
Michigan	180	28,941	145	26,337	17.5	35	2,604
Ohio	219	44,520	171	40,386	22.9	48	4,134
Wisconsin	144	17,982	124	16,051	19.1	20	1,931
West North Central	787	75,553	712	69,534	22.9	75	6,019
Iowa	128	11,738	124	11,388	23.1	4	350
Kansas	159	11,364	145	10,351	25.5	14	1,013
Minnesota	147	15,730	134	14,396	20.2	13	1,334
Missouri	141	23,576	114	21,506	23.2	27	2,070
Nebraska	96	6,470	87	5,810	22.0	9	660
North Dakota	50	3,297	45	2,958	28.5	5	339
South Dakota	66	3,378	63	3,125	24.6	3	253
South Atlantic	897	172,014	716	153,736	18.3	181	18,278
Delaware	10	2,261	5	1,892	14.4	5	369
District of Columbia	14	4,332	7	3,553	49.8	7	779
Florida	238	56,759	189	51,956	16.9	49	4,803
Georgia	178	24,888	145	21,960	20.6	33	2,928
Maryland	64	15,815	47	13,085	18.6	17	2,730
North Carolina	134	25,448	117	22,563	17.1	17	2,885
South Carolina	78	12,580	59	11,168	16.7	19	1,412
Virginia	113	20,681	90	19,092	18.9	23	1,589
West Virginia	68	9,250	57	8,467	23.5	11	783
East South Central	518	74,592	431	68,253	23.9	87	6,339
Alabama	129	19,725	104	17,891	23.3	25	1,834
Kentucky	120	17,281	97	15,126	22.0	23	2,155
Mississippi	115	13,032	103	12,410	27.0	12	622
Tennessee	154	24,554	127	22,826	24.1	27	1,728
West South Central	1,032	113,619	732	95,951	22.4	300	17,668
Arkansas	104	10,512	79	8,592	17.7	25	1,920
Louisiana	239	21,828	134	17,213	27.7	105	4,615
Oklahoma	153	14,837	126	13,480	24.4	27	1,357
Texas	536	66,442	393	56,666	21.7	143	9,776
Mountain	481	50,194	400	44,621	17.3	81	5,573
Arizona	103	14,497	81	13,178	16.3	22	1,319
Colorado	90	12,089	72	10,471	19.7	18	1,618
Idaho	49	3,288	42	2,949	14.8	7	339
Montana	64	3,011	62	2,817	18.6	2	194
Nevada	46	5,782	34	5,019	16.4	12	763
New Mexico	52	4,932	42	4,455	16.4	10	477
Utah	48	5,121	41	4,343	17.8	7	778
Wyoming	29	1,474	26	1,389	19.2	3	85

(Continued)

**Table 8.C2—Number of participating Medicare hospitals and certified beds, by type of hospital, region, division, and state; United States and outlying areas, December 2006—Continued**

Census division and state or area	All hospitals		Short-stay and critical access hospitals <sup>a</sup>			Other non-short-stay <sup>b</sup>	
	Hospitals	Beds	Hospitals	Beds	Beds per 1,000 enrollees <sup>c</sup>	Hospitals	Beds
Pacific	633	105,965	551	97,549	16.9	82	8,416
Alaska	24	1,506	22	1,337	24.7	2	169
California	421	80,715	359	74,955	18.1	62	5,760
Hawaii	28	2,748	23	2,318	12.6	5	430
Oregon	59	7,433	57	7,152	13.1	2	281
Washington	101	13,563	90	11,787	14.0	11	1,776
Outlying areas	64	11,426	58	10,276	10.5	6	1,150
Puerto Rico	59	10,741	53	9,591	15.7	6	1,150
Virgin Islands	2	320	2	320	24.3	0	0
Other	3	365	3	365	1.0	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, 2006.

CONTACT: Maria Diacogiannis (410) 786-0178.

## 8.C Medicare: Participating Facilities

**Table 8.C3—Hospital Insurance and/or 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 2006**

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 <sup>a</sup>			
Total						
All areas	15,028	1,507,368	35.1	8,618	199,817	4,892
United States	15,018	1,506,955	35.9	8,563	198,659	4,848
New England	1,003	103,020	46.5	303	9,355	161
Connecticut	245	29,653	56.3	83	2,602	30
Maine	113	6,699	28.0	29	952	18
Massachusetts	443	47,619	48.6	121	3,675	80
New Hampshire	74	7,164	36.3	36	922	10
Rhode Island	87	8,580	50.1	22	753	17
Vermont	41	3,305	33.5	12	451	6
Middle Atlantic	1,719	253,723	41.3	550	23,333	591
New Jersey	361	49,949	40.9	50	5,395	117
New York	653	120,566	43.6	187	10,322	237
Pennsylvania	705	83,208	38.7	313	7,616	237
East North Central	2,901	272,737	40.6	1,490	32,417	751
Illinois	699	61,197	36.2	426	8,438	192
Indiana	492	44,456	48.2	175	4,840	101
Michigan	396	42,253	28.0	315	6,797	147
Ohio	944	89,549	50.8	446	9,136	205
Wisconsin	370	35,282	42.0	128	3,206	106
West North Central	1,913	149,698	49.4	830	15,245	371
Iowa	414	28,916	58.6	181	2,649	61
Kansas	264	18,408	45.4	135	2,288	44
Minnesota	386	33,924	47.6	214	2,766	79
Missouri	482	42,573	46.0	167	4,649	116
Nebraska	192	13,501	51.2	66	1,588	33
North Dakota	83	6,502	62.5	26	531	14
South Dakota	92	5,874	46.3	41	774	24
South Atlantic	2,291	237,733	28.3	1,407	41,091	1,086
Delaware	38	3,949	30.1	16	735	17
District of Columbia	19	2,121	29.7	23	427	23
Florida	679	77,135	25.1	742	14,175	289
Georgia	355	37,789	35.5	99	6,562	233
Maryland	226	24,210	34.3	50	3,405	110
North Carolina	421	41,200	31.3	168	6,181	153
South Carolina	175	16,733	25.0	69	3,340	99
Virginia	257	25,121	24.8	178	4,535	135
West Virginia	121	9,475	26.3	62	1,731	27
East South Central	990	89,981	31.5	446	13,359	380
Alabama	228	24,768	32.3	145	3,432	108
Kentucky	293	24,169	35.1	104	3,215	76
Mississippi	169	15,121	32.9	56	2,148	69
Tennessee	300	25,923	27.4	141	4,564	127
West South Central	1,852	190,362	44.5	2,237	26,441	681
Arkansas	210	20,167	41.6	174	1,913	62
Louisiana	292	36,303	58.4	221	3,758	144
Oklahoma	279	25,349	45.9	203	3,033	69
Texas	1,071	108,543	41.5	1,639	17,737	406
Mountain	731	66,633	25.8	530	11,931	269
Arizona	135	14,621	18.1	82	3,559	100
Colorado	193	17,499	32.9	142	2,639	51
Idaho	77	5,863	29.4	48	868	14
Montana	96	7,129	47.1	37	678	13
Nevada	45	5,124	16.8	63	1,276	24
New Mexico	67	6,269	23.1	68	1,218	34
Utah	85	7,305	30.0	63	1,324	24
Wyoming	33	2,823	39.0	27	369	9

(Continued)



**Table 8.C3—Hospital Insurance and/or 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 2006—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 <sup>a</sup>			
Pacific	1,618	143,068	24.8	770	25,487	558
Alaska	15	483	8.9	16	503	4
California	1,206	108,733	26.3	619	18,863	429
Hawaii	42	3,584	19.4	14	808	17
Oregon	121	9,987	18.2	61	2,200	49
Washington	234	20,281	24.1	60	3,113	59
Outlying areas	10	413	0.6	55	1,158	44
Puerto Rico	8	343	0.6	48	1,032	36
Virgin Islands	1	40	3.0	2	39	3
Other	1	30	0.1	5	87	5

SOURCE: Centers for Medicare &amp; Medicaid Services.

a. Based on total number of beneficiaries enrolled in the Hospital Insurance program as of July 1, 2006.

CONTACT: Maria Diacogiannis (410) 786-0178.

## 8.E Medicaid: Recipients

**Table 8.E1—Number of recipients, total vendor payments, and average payment, by type of medical service, fiscal years 1985–2005**

Year	Total <sup>a</sup>	Inpatient services in—		Intermediate-care facility services for—		Nursing facility <sup>b</sup>	Physicians <sup>c</sup>	Dental	Other practitioner	Out-patient hospital	Clinic	Laboratory and radiological	Home health	Pre-scribed drugs	Family planning	Other <sup>c</sup>
		General hospital	Mental hospital	Mentally retarded	All other											
<i>Number of recipients (thousands)</i>																
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	<sup>b</sup>	1,500	19,321	5,209	4,282	14,137	3,511	10,505	813	19,602	2,185	10,319
1992	30,926	5,768	77	151	<sup>b</sup>	1,573	21,627	5,700	4,711	15,120	4,115	11,804	925	22,030	2,550	12,427
1993	33,432	5,894	75	149	<sup>b</sup>	1,610	23,746	6,174	5,229	16,436	4,839	12,970	1,067	23,901	2,538	15,035
1994	35,053	5,866	85	159	<sup>b</sup>	1,639	24,267	6,352	5,409	16,567	5,258	13,412	1,293	24,471	2,566	17,321
1995	36,282	5,561	84	151	<sup>b</sup>	1,667	23,789	6,383	5,528	16,712	5,322	13,064	1,639	23,723	2,501	19,277
1996	36,118	5,362	93	140	<sup>b</sup>	1,594	22,861	6,208	5,343	15,905	5,070	12,607	1,727	22,585	2,366	21,104
1997	34,873	4,746	87	136	<sup>b</sup>	1,603	21,170	5,935	5,142	13,632	4,713	11,074	1,861	20,954	2,091	20,284
1998	40,649	4,273	135	126	<sup>b</sup>	1,646	18,555	4,965	4,342	12,158	5,285	9,381	1,225	19,338	2,011	34,820
1999 <sup>d</sup>	40,300	4,479	96	121	<sup>b</sup>	1,624	18,052	5,577	3,945	12,323	6,660	10,103	808	19,428	...	37,484
2000 <sup>d</sup>	42,886	4,912	99	118	<sup>b</sup>	1,705	18,965	5,922	4,758	13,169	7,677	11,438	1,007	20,324	...	40,732
2001 <sup>d</sup>	46,163	4,879	91	116	<sup>b</sup>	1,702	20,021	7,018	5,102	13,731	8,463	12,339	1,013	21,910	...	44,608
2002 <sup>d,e</sup>	49,329	5,046	100	117	<sup>b</sup>	1,760	22,065	7,881	5,566	14,831	9,491	14,062	1,064	24,380	...	49,556
2003 <sup>d</sup>	51,971	5,217	105	114	<sup>b</sup>	1,691	22,857	8,510	5,746	15,511	10,162	14,687	1,184	26,075	...	53,128
2004 <sup>d</sup>	55,002	5,425	117	114	<sup>b</sup>	1,709	23,612	9,037	5,933	15,888	11,102	15,875	1,146	27,549	...	69,340
2005 <sup>d,f</sup>	57,643	5,488	120	109	<sup>b</sup>	1,712	24,204	9,328	5,904	16,314	11,913	16,020	1,195	28,385	...	74,296
<i>Total payments (millions of dollars)</i>																
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	<sup>b</sup>	20,709	4,952	710	437	4,283	2,211	897	4,101	5,424	359	3,384
1992	90,814	23,503	2,196	8,550	<sup>b</sup>	23,544	6,102	851	538	5,279	2,818	1,035	4,886	6,765	500	4,243
1993	101,709	25,734	2,161	8,831	<sup>b</sup>	25,431	6,952	961	937	6,215	3,457	1,137	5,601	7,970	538	5,784
1994	108,270	26,180	2,057	8,347	<sup>b</sup>	27,095	7,189	969	1,040	6,342	3,747	1,176	7,042	8,875	516	7,695
1995	120,141	26,331	2,511	10,383	<sup>b</sup>	29,052	7,360	1,019	986	6,627	4,280	1,180	9,406	9,791	514	10,700
1996	121,685	25,176	2,040	9,555	<sup>b</sup>	29,630	7,238	1,028	1,094	6,504	4,222	1,208	10,868	10,697	474	11,948
1997	124,429	23,143	2,009	9,798	<sup>b</sup>	30,504	7,041	1,036	979	6,169	4,252	1,033	12,237	11,972	418	12,958
1998	142,318	21,499	2,801	9,482	<sup>b</sup>	31,892	6,070	901	587	5,759	3,921	939	2,702	13,522	449	38,747
1999 <sup>d</sup>	147,372	21,341	1,638	8,756	<sup>b</sup>	31,976	6,420	1,155	464	5,895	5,439	1,143	2,714	15,933	...	44,492
2000 <sup>d</sup>	168,442	24,130	1,769	9,375	<sup>b</sup>	34,527	6,809	1,413	663	7,081	6,137	1,292	3,133	19,898	...	52,209
2001 <sup>d</sup>	186,913	25,943	1,959	9,700	<sup>b</sup>	37,322	7,438	1,896	761	7,496	5,602	1,622	3,520	23,764	...	59,884
2002 <sup>d,e</sup>	213,497	29,123	2,128	10,676	<sup>b</sup>	39,286	8,349	2,309	842	8,469	6,704	2,160	3,926	28,404	...	71,121
2003 <sup>d</sup>	233,206	31,549	2,143	10,861	<sup>b</sup>	40,381	9,210	2,595	882	9,252	7,312	2,365	4,404	33,714	...	78,537
2004 <sup>d</sup>	257,748	34,914	2,326	11,193	<sup>b</sup>	42,008	10,061	2,867	951	10,261	8,336	2,695	4,566	39,476	...	88,096
2005 <sup>d,f</sup>	275,569	35,347	2,333	11,730	<sup>b</sup>	44,675	11,278	3,045	1,182	10,228	8,986	2,927	5,361	42,830	...	95,649

(Continued)

**Table 8.E1—Number of recipients, total vendor payments, and average payment, by type of medical service, fiscal years 1985–2005—Continued**

Year	Total <sup>a</sup>	Inpatient services in—		Intermediate-care facility services for—		Nursing facility <sup>b</sup>	Physicians'	Dental	Other practitioner	Out-patient hospital	Clinic	Laboratory and radiological	Home health	Pre-scribed drugs	Family planning	Other <sup>c</sup>
		General hospital	Mental hospital	Mentally retarded	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	<sup>b</sup>	13,811	256	136	102	303	630	85	5,048	277	164	328
1992	2,936	4,075	28,364	56,502	<sup>b</sup>	14,965	282	149	114	349	685	88	5,283	307	196	342
1993	3,042	4,366	28,948	59,156	<sup>b</sup>	15,798	293	156	179	378	714	88	5,250	333	212	385
1994	3,089	4,463	24,120	52,571	<sup>b</sup>	16,533	296	153	192	383	713	88	5,445	363	201	444
1995	3,311	4,735	29,847	68,613	<sup>b</sup>	17,424	309	160	178	397	804	90	5,740	413	206	555
1996	3,369	4,696	21,873	68,232	<sup>b</sup>	18,589	317	166	205	409	833	96	6,293	474	200	566
1997	3,568	4,877	22,990	72,033	<sup>b</sup>	19,029	333	275	190	453	902	93	6,575	571	200	639
1998	3,501	5,031	20,701	74,960	<sup>b</sup>	19,379	327	182	135	474	742	100	2,206	699	223	1,113
1999 <sup>d</sup>	3,657	4,764	16,913	72,180	<sup>b</sup>	19,688	356	207	118	478	817	113	3,356	820	...	1,187
2000 <sup>d</sup>	3,928	4,912	17,780	78,882	<sup>b</sup>	20,240	359	239	139	538	799	113	3,111	979	...	1,282
2001 <sup>d</sup>	4,049	5,317	21,482	83,191	<sup>b</sup>	21,926	372	270	149	546	662	132	3,473	1,085	...	1,342
2002 <sup>d,e</sup>	4,328	5,771	21,377	91,588	<sup>b</sup>	22,326	378	293	151	571	706	154	3,689	1,165	...	1,435
2003 <sup>d</sup>	4,487	6,047	20,503	95,287	<sup>b</sup>	23,882	403	305	154	596	720	161	3,720	1,293	...	1,478
2004 <sup>d</sup>	4,686	6,435	19,928	98,281	<sup>b</sup>	24,585	426	317	160	646	751	170	3,984	1,433	...	1,270
2005 <sup>d,f</sup>	4,781	6,441	19,397	107,205	<sup>b</sup>	26,097	466	326	200	627	754	183	4,487	1,509	...	1,287

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.

NOTE: ... = not applicable.

- Number of recipients (thousands) by type of medical services does not add to the total because a number of recipients receive medical services in more than one category during the year. Total represents the unduplicated number of recipients receiving any type of medical service during the year.
- 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."
- Beginning in 1998, several new medical services were combined with "Other" (excludes unknowns).
- Excludes recipients in Puerto Rico and the Virgin Islands. Data are not available.
- Revised data.
- Fiscal year 2005 data are not available for Maine. Fiscal year 2004 data has been substituted.

CONTACT: Janet Freeze (410) 786-5917.

## 8.E Medicaid: Recipients

**Table 8.E2—Unduplicated number of recipients, total vendor payments, and average payment, by type of eligibility category, fiscal years 1985–2005**

Year	Total	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 <sup>a</sup>	40,300	4,241	...	7,303	20,119	8,552	846
2000 <sup>a</sup>	42,886	4,289	...	7,479	21,086	10,543	862
2001 <sup>a</sup>	46,163	4,420	...	7,703	22,533	11,639	869
2002 <sup>a,b</sup>	49,329	3,890	...	7,411	22,421	11,253	4,354
2003 <sup>a</sup>	51,971	4,041	...	7,669	23,992	11,679	4,591
2004 <sup>a</sup>	55,002	4,318	...	7,933	25,613	12,225	4,913
2005 <sup>a,c</sup>	57,643	4,396	...	8,210	26,337	12,529	6,171
<i>Total 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 <sup>a</sup>	147,372	40,470	...	63,028	20,765	15,141	7,966
2000 <sup>a</sup>	168,442	44,560	...	72,772	23,490	17,671	9,948
2001 <sup>a</sup>	186,913	48,431	...	80,493	26,770	20,096	11,121
2002 <sup>a,b</sup>	213,497	52,012	...	92,414	31,595	23,525	13,950
2003 <sup>a</sup>	233,206	55,271	...	102,014	35,079	26,689	14,153
2004 <sup>a</sup>	257,748	59,541	...	111,614	39,194	30,522	16,877
2005 <sup>a,c</sup>	275,569	63,358	...	119,647	42,012	32,385	18,167

(Continued)

**Table 8.E2—Unduplicated number of recipients, total vendor payments, and average payment, by type of eligibility category, fiscal years 1985–2005—Continued**

Year	Total	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 <sup>a</sup>	3,657	9,541	...	8,630	1,032	1,770	9,407
2000 <sup>a</sup>	3,928	10,388	...	9,729	1,114	1,676	11,536
2001 <sup>a</sup>	4,049	10,957	...	10,449	1,188	1,727	12,792
2002 <sup>a,b</sup>	4,328	13,370	...	12,470	1,409	2,091	3,204
2003 <sup>a</sup>	4,487	13,677	...	13,303	1,462	2,285	3,083
2004 <sup>a</sup>	4,686	13,790	...	14,070	1,530	2,497	3,435
2005 <sup>a,c</sup>	4,781	14,413	...	14,574	1,595	2,585	2,944

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: Totals do not necessarily equal the sum of rounded components.

Beginning in 1997, "Disability" data 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.

... = not applicable.

- a. Excludes recipients in Puerto Rico and the Virgin Islands. Data are not available.
- b. Revised data.
- c. Fiscal year 2005 data are not available for Maine. Fiscal year 2004 data has been substituted.

CONTACT: Janet Freeze (410) 786-5917.

## 8.H Medicaid: State Data

**Table 8.H1—Number of recipients, total payments, and average payment, by state, fiscal year 2004**

State	Number of recipients	Total payments (millions of dollars)	Average payment (dollars)
United States <sup>a</sup>	55,002,107	257,748	4,686
Alabama	808,192	3,857	4,772
Alaska	118,005	905	7,665
Arizona	1,070,317	3,888	3,633
Arkansas	707,792	2,358	3,332
California	10,014,373	27,444	2,740
Colorado	503,485	2,399	4,765
Connecticut	500,952	3,696	7,377
Delaware	157,306	800	5,086
District of Columbia	157,650	1,269	8,052
Florida	2,952,363	12,834	4,347
Georgia	1,928,820	6,944	3,600
Hawaii	218,397	862	3,946
Idaho	206,462	990	4,796
Illinois	2,031,777	10,796	5,314
Indiana	946,212	4,343	4,589
Iowa	382,887	2,206	5,760
Kansas	365,078	1,860	5,095
Kentucky	860,508	3,924	4,560
Louisiana	1,108,054	4,039	3,645
Maine	293,966	2,366	8,050
Maryland	750,287	4,594	6,123
Massachusetts	1,074,050	7,776	7,240
Michigan	1,799,058	7,697	4,278
Minnesota	697,929	4,575	6,555
Mississippi	725,637	3,312	4,564
Missouri	1,140,194	4,887	4,286
Montana	112,642	585	5,191
Nebraska	244,275	1,346	5,509
Nevada	237,015	806	3,399
New Hampshire	119,207	822	6,898
New Jersey	959,843	6,623	6,900
New Mexico	474,303	2,278	4,802
New York	4,712,211	37,273	7,910
North Carolina	1,512,608	7,388	4,884
North Dakota	78,324	477	6,096
Ohio	1,896,173	11,375	5,999
Oklahoma	653,777	2,335	3,572
Oregon	559,004	2,153	3,851
Pennsylvania	1,834,651	10,055	5,481
Rhode Island	207,621	1,531	7,374
South Carolina	856,715	4,015	4,686
South Dakota	127,783	580	4,537
Tennessee	1,654,656	6,971	4,213
Texas	3,603,539	13,214	3,667
Utah	307,059	1,356	4,416
Vermont	148,921	744	4,998
Virginia	732,009	3,574	4,883
Washington	1,109,110	4,930	4,445
West Virginia	376,680	2,020	5,361
Wisconsin	896,468	4,314	4,812
Wyoming	67,762	363	5,362

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.

NOTE: Totals do not necessarily equal the sum of rounded components.

a. Excludes recipients in Puerto Rico and the Virgin Islands. Data are not available.

CONTACT: Janet Freeze (410) 786-5917.

Table 8.H1—Number of recipients, total payments, and average payment, by state, fiscal year 2005

State	Number of recipients	Total payments (millions of dollars)	Average payment (dollars)
United States <sup>a</sup>	57,642,988	275,569	4,781
Alabama	125,168	1,004	8,019
Alaska	838,787	4,154	4,953
Arizona	977,121	2,662	2,725
Arkansas	1,202,991	4,449	3,699
California	10,509,214	28,638	2,725
Colorado	593,039	2,595	4,375
Connecticut	520,660	3,787	7,273
Delaware	157,714	1,316	8,343
District of Columbia	165,354	885	5,350
Florida	3,166,071	13,154	4,155
Georgia	2,038,468	6,821	3,346
Hawaii	223,933	931	4,157
Idaho	400,141	2,350	5,874
Illinois	200,571	1,072	5,346
Indiana	2,239,134	10,788	4,818
Iowa	984,302	4,780	4,857
Kansas	384,890	2,080	5,405
Kentucky	856,566	4,044	4,721
Louisiana	1,146,062	4,420	3,857
Maine <sup>b</sup>	293,966	2,366	8,050
Maryland	750,131	4,949	6,597
Massachusetts	293,966	2,366	8,050
Michigan	1,856,006	7,654	4,124
Minnesota	707,643	5,234	7,396
Mississippi	1,156,308	5,263	4,552
Missouri	715,940	3,470	4,847
Montana	116,315	621	5,339
Nebraska	1,548,843	8,415	5,433
Nevada	73,548	557	7,576
New Hampshire	247,688	1,450	5,853
New Jersey	120,760	818	6,773
New Mexico	965,768	7,010	7,258
New York	491,310	2,415	4,916
North Carolina	256,812	1,090	4,243
North Dakota	4,937,673	39,348	7,969
Ohio	1,954,950	12,114	6,197
Oklahoma	685,524	2,561	3,736
Oregon	547,462	2,444	4,465
Pennsylvania	1,990,466	11,902	5,979
Rhode Island	209,371	1,638	7,822
South Carolina	869,910	4,248	4,883
South Dakota	130,864	627	4,792
Tennessee	1,609,782	7,698	4,782
Texas	3,752,644	14,365	3,828
Utah	314,136	1,501	4,777
Vermont	778,407	4,061	5,217
Virginia	150,836	859	5,696
Washington	1,177,988	5,335	4,529
West Virginia	948,734	4,580	4,827
Wisconsin	373,568	2,339	6,262
Wyoming	68,974	398	5,769

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.

NOTE: Totals do not necessarily equal the sum of rounded components.

- a. Excludes recipients in Puerto Rico and the Virgin Islands. Data are not available.  
b. Fiscal year 2005 data are not available for Maine. Fiscal year 2004 data has been substituted.

CONTACT: Janet Freeze (410) 786-5917.





## **Section 9. Other Social Insurance Programs, Veterans' Benefits, and Public Assistance**

### **Other Social Insurance and Veterans' Benefits**

Unemployment Insurance	9.1
Workers' Compensation	9.3
Temporary Disability Insurance	9.9
Black Lung Benefits	9.10
Veterans' Benefits	9.13

### **Public Assistance**

The sections on Temporary Assistance for Needy Families, Food Stamps, and the Low-Income Home Energy Programs have been discontinued.



Table 9.A2—Summary data on state programs, by state or other area, 2006

State or area	Covered employment (excludes federal government)		Insured unemploy- ment as percent of covered employ- ment <sup>a</sup>	Number of first payments	Average weekly benefit for total unemployment		Average weekly insured unemploy- ment	Average actual duration (weeks)	Claimants exhausting benefits		Contrib- utions collected <sup>b</sup> (millions of dollars)	Benefits paid <sup>c</sup> (millions of dollars)	Average employer contri- bution rate <sup>d</sup> (percent)
	Average number of workers (thou- sands)	Total payroll <sup>e</sup> (millions of dollars)			Amount <sup>f</sup> (dollars)	Percent of average weekly wages <sup>g</sup>			Number	Percent of first pay- ments <sup>h</sup>			
Total	132,173	5,546,605	1.9	7,350,734	277.20	34.3	2,475,634	15.2	2,676,729	35.3	34,092	29,807	2.7
Alabama	1,877	66,553	1.4	104,538	183.76	27.0	26,726	11.3	27,112	25.9	245	206	1.6
Alaska	291	11,829	4.0	40,859	197.63	25.3	11,649	14.4	16,072	37.6	156	110	3.0
Arizona	2,563	101,575	1.0	68,354	197.64	25.9	25,007	14.6	26,246	39.8	295	209	1.5
Arkansas	1,147	36,638	2.4	80,412	243.98	39.7	27,899	13.7	28,685	37.4	260	243	2.5
California	15,259	734,391	2.2	947,507	289.07	31.2	340,772	16.6	400,860	43.0	4,871	4,485	4.4
Colorado	2,190	94,268	1.1	69,203	312.33	37.7	23,184	13.5	30,003	43.0	478	288	2.1
Connecticut	1,653	90,578	2.4	119,169	304.37	28.9	38,961	16.5	39,211	32.9	525	559	2.6
Delaware	417	19,258	1.9	22,545	251.08	28.3	7,822	17.2	7,009	30.7	78	97	2.4
District of Columbia	478	31,049	0.9	16,185	282.70	22.6	4,270	19.3	8,839	55.0	107	93	2.1
Florida	7,823	298,346	1.0	239,827	231.38	31.5	82,009	14.4	101,780	43.6	1,127	719	1.9
Georgia	3,931	156,719	1.3	197,792	255.57	33.3	52,529	11.0	74,547	38.2	621	537	1.9
Hawaii	586	21,520	1.1	21,320	365.09	51.7	6,223	13.1	4,423	21.4	143	97	1.3
Idaho	631	20,262	1.7	39,749	241.02	39.0	10,970	11.6	10,439	26.3	135	101	1.5
Illinois	5,734	260,369	2.2	334,744	291.67	33.4	124,030	17.3	121,579	36.2	2,511	1,649	4.4
Indiana	2,856	103,634	1.9	186,602	286.32	41.0	53,669	12.8	70,455	39.2	569	731	2.9
Iowa	1,452	49,519	1.7	92,610	281.97	43.0	24,139	12.5	21,901	24.4	292	310	1.6
Kansas	1,302	46,011	1.3	54,376	286.83	42.2	17,352	14.4	18,921	34.1	329	210	2.3
Kentucky	1,741	60,646	1.7	111,461	270.56	40.4	30,438	13.1	23,312	22.3	351	382	2.7
Louisiana	1,775	64,234	1.5	59,614	191.12	27.5	26,149	27.1	95,223	33.0	207	294	1.5
Maine	584	19,379	1.7	30,916	245.65	38.5	9,939	14.1	9,175	30.3	99	106	1.8
Maryland	2,405	107,099	1.4	95,915	273.68	32.0	33,677	14.8	29,671	31.5	458	391	2.2
Massachusetts	3,145	164,204	2.5	210,418	366.33	36.5	78,908	17.7	72,815	34.7	1,595	1,255	3.8
Michigan	4,182	175,476	3.6	475,596	293.66	36.4	148,683	14.5	159,310	35.3	1,516	1,960	4.6
Minnesota	2,637	110,715	1.7	141,039	333.47	41.3	46,126	15.3	42,928	30.6	882	663	1.8
Mississippi	1,096	33,542	2.0	53,135	185.84	31.6	22,147	16.9	27,641	27.4	132	161	1.7
Missouri	2,646	97,322	1.7	134,756	212.28	30.0	46,122	14.2	41,725	31.9	546	411	2.2
Montana	413	12,308	1.7	20,422	203.74	35.5	7,054	14.7	6,318	31.6	79	63	1.2
Nebraska	886	29,632	1.2	33,424	230.86	35.9	10,417	12.9	15,010	42.5	154	93	2.5
Nevada	1,255	49,942	1.5	63,614	274.02	35.8	18,756	13.3	18,727	31.8	353	246	1.4
New Hampshire	619	26,136	1.1	24,988	255.58	31.5	6,826	11.7	3,780	15.9	62	78	1.5
New Jersey	3,892	200,132	2.8	305,259	344.09	34.8	108,539	17.8	134,554	44.4	1,518	1,775	1.6
New Mexico	777	26,102	1.3	27,170	237.70	36.8	10,362	15.8	9,405	35.7	100	105	1.0
New York	8,298	459,527	2.1	454,201	277.41	26.0	177,823	17.9	177,109	37.7	2,397	2,279	4.0
North Carolina	3,900	144,962	1.9	238,656	265.08	37.1	74,989	13.7	96,747	40.5	933	720	2.0
North Dakota	326	10,047	1.1	13,627	254.84	43.0	3,447	11.0	4,247	34.4	56	42	1.3

(Continued)

## 9.A Unemployment Insurance

**Table 9.A2—Summary data on state programs, by state or other area, 2006—Continued**

State or area	Covered employment (excludes federal government)		Insured unemploy- ment as percent of covered employ- ment <sup>a</sup>	Number of first payments	Average weekly benefit for total unemployment		Average weekly insured unemploy- ment	Average actual duration (weeks)	Claimants exhausting benefits		Contri- butions collected <sup>b</sup> (millions of dollars)	Benefits paid <sup>c</sup> (millions of dollars)	Average employer contri- bution rate <sup>d</sup> (percent)
	Average number of workers (thou- sands)	Total payroll <sup>e</sup> (millions of dollars)			Amount <sup>f</sup> (dollars)	Percent of average weekly wages <sup>g</sup>			Number	Percent of first pay- ments <sup>h</sup>			
Ohio	5,238	200,267	1.9	275,431	287.03	39.0	98,244	15.0	79,243	28.6	1,068	1,096	2.6
Oklahoma	1,461	48,657	1.0	41,089	233.23	36.4	14,463	15.1	16,211	39.4	251	140	1.4
Oregon	1,671	62,987	2.4	125,609	269.63	37.2	40,875	14.3	38,641	31.0	684	470	2.3
Pennsylvania	5,502	225,554	3.0	447,066	301.27	38.2	163,399	16.4	133,827	30.0	2,301	2,030	5.4
Rhode Island	471	18,770	2.6	37,588	341.76	44.6	12,034	15.2	13,867	36.9	191	196	3.3
South Carolina	1,827	62,002	2.0	112,134	222.80	34.1	37,027	13.4	40,776	37.1	278	326	2.2
South Dakota	373	11,067	0.6	7,872	218.51	38.3	2,220	11.4	963	11.8	19	22	0.8
Tennessee	2,684	99,423	1.5	142,704	215.70	30.3	40,282	13.6	49,842	34.7	363	408	1.9
Texas	9,740	410,229	1.1	297,478	271.04	33.5	104,963	14.2	115,584	35.5	1,563	1,070	2.3
Utah	1,135	39,181	0.7	22,878	274.22	41.3	8,158	14.8	8,687	31.8	240	92	1.3
Vermont	297	10,429	2.2	22,143	275.27	40.8	6,472	14.4	4,115	18.7	49	84	2.5
Virginia	3,482	149,184	0.9	106,554	255.67	31.0	30,625	12.5	35,743	34.2	517	347	1.8
Washington	2,781	118,184	1.9	171,137	322.13	39.4	51,985	13.8	38,575	22.4	1,342	710	2.4
West Virginia	683	21,769	1.9	40,319	230.52	37.6	12,920	14.2	9,957	25.2	138	132	2.8
Wisconsin	2,737	100,330	2.6	258,845	258.79	36.7	71,407	13.2	64,761	25.5	684	786	2.9
Wyoming	260	9,393	0.9	9,545	253.42	36.4	2,289	12.1	2,760	25.7	52	30	1.7
Outlying areas													
Puerto Rico	1,020	23,722	3.9	100,947	109.76	24.5	40,230	18.4	46,920	45.4	174	199	3.2
Virgin Islands	44	1,533	1.0	1,392	269.94	40.4	428	14.7	478	35.5	1	5	0.3

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.

Table 9.B1—Coverage, benefits, and costs, selected years 1940–2005

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 <sup>a</sup>	Benefits as a percentage of covered payroll <sup>b</sup>
		Total	Type of insurance			Type of benefits			
			Private carriers <sup>c</sup>	State and federal funds <sup>d</sup>	Employers' self-insurance <sup>b</sup>	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	109.6	44,586	22,306	10,753	11,527	17,194	27,392	2.05	1.51
1995	112.4	43,373	21,145	10,996	11,232	16,733	26,640	1.82	1.38
1996	114.8	41,837	20,392	10,669	10,775	16,567	25,269	1.66	1.26
1997	118.1	42,314	21,645	10,046	10,623	17,306	25,008	1.49	1.18
1998	121.5	43,278	22,966	10,109	10,203	18,121	25,157	1.38	1.11
1999	124.3	45,581	25,726	9,745	10,109	19,059	26,521	1.33	1.10

(Continued)

## 9.B Workers' Compensation

**Table 9.B1—Coverage, benefits, and costs, selected years 1940–2005—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 <sup>a</sup>	Benefits as a percentage of covered payroll <sup>b</sup>
		Total	Type of insurance			Type of benefits			
			Private carriers <sup>c</sup>	State and federal funds <sup>d</sup>	Employers' self-insurance <sup>b</sup>	Medical and hospitalization	Compensation payments		
2000	127.1	47,695	26,866	10,379	10,449	20,927	26,767	1.30	1.06
2001	127.0	50,533	27,970	11,060	11,503	22,844	27,689	1.40	1.10
2002	125.6	53,309	28,783	12,480	12,046	24,480	28,829	1.60	1.16
2003	125.2	54,715	28,547	13,642	12,525	25,510	29,205	1.73	1.16
2004	125.9	55,968	28,346	14,300	13,321	26,099	29,869	1.76	1.13
2005	128.1	55,307	28,107	14,014	13,186	26,219	29,088	1.7	1.06

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.

NOTE: Beginning in 1959, includes Alaska and Hawaii. States periodically update prior-year data, and any such changes are included in the current table.

- 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.

Table 9.B2—Benefits, by state and federal program, 2001–2005 (in thousands of dollars)

Program	2001	2002	2003	2004	2005
Total, state and federal	50,826,955	52,415,940	55,066,439	56,074,292	55,307,176
<i>State programs</i>					
Subtotal	47,757,688	49,262,314	51,881,754	52,818,090	52,049,021
Alabama	562,773	565,264	580,184	575,697	608,522
Alaska	158,520	178,789	182,204	187,080	189,212
Arizona	452,011	477,568	515,231	548,172	535,539
Arkansas	223,416	217,346	224,275	227,243	208,021
California	10,082,580	10,974,355	12,409,808	12,459,589	10,938,475
Colorado	566,354	760,958	753,049	843,256	896,430
Connecticut	641,341	675,895	677,088	711,237	713,275
Delaware	126,270	137,264	156,494	157,398	168,146
District of Columbia	99,496	89,315	84,015	96,141	91,270
Florida	3,033,955	2,623,239	2,805,941	2,710,272	2,899,301
Georgia	1,006,721	917,266	981,142	1,114,154	1,197,521
Hawaii	248,100	267,827	274,922	271,290	250,779
Idaho	199,044	202,181	213,604	236,149	243,168
Illinois	2,122,283	2,148,757	2,146,926	2,246,186	2,404,456
Indiana	556,866	547,305	563,577	595,245	609,596
Iowa	391,156	401,983	427,030	447,343	473,724
Kansas	339,258	341,606	295,520	371,011	383,283
Kentucky	725,056	692,398	717,309	719,833	705,802
Louisiana	633,703	621,449	669,218	726,004	667,097
Maine	245,343	260,310	233,458	268,040	268,936
Maryland	681,633	664,282	723,475	786,631	769,563
Massachusetts	901,729	887,313	1,058,838	968,085	903,555
Michigan	1,477,986	1,512,457	1,476,850	1,517,386	1,473,598
Minnesota	901,780	921,473	885,006	931,005	945,888
Mississippi	284,729	290,378	291,151	310,030	311,796
Missouri	958,708	1,033,458	1,080,870	1,119,871	1,050,889
Montana	181,770	196,197	216,715	223,048	239,498
Nebraska	235,434	266,304	267,372	282,636	298,366
Nevada	310,750	315,886	329,333	358,732	394,373
New Hampshire	217,879	212,571	221,050	212,060	216,968
New Jersey	1,312,381	1,382,123	1,659,898	1,478,882	1,608,345
New Mexico	158,815	175,551	188,959	196,123	230,591
New York	2,881,566	2,976,380	3,143,350	3,278,654	2,895,331
North Carolina	916,541	993,658	1,077,322	1,159,566	1,398,001
North Dakota	70,984	73,517	78,453	83,237	82,282
Ohio	2,248,369	2,388,186	2,442,187	2,434,715	2,447,038
Oklahoma	526,070	508,931	555,127	579,795	587,523
Oregon	503,895	504,085	497,612	533,831	550,878
Pennsylvania	2,406,272	2,478,709	2,565,344	2,594,238	2,677,899
Rhode Island	137,518	143,894	134,072	147,674	142,170
South Carolina	532,374	592,530	656,935	688,115	769,553
South Dakota	70,736	73,478	74,241	77,409	85,889
Tennessee	860,144	721,733	783,400	818,627	880,100
Texas	2,298,129	2,370,797	1,967,609	1,640,765	1,554,796
Utah	199,567	212,537	187,182	216,599	240,767
Vermont	98,518	119,329	120,009	123,823	122,160
Virginia	612,083	630,107	706,110	753,409	853,877
Washington	1,639,435	1,716,435	1,800,849	1,836,174	1,864,015
West Virginia	686,808	791,762	823,300	796,680	695,771
Wisconsin	930,762	899,700	843,888	1,038,893	1,188,459
Wyoming	100,076	107,475	114,252	120,062	116,528

(Continued)

## 9.B Workers' Compensation

**Table 9.B2—Benefits, by state and federal program, 2001–2005 (in thousands of dollars)—Continued**

Program	2001	2002	2003	2004	2005
<i>Federal programs<sup>a</sup></i>					
Subtotal	3,069,267	3,153,626	3,184,685	3,256,202	3,258,155
Civilian employee	2,223,088	2,317,325	2,367,757	2,445,077	2,462,059
Other	846,179	836,301	816,928	811,125	796,096

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.

NOTE: States periodically update prior-year data, and any such changes are included in the current table.

- 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.



**Table 9.B3—Benefits paid by type of insurer and medical benefits paid, by state and federal program, 2005  
(in thousands of dollars)**

Program	Benefits paid by type of insurer				Medical benefits paid	
	Total	Private carriers <sup>a</sup>	State funds	Self-insurance <sup>b</sup>	Total	As a percentage of total benefits
Total, state and federal	55,307,176	28,106,848	10,756,148	13,186,026	26,219,035	47.4
<b>State programs</b>						
Subtotal	52,049,021	28,106,848	10,756,148	13,186,026	25,383,827	48.8
Alabama	608,522	300,234	...	308,288	401,621	<sup>c</sup> 66.0
Alaska	189,212	144,134	...	45,079	108,563	<sup>c</sup> 57.4
Arizona	535,539	131,050	306,361	98,128	348,066	<sup>c</sup> 65.0
Arkansas	208,021	137,816	...	70,205	135,089	<sup>c</sup> 64.9
California	10,938,475	5,120,508	2,681,112	3,136,855	5,102,013	46.6
Colorado	896,430	266,509	421,565	208,356	437,694	<sup>c</sup> 48.8
Connecticut	713,275	531,495	...	181,780	297,522	<sup>c</sup> 41.7
Delaware	168,146	127,535	...	40,611	76,338	<sup>d</sup> 45.4
District of Columbia	91,270	73,478	...	17,793	31,543	<sup>c</sup> 34.6
Florida	2,899,301	2,207,274	...	692,027	1,805,804	<sup>c</sup> 62.3
Georgia	1,197,521	856,289	...	341,232	605,829	<sup>c</sup> 50.6
Hawaii	250,779	134,670	34,782	81,327	98,665	<sup>c</sup> 39.3
Idaho	243,168	72,178	131,205	39,785	145,542	<sup>c</sup> 59.9
Illinois	2,404,456	1,798,774	...	605,682	1,189,744	<sup>c</sup> 49.5
Indiana	609,596	510,345	...	99,251	417,296	<sup>c</sup> 68.5
Iowa	473,724	363,855	...	109,869	241,213	<sup>c</sup> 50.9
Kansas	383,283	256,004	...	127,279	218,966	<sup>c</sup> 57.1
Kentucky	705,802	369,501	78,212	258,089	388,668	<sup>c</sup> 55.1
Louisiana	667,097	274,638	153,499	238,961	340,180	<sup>c</sup> 51.0
Maine	268,936	95,714	89,175	84,047	107,090	<sup>c</sup> 39.8
Maryland	769,563	425,022	215,186	129,355	308,432	<sup>c</sup> 40.1
Massachusetts	903,555	754,809	...	148,746	328,979	36.4
Michigan	1,473,598	858,953	...	614,645	510,063	34.6
Minnesota	945,888	584,403	123,310	238,176	477,628	50.5
Mississippi	311,796	172,712	...	139,084	171,807	<sup>c</sup> 55.1
Missouri	1,050,889	648,435	101,563	300,891	543,822	<sup>c</sup> 51.7
Montana	239,498	76,130	119,915	43,453	132,568	<sup>c</sup> 55.4
Nebraska	298,366	236,254	...	62,111	178,518	<sup>c</sup> 59.8
Nevada	394,373	272,027	...	122,346	272,487	<sup>c</sup> 46.3
New Hampshire	216,968	170,825	...	46,143	128,862	<sup>c</sup> 59.4
New Jersey	1,608,345	1,230,686	...	377,659	797,692	<sup>d</sup> 49.6
New Mexico	230,591	116,557	28,979	85,055	134,028	<sup>c</sup> 58.1
New York	2,895,331	1,458,234	757,238	679,859	1,004,575	34.7
North Carolina	1,398,001	1,015,863	...	382,138	624,901	<sup>c</sup> 44.7
North Dakota	82,282	...	82,282	...	45,085	54.8
Ohio	2,447,038	37,693	1,961,918	447,428	1,144,090	46.8
Oklahoma	587,523	235,863	228,782	122,878	275,621	<sup>c</sup> 46.9
Oregon	550,878	217,850	260,832	72,196	300,806	<sup>c</sup> 54.6
Pennsylvania	2,677,899	1,819,582	271,457	586,860	1,147,532	42.9
Rhode Island	142,170	31,133	93,544	17,494	48,276	<sup>c</sup> 34.0
South Carolina	769,553	524,368	56,579	188,606	353,033	<sup>c</sup> 45.9
South Dakota	85,889	70,270	...	15,619	56,924	<sup>c</sup> 66.3
Tennessee	880,100	682,109	...	197,991	477,153	<sup>c</sup> 54.2
Texas	1,554,796	899,363	344,482	310,951	965,280	<sup>c</sup> 62.1
Utah	240,767	71,400	123,279	46,089	167,161	<sup>c</sup> 69.4
Vermont	122,160	106,166	...	15,994	58,982	<sup>c</sup> 48.3
Virginia	853,877	631,073	...	222,804	482,507	<sup>c</sup> 56.5
Washington	1,864,015	...	1,375,657	488,358	662,936	35.6
West Virginia	695,771	5,966	598,708	91,097	339,319	<sup>d</sup> 48.8
Wisconsin	1,188,459	981,099	...	207,360	780,485	<sup>d</sup> 65.7
Wyoming	116,528	...	116,528	...	56,829	<sup>d</sup> 48.8

(Continued)

## 9.B Workers' Compensation

**Table 9.B3—Benefits paid by type of insurer and medical benefits paid, by state and federal program, 2005  
(in thousands of dollars)—Continued**

Program	Benefits paid by type of insurer				Medical benefits paid	
	Total	Private carriers <sup>a</sup>	State funds	Self-insurance <sup>b</sup>	Total	As a percentage of total benefits
<b>Federal programs<sup>e</sup></b>						
Subtotal	3,258,155	...	...	...	835,208	25.6
Civilian employee	2,462,059	...	...	...	671,056	27.3
Other	796,096	...	...	...	164,152	20.6

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.

NOTE: ... = not applicable.

- a. States with exclusive funds (North Dakota, Ohio, Washington, West Virginia, and Wyoming) may have small amounts of benefits paid by private carriers. This results from two sources: companies with group policies that overlap states and the fact that some companies include excess workers' compensation coverage in their reports of workers' compensation benefits to A.M. Best Company.
- b. Self-insurance includes individual self-insurers and group self-insurance.
- c. Medical percentage based on data provided by the National Council on Compensation Insurance.
- d. Medical percentage based on the weighted average of states where medical data were available.
- 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 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.

## 9.C Temporary Disability Insurance

**Table 9.C1—Selected data on state and railroad programs, 2004**

State and program <sup>a</sup>	Average annual covered employment (thousands)	Taxable payrolls (millions of dollars)	Average weekly number of beneficiaries (thousands)	Average weekly benefit (dollars)	Average duration per period paid (weeks)	Contributions collected (millions of dollars)	Net benefits paid (millions of dollars)	Administrative expenditures <sup>b</sup> (millions of dollars)
California <sup>c</sup>	12,669	436,612	--	--	--	--	3,586.9	235.7
State-operated fund	12,321	408,671	85.4	338.15	14.25	4,706.3	3,412.3	187.3
Private plans	348	27,941	--	489.42	14.04	278.0	174.6	48.4
Hawaii <sup>d</sup> (private plans)	524	8,398	--	331.29	3.80	50.7	43.2	--
New Jersey	<sup>e</sup> 3,404	--	--	--	--	--	604.6	<sup>f</sup> 30.8
State-operated fund	<sup>e</sup> 2,800	<sup>e</sup> 58,300	--	351.00	10.10	474.5	428.3	<sup>f</sup> 29.0
Private plans	<sup>e</sup> 604	--	--	--	--	--	176.3	<sup>f</sup> 1.8
New York	6,749	<sup>g</sup> 44,339	46.0	185.13	7.86	--	556.1	<sup>h</sup> 7.7
Special state fund <sup>i</sup>	...	...	0.3	155.77	13.51	--	2.8	--
Private plans <sup>j</sup>	6,749	44,339	45.7	185.35	7.83	--	<sup>k</sup> 553.3	--
Puerto Rico	--	--	--	--	--	--	--	--
State-operated fund	--	--	--	--	--	--	--	--
Private plans	--	--	--	--	--	--	--	--
Rhode Island (state-operated fund)	412	11,400	9.1	324.29	10.60	182.0	153.8	6.7
Railroad (publicly operated fund)	227	3,148	<sup>l</sup> 5.6	<sup>m</sup> 274.00	<sup>m</sup> 14.00	<sup>n</sup>	<sup>o</sup> 43.1	<sup>n</sup>

SOURCES: State agencies and Railroad Retirement Board.

NOTE: . . . = 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 2004.
- d. Includes data not shown separately for special fund for workers whose disability begins during unemployment.
- 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 \$11.1 million.
- k. Includes medical, surgical, and hospital benefits amounting to \$113 million paid under approved plans.
- l. For 14-day registration period.
- m. For benefit year 2003–2004 (July 1, 2003–June 30, 2004).
- n. Single system of contributions and administrative operations for railroad unemployment insurance and temporary disability; collections amounted to \$118.4 million and administrative expenses to \$19.7 million for the system in 2004.
- o. Of this amount, \$39.2 million was for regular benefits and \$3.9 million for extended benefits.

CONTACT: Alex Wasarhelyi (410) 965-8752.

## 9.D Black Lung Benefits

**Table 9.D1—Benefits currently payable to miners, widows, and dependents, December 1970–2006**

Year	Number				Benefits (thousands of dollars)	
	Total	Miners	Widows	Dependents <sup>a</sup>	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

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) 432-0116, ext. 126.

**Table 9.D2—Benefits currently payable to miners, widows, and dependents, by state or other area, December 2005**

State or area	Number				Monthly amount (thousands of dollars)		
	Total	Miners	Widows	Dependents <sup>a</sup>	Total	Miners <sup>b</sup>	Widows <sup>c</sup>
All areas	46,609	4,972	37,099	4,538	26,399	3,490	22,909
Alabama	1,675	126	1,414	135	992	70	922
Alaska	10	<sup>d</sup>	9	<sup>d</sup>	6	<sup>d</sup>	<sup>d</sup>
Arizona	154	9	140	5	90	6	84
Arkansas	270	23	233	14	153	13	141
California	314	25	279	10	168	14	155
Colorado	322	26	275	21	191	19	172
Connecticut	89	<sup>d</sup>	85	<sup>d</sup>	53	<sup>d</sup>	<sup>d</sup>
Delaware	68	5	60	3	39	3	36
District of Columbia	15	0	15	0	8	0	8
Florida	1,143	93	915	135	635	67	568
Georgia	224	13	203	8	139	10	129
Hawaii	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>
Idaho	18	<sup>d</sup>	16	<sup>d</sup>	12	<sup>d</sup>	<sup>d</sup>
Illinois	1,729	119	1,506	104	865	69	795
Indiana	877	66	755	56	495	46	449
Iowa	176	11	155	10	100	7	92
Kansas	72	<sup>d</sup>	71	<sup>d</sup>	41	<sup>d</sup>	<sup>d</sup>
Kentucky	6,804	1,112	4,690	1,002	3,865	794	3,071
Louisiana	25	<sup>d</sup>	23	<sup>d</sup>	15	<sup>d</sup>	<sup>d</sup>
Maine	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>
Maryland	460	30	399	31	260	21	239
Massachusetts	27	<sup>d</sup>	26	<sup>d</sup>	15	<sup>d</sup>	<sup>d</sup>
Michigan	548	30	485	33	309	20	289
Minnesota	15	<sup>d</sup>	14	<sup>d</sup>	9	<sup>d</sup>	<sup>d</sup>
Mississippi	31	<sup>d</sup>	27	<sup>d</sup>	22	<sup>d</sup>	<sup>d</sup>
Missouri	155	6	143	6	86	5	82
Montana	52	4	45	3	30	3	27
Nebraska	5	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	3	<sup>d</sup>	<sup>d</sup>
Nevada	48	<sup>d</sup>	43	<sup>d</sup>	27	<sup>d</sup>	<sup>d</sup>
New Hampshire	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>
New Jersey	371	20	330	21	210	14	196
New Mexico	103	5	90	8	57	3	54
New York	328	13	303	12	186	9	177
North Carolina	479	37	413	29	286	25	261
North Dakota	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>
Ohio	2,969	215	2,585	169	1,677	151	1,526
Oklahoma	202	17	174	11	116	12	105
Oregon	34	4	27	3	21	3	18
Pennsylvania	10,965	912	9,417	636	6,240	642	5,598
Rhode Island	6	<sup>d</sup>	5	<sup>d</sup>	3	<sup>d</sup>	<sup>d</sup>
South Carolina	175	14	146	15	103	10	93
South Dakota	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>
Tennessee	2,012	175	1,659	178	1,105	124	981
Texas	157	9	136	12	88	6	82
Utah	207	24	166	17	118	17	101
Vermont	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>
Virginia	3,811	557	2,765	489	2,186	403	1,783
Washington	84	7	73	4	47	4	42
West Virginia	9,213	1,249	6,630	1,334	5,232	887	4,345
Wisconsin	28	<sup>d</sup>	24	<sup>d</sup>	15	<sup>d</sup>	<sup>d</sup>
Wyoming	69	<sup>d</sup>	64	<sup>d</sup>	39	<sup>d</sup>	<sup>d</sup>
Outlying areas <sup>e</sup>	55	4	47	4	34	3	31

SOURCE: Department of Labor, Beneficiary Master Table, 100 percent data.

- 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.
- Not shown to avoid disclosure of information regarding particular individuals.
- Includes beneficiaries residing in American Samoa, Guam, Northern Mariana Islands, Puerto Rico, Virgin Islands, and foreign countries.

CONTACT: Bennett Stewart (606) 432-0116, ext. 126.

## 9.D Black Lung Benefits

**Table 9.D2—Benefits currently payable to miners, widows, and dependents, by state or other area, December 2006**

State or area	Number				Monthly amount (thousands of dollars)		
	Total	Miners	Widows	Dependents <sup>a</sup>	Total	Miners <sup>b</sup>	Widows <sup>c</sup>
All areas	40,018	4,217	32,168	3,633	24,282	3,051	21,231
Alabama	1,434	80	1,260	94	909	57	852
Alaska	8	0	8	0	7	0	7
Arizona	120	7	109	4	72	5	67
Arkansas	237	16	210	11	141	11	130
California	236	17	207	12	143	11	131
Colorado	279	23	236	20	168	17	152
Connecticut	71	<sup>d</sup>	67	<sup>d</sup>	43	<sup>d</sup>	<sup>d</sup>
Delaware	58	<sup>d</sup>	52	<sup>d</sup>	35	<sup>d</sup>	<sup>d</sup>
District of Columbia	15	0	15	0	9	0	9
Florida	944	82	800	62	572	59	513
Georgia	186	13	166	7	116	8	108
Hawaii	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>
Idaho	17	<sup>d</sup>	15	<sup>d</sup>	11	<sup>d</sup>	<sup>d</sup>
Illinois	1,263	80	1,104	79	767	61	707
Indiana	724	56	609	59	450	40	410
Iowa	146	8	128	10	89	6	83
Kansas	51	0	51	0	31	0	31
Kentucky	6,186	981	4,321	884	3,645	714	2,931
Louisiana	23	<sup>d</sup>	21	<sup>d</sup>	13	<sup>d</sup>	<sup>d</sup>
Maine	0	0	0	0	0	0	0
Maryland	355	26	311	18	230	18	212
Massachusetts	18	<sup>d</sup>	16	<sup>d</sup>	11	<sup>d</sup>	<sup>d</sup>
Michigan	416	23	378	15	273	15	258
Minnesota	11	<sup>d</sup>	10	<sup>d</sup>	7	<sup>d</sup>	<sup>d</sup>
Mississippi	33	<sup>d</sup>	30	<sup>d</sup>	22	<sup>d</sup>	<sup>d</sup>
Missouri	133	6	122	5	82	4	78
Montana	47	4	40	3	28	3	25
Nebraska	4	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	3	<sup>d</sup>	<sup>d</sup>
Nevada	38	<sup>d</sup>	36	<sup>d</sup>	23	<sup>d</sup>	<sup>d</sup>
New Hampshire	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>
New Jersey	292	16	260	16	177	11	165
New Mexico	81	5	70	6	51	3	47
New York	249	12	227	10	159	8	151
North Carolina	410	35	348	27	252	24	228
North Dakota	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>
Ohio	2,422	178	2,098	146	1,532	128	1,404
Oklahoma	174	16	146	12	103	11	92
Oregon	26	<sup>d</sup>	24	<sup>d</sup>	18	<sup>d</sup>	<sup>d</sup>
Pennsylvania	9,343	759	8,026	558	5,686	542	5,144
Rhode Island	5	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	3	<sup>d</sup>	<sup>d</sup>
South Carolina	139	9	122	8	86	6	80
South Dakota	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>
Tennessee	1,643	158	1,346	139	1,008	114	894
Texas	116	6	107	3	75	4	71
Utah	187	22	149	16	108	15	93
Vermont	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>
Virginia	3,466	495	2,548	423	2,050	364	1,686
Washington	76	5	67	4	44	3	41
West Virginia	8,192	1,059	6,167	966	4,943	772	4,171
Wisconsin	25	<sup>d</sup>	23	<sup>d</sup>	14	<sup>d</sup>	<sup>d</sup>
Wyoming	57	<sup>d</sup>	56	<sup>d</sup>	35	<sup>d</sup>	<sup>d</sup>
Outlying areas <sup>e</sup>	51	4	42	5	32	3	29

SOURCE: Department of Labor, Beneficiary Master Table, 100 percent data.

- 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.
- Not shown to avoid disclosure of information regarding particular individuals.
- Includes beneficiaries residing in American Samoa, Guam, Northern Mariana Islands, Puerto Rico, Virgin Islands, and foreign countries.

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**Table 9.F1—Number of disability compensation or pension payments, by type of payment and age of beneficiary, selected years, 1940–2006 (in thousands)**

Year	Total <sup>a</sup>	Service-connected							Not service-connected		
		All ages	Under age 65			Aged 65 or older					
			Subtotal	Disability rating <sup>b</sup>		Subtotal	Disability rating <sup>b</sup>				
				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 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)

## 9.F Veterans' Benefits

**Table 9.F1—Number of disability compensation or pension payments, by type of payment and age of beneficiary, selected years, 1940–2006 (in thousands)—Continued**

Year	Total <sup>a</sup>	Service-connected							Not service-connected		
		All ages	Under age 65			Aged 65 or older					
			Subtotal	Disability rating <sup>b</sup>		Subtotal	Disability rating <sup>b</sup>				
				Less than 70 percent	70–100 percent		Less than 70 percent	70–100 percent			
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

SOURCE: Department of Veterans Affairs, published and unpublished data.

NOTE: . . . = not applicable.

- Persons receiving payments under special acts and as retired emergency and reserve officers are included in the total but not in the distribution. (Totals may not add up because of rounding.)
- 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

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<b>A. Sampling Variability</b>	<b>A.1</b>
<b>B. OASDI Benefit Award Data</b>	<b>B.1</b>
<b>C. Poverty Data</b>	<b>C.1</b>
<b>D. Computing a Retired-Worker Benefit</b>	<b>D.1</b>



## Appendix A: Sampling Variability

A substantial number of tables in sections 5 and 6 present Old-Age, Survivors, and Disability Insurance (OASDI) award and current-pay benefit 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, and Tables 7.A8, 7.B9, and 7.E2 on SSI awards are based on 10 percent administrative record samples.

Because of sampling variability, estimates based on sample data may 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.

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## 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 data base 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 selected years 1959–2006. Table 3.E2 presents year-end data on the number and percentage of people in poverty in the United States for 1959–2005. Tables 3.E3 and 3.E6 present more detailed data on people and families in poverty in the United States during 2005; Table 3.E4 presents similar data by current living arrangement. (Both poverty thresholds and poverty population data are issued by the U.S. Census Bureau.) Table 3.E8 presents poverty guidelines by family size for the contiguous United States, Alaska, and Hawaii for 1965–2007. (Poverty guidelines are issued by the U.S. 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 U.S. 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 Smith, “Income, Poverty, and Health Insurance Coverage in the United States: 2006,” U.S. Census Bureau, *Current Population Reports*, P60-233 [2007] Appendix B; and Joseph Dalaker and Bernadette D. Proctor, “Poverty in the United States: 1999,” U.S. 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 (CPI-U). (See U.S.

Bureau of the Census, “Revision in Poverty Statistics, 1959 to 1968,” *Current Population Reports*, Special Studies, P-23, No. 28 [1969]; and U.S. 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 the age of 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

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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 consumer price index 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 U.S. 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 the age of 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 more than 35 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 spe-

cific 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 U.S. 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](mailto:bernadette.d.proctor@census.gov).

For further information about the statistical reliability of the CPS estimates, contact [dsmd\\_s&a@census.gov](mailto: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 the age of 15 not living with any family members are excluded. (Previously, unrelated individuals under the age of 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. The worksheet can be used for persons born in 1932 through 1945—that is, those who attained the age of 62 in 2007 or earlier and were under the age of 75 at the end of 2007. The worksheet assumes that the worker had no prior period of entitlement to disability benefits and also 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 earnings over a period of time that the worker could be expected to have worked in covered employment—from age 22 through age 61. The years of earnings considered are termed *computation years*. The worker's 5 lowest earnings years, including years of no earnings at all, are not considered in the computation. They are termed the *drop-out years*.
- *To index lifetime earnings.* Earnings used in the computation are not the actual covered earnings but an amount for each year that reflects earnings increases in average wage levels after the year 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 the age of 62 in 2007, actual earnings in 1985 of \$20,000 are indexed to \$45,804.50, on the basis of 2005 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 2007 is 90 percent of the first \$680 of AIME; plus 32 percent of the next \$3,420; plus 15 percent of the AIME over \$4,100.
- *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 (66 in 2007 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 2007, 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 the age of 62.* Benefits are adjusted annually in December to reflect increases in the consumer price index (CPI-W). The benefit increase in 2006 was 3.3 percent. These cost-of-living adjustments are applied to the benefit for each year after the person attained the age of 62—even if the person was not actually receiving benefits.
- *To give credit for earnings after age 61.* Earnings after the age of 61 (which are not indexed) can be substituted for earnings in earlier years if they result in a higher benefit. In addition, persons who do not receive benefits between the FRA and age 69 may receive increased benefits as a result of the delayed retirement credit (DRC) provision. The benefit is increased by a specified percentage for each month a benefit was not received. (See Table 2.A20 for percentage increases.)

### Clarifying the Worksheet Procedure

#### Step 1 - Determining the Number of Computation Years

For persons who attain age 62 before 1991, the number of years used in the benefit computation equals the number of years after 1950 up to the year of attainment of age 62, minus 5 years. For workers who attain age 62 in 1991 or later, 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 second year before attainment of the age of 62. However, beneficiaries born on January 1 are deemed to have attained age 62 in the prior year, and consequently, the applicable indexing year, factors, and bend points are those for that 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, a person attains age 62 in 2007. The indexing year is 2005. The average annual wage for 2005 was \$36,952.94. The average annual wage for 1990 was \$21,027.98. The amount, \$36,952.94 divided by \$21,027.98, yields a factor of 1.7573224.

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 1.7573224, result in indexed earnings of \$17,573.22; actual earnings of \$51,300 (the maximum creditable) result in indexed earnings of \$90,150.64.

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### 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 2007, 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 = \$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 2007, the bend points are \$680 and \$4,100. Thus the formula is 90 percent of the first \$680 of AIME; plus 32 percent of the next \$3,420 of AIME; plus 15 percent of AIME above \$4,100. The following are examples of PIA computations for such workers with different AIME amounts.

#### Example 1 - AIME of \$300

PIA is \$270

Based on: 90 percent of \$300

#### Example 2 - AIME of \$952

PIA is \$699.04 rounded to \$699.00

Based on: 90 percent of \$680 (\$612.00); plus  
32 percent of \$272 (\$87.04)

#### Example 3 - AIME of \$4,500

PIA is \$1,766.40

Based on: 90 percent of \$680 (\$612.00); plus  
32 percent of \$3,420 (\$1,094.40); plus  
15 percent of \$400 (\$60)

The above calculations are applicable to workers who attain the age of 62 in 2007. 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 2007. Worksheet 2 shows cost-of-living increase factors for 1979 through 2006. After the PIA is calculated for the year of attainment of age 62, cost-of-living increases are applied for each year through 2006. The result is the current 2007 PIA.

For example, a worker who attained age 62 in 2004 would receive cost-of-living adjustments for the years 2004–2006. The adjustments are cumulative, with each step rounded to the next lower dime. If the PIA at age 62 was \$500, the cost-of-living adjustments would be:

2004: \$500 multiplied by 1.027 = \$513.50

2005: \$513.50 multiplied by 1.041 = \$534.50

2006: \$534.50 multiplied by 1.033 = \$552.10

\$552.10 would be the PIA effective December 2006.

### Step 5 - Computation of the Monthly Benefit

The full PIA is payable to a worker who retires at the full retirement age (FRA). Beginning in the year 2000, the FRA, scheduled to be gradually raised to age 67 for workers attaining age 62 in 2022, began to be phased in. 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 full retirement age plus 5/12 of 1 percent for each of up to 24 earlier months. Workers attaining the age of 62 in 2007 have their benefits computed based on the full retirement age 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 2005, the maximum reduction is 25 percent.

For example, in 2007 a worker with a PIA of \$500 would receive \$375 at the age of 62. The PIA is reduced by \$124.99, reflecting a reduction rate of 5/9 of 1 percent for each of 36 months and a rate of 5/12 of 1 percent for each of 12 months for a total reduction of 25 percent. After reduction of the PIA by \$124.99, the benefit amount is rounded down to the nearest lower dollar.

**Instructions for computing a retired-worker benefit (only for workers attaining age 62 in years 1994–2007)**

<b>STEP 1.—Determining the Number of Computation Years</b>		
1	Year of birth. (If your birthday is January 1, enter prior year.)	
2	Age “62” has been entered.	62
3	Add lines 1 and 2 to obtain year of attainment of age 62 (year of eligibility).	
4	Year of attainment of age 22. If 1951 or earlier, enter 1951 (If your birthday is January 1, enter prior year.)	
5	Subtract line 4 from line 3 (elapsed years).	
6	“5” (drop-out years) has been entered.	5
7	Subtract line 6 from line 5 (computation years—maximum 35).	
<b>STEP 2.—Indexing of Earnings (Use Worksheet 1 for Steps 2 and 3.)</b>		
8	Enter in column 2 your earnings in each year 1951 through 2006. If none, enter “0.”	
9	Column 3 contains the maximum earnings creditable under Social Security for each year.	
10	Enter in column 4 the lower amount from columns 2 or 3 for each year.	
11	Enter in column 5 the indexing factors applicable to the year you attained age 62 (line 3) from Table 2.A8. (This table contains the indexing factors for persons attaining age 62 during the period 1994–2007.)	
12	Multiply column 4 by column 5 and enter results in column 6 in dollars and cents. These are your indexed earnings.	
<b>STEP 3.—Computing the Average Indexed Monthly Earnings (AIME)</b>		
13	Enter the number of computation years from line 7.	
14	Place an “X” in column 7 next to the highest indexed earnings corresponding with the number of computation years from line 13.	
15	Add all individual indexed earnings marked with an “X.”	
16	Multiply line 13 (computation years) by 12 to obtain the number of months in the computation period.	
17	Divide line 15 by line 16.	
18	Round the result in line 17 to the next lower dollar. This is your average indexed monthly earnings (AIME).	
<b>STEP 4.—Computing the Primary Insurance Amount (PIA) (Use Worksheet 2 for Step 4.)</b>		
19	Enter first bend point from Worksheet 2 based on year of attainment of age 62, or prior year if birthday is January 1.	
20	Enter second bend point from Worksheet 2.	
21	If your AIME (obtained in line 18) is equal to or less than line 19, complete lines 22–24; if greater than line 19 but less than or equal to line 20, complete lines 25–30; if greater than line 20, complete lines 31–37.	
22	Enter your AIME from line 18.	
23	“0.9” has been entered. If you receive a pension on the basis of noncovered employment, see Table 2.A11.1.	0.9
24	Multiply line 22 by line 23, and round to next lower dime to obtain your PIA at age 62. Continue with line 38.	
25	Enter your AIME from line 18.	
26	Multiply line 19 by 0.9. If you receive a pension on the basis of noncovered employment, see Table 2.A11.1.	
27	Subtract line 19 from line 25.	
28	“0.32” has been entered.	0.32
29	Multiply line 27 by line 28.	
30	Add lines 26 and 29, and round to next lower dime to obtain your PIA at age 62. Continue with line 38.	
31	Enter your AIME from line 18.	
32	Multiply line 19 by 0.9. If you receive a pension on the basis of noncovered employment, see Table 2.A11.1.	
33	Subtract line 19 from line 20 and multiply by 0.32.	
34	Subtract line 20 from line 31.	
35	“0.15” has been entered.	0.15
36	Multiply line 34 by line 35.	
37	Add lines 32, 33, and 36, and round to the next lower dime to obtain your PIA at age 62. Continue with line 38.	

(Continued)

**Instructions for computing a retired-worker benefit (only for workers attaining age 62 in years 1994–2007)—Continued**

38	If you attained age 62 in 2007, skip to line 44. Otherwise you will need to adjust your PIA to reflect cost-of-living adjustments (COLAs) from the year you attained age 62 through 2006 by using lines 39–43 and Worksheet 2.	
39	Enter year of attainment of age 62 from line 3.	
40	Place an “X” corresponding to the year you attained age 62 in column 5, Worksheet 2.	
41	Place an “X” in column 5 (Worksheet 2) next to each subsequent year through 2006.	
42	Enter your PIA at age 62 from either line 24, 30, or 37—here and in the first row of column 6, Worksheet 2.	
43	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 2006. Enter this last figure, which is your current PIA.	

**STEP 5.—Computing the Monthly Benefit**

44	Enter your current PIA from either line 24, 30, 37, or 43.	
45	Using Table 2.A17.1, determine your full retirement age and enter here.	
46	If you retired at your full retirement age, round PIA from line 44 to the next lower dollar to obtain your monthly benefit.	
47	If you retired before the full retirement age, enter your age at retirement including year and months.	
48	Subtract line 47 from line 45, and convert the result to months to determine the total number of reduction months.	
49	If line 48 is greater than 36, subtract 36 and enter the number here.	
50	“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
51	“0.0041667” (the decimal equivalent of 5/12 of 1 percent—the monthly reduction factor for months above 36) has been entered.	0.0041667
52	Multiply line 48 (but not more than 36) by line 50 to obtain the percent reduction for the first 36 months.	
53	Multiply line 49 by line 51 to obtain the percent reduction for months in excess of 36.	
54	Add lines 52 and 53 to obtain the total percent reduction.	
55	Multiply line 44 by line 54 to obtain the amount of benefit reduction.	
56	Subtract line 55 from line 44, 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				

**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	<sup>a</sup> 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	...	...		

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

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## 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.

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**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).** An individual charge determined (approved amount) by a carrier 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 is 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 after 1950 (or the year of attainment of age 21, if later) and up to the year in which the worker attains age 62, becomes disabled, or dies, minus dropout years, generally 5 (minimum number of computation years is 2);
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 by the age attained in year of disability onset. The number is 0, 1, 2, 3, 4, and 5 for workers aged 26 or younger, 27–31, 32–36, 37–41, 42–46, and 47 or older, respectively. Effective for months after June 1981, however, disabled workers under age 37 may obtain up to 3 additional dropout years (3, 2, and 1, respectively, for those aged 26 or younger, 27–31, and 32–36) for which the worker had no earnings and was living with a child (of the worker or his or her spouse) 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 AIME method. The AMW is computed by—

1. Determining the number of computation years—the number of years after 1950 (or the year of attainment of age 21, if later) and up to 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 dropout years, generally 5 (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 AIME (average indexed monthly earnings) or PIA (primary insurance amount) brackets in the benefit formulas. See Tables 2.A11 and 2.A13.

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**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**.

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**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, all references to the CPI relate to the CPI for Urban Wage Earners and Clerical Workers (CPI-W).

**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.

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**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).** Takes into account the income and resources of certain persons who live with an SSI recipient when determining the amount of the payment. 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) 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 (DRG) 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.



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**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**.

**drug addiction and alcoholism (OASDI and SSI).** Legislation enacted in 1996 eliminated drug addiction and alcoholism (DA&A) 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, usually a spouses 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 or a disabled-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.

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**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 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,

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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 information about the GPO, 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 who supplies the labor or property.

**health maintenance organization—HMO (Medicare).** 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

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- 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 for insured status, 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
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with limited benefits unless they became entitled before their own full retirement age. See **widow(er)'s benefit**.

**Low-Income Home Energy Assistance Program—LIHEAP.** Federal program to assist low-income households with heating and cooling costs.

**lump-sum death benefit (OASDI).** A one-time payment, generally \$255, payable on the death of a fully or currently insured worker. The lump sum is payable to the surviving spouse of the worker, under most circumstances, or if there is no spouse, to the worker's entitled children.

**managed care (Medicare).** Includes health maintenance organizations (HMOs), competitive medical plans (CMPs), 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 dependents or survivors 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 (MSA), and the beneficiary is expected to use that money to pay for medical expenses above the annual deductible. MSAs are currently a test program.

**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

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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 (through a demonstration available to up to 390,000 beneficiaries); 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 non-contributory 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 \$93.50 is deducted, the MBC is \$967.50 (calculated as follows:  $\$968.20 - \$93.50 = \$874.70$  rounded down to  $\$874.00 + \$93.50 = \$967.50$ ).

**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.

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**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 and to survivors of deceased insured workers (OASI), and
2. Disabled-worker beneficiaries and their spouses and children and for providing rehabilitation services to the disabled (DI).

**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 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, are placed by agencies in private households, and 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 insurance 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.

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**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 AIME (average indexed monthly earnings) 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 provisions of the Railroad Retirement Act provide 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.



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**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.

**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

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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—SGA (DI and SSI).** Remunerative work that is substantial, as determined from considering the amount of money earned, and or 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.

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**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 and/or self-employment income that is under the applicable annual maximum taxable limit.

**taxable maximum (OASDI and HI).** See **annual maximum taxable limit**.

**taxable self-employment income (OASDI and HI).** The maximum amount of net earnings from self-employment by an earner which, when added to any taxable wages, does not exceed the contribution and benefit base. For Hospital Insurance beginning in 1994, all net earnings from self-employment.

**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: beneficiary is entitled to the same type of benefit on more than one earnings record; (2) Potential dual entitlement: 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 Assistance for Needy Families—TANF.** Created by the Personal Responsibility and Work Opportunities Reconciliation Act of 1996, TANF provides assistance and work opportunities to needy families. Replaced Aid to Families with Dependent Children (AFDC), Emergency Assistance, and Job Opportunities and Basic Skills Training (JOBS) programs.

**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

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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 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

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windfall to persons who receive a pension from a job where 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.

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## Abbreviations

<b>AB</b>	Aid to the Blind
<b>ACF</b>	Administration for Children and Families
<b>ACR</b>	Adjusted Community Rate
<b>AET</b>	Annual earnings test
<b>AFDC</b>	Aid to Families with Dependent Children
<b>AFDC-UP</b>	Aid to Families with Dependent Children-Unemployed Parents
<b>AIDS</b>	Acquired immune deficiency syndrome
<b>AIME</b>	Average indexed monthly earnings
<b>AMW</b>	Average monthly wage
<b>APTD</b>	Aid to the Permanently and Totally Disabled
<b>BBA</b>	Balanced Budget Act of 1997
<b>BC/BS</b>	Blue Cross/Blue Shield
<b>CDR</b>	Continuing disability review
<b>CHAMPVA</b>	Civilian Health and Medical Program of the Department of Veterans Affairs
<b>CLIA</b>	Clinical Laboratory Improvement Act
<b>CMP</b>	Competitive medical plans
<b>CMS</b>	Centers for Medicare & Medicaid Services
<b>COBRA</b>	Consolidated Omnibus Budget Reconciliation Act
<b>COLA</b>	Cost-of-living adjustment
<b>CPI-U</b>	Consumer price index for all urban consumers
<b>CPI-W</b>	Consumer price index for urban wage earners and clerical workers
<b>CPS</b>	Current Population Survey
<b>DA&amp;A</b>	Drug addiction and alcoholism
<b>DHHS</b>	Department of Health and Human Services
<b>DI</b>	Disability Insurance
<b>DME</b>	Durable medical equipment
<b>DOE</b>	Department of Energy
<b>DOL</b>	Department of Labor
<b>DRG</b>	Diagnosis-related group
<b>EA</b>	Emergency Assistance
<b>EBT</b>	Electronic benefit transfer
<b>EPSDT</b>	Early and Periodic Screening, Diagnostic, and Treatment program
<b>ESRD</b>	End-stage renal disease
<b>FDA</b>	Food and Drug Administration
<b>FERS</b>	Federal Employees Retirement System
<b>FFS</b>	Fee for service
<b>FICA</b>	Federal Insurance Contributions Act
<b>FMAP</b>	Federal medical assistance percentage
<b>FPL</b>	Federal poverty level
<b>FQHC</b>	Federally qualified health center
<b>FRA</b>	Full retirement age
<b>FUTA</b>	Federal Unemployment Tax Act
<b>FY</b>	Fiscal year

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<b>GDP</b>	Gross domestic product
<b>GPO</b>	Government Pension Offset
<b>HCBS</b>	Home and community based services
<b>HCFA</b>	Health Care Financing Administration
<b>HHA</b>	Home health agency
<b>HHS</b>	Department of Health and Human Services
<b>HI</b>	Hospital Insurance
<b>HIV</b>	Human immunodeficiency virus
<b>HMO</b>	Health maintenance organization
<b>ICF</b>	Intermediate care facility
<b>ICFs/MR</b>	Intermediate care facilities for the mentally retarded
<b>LIHEAP</b>	Low-Income Home Energy Assistance Program
<b>LTC</b>	Long-term care
<b>MA</b>	Medicare Advantage
<b>MBC</b>	Monthly benefit credited
<b>MBR</b>	Master Beneficiary Record
<b>MCCA</b>	Medicare Catastrophic Coverage Act
<b>MCCRA</b>	Medicare Catastrophic Coverage Repeal Act
<b>MMA</b>	Medicare Prescription Drug, Improvement, and Modernization Act
<b>MN</b>	Medically needy
<b>MSA</b>	Medical savings account
<b>NRC</b>	National Research Council
<b>OAA</b>	Old-Age Assistance
<b>OASDI</b>	Old-Age, Survivors, and Disability Insurance
<b>OASI</b>	Old-Age and Survivors Insurance
<b>OBRA</b>	Omnibus Budget Reconciliation Act
<b>OEO</b>	Office of Economic Opportunity
<b>OMB</b>	Office of Management and Budget
<b>PACE</b>	Programs of all-inclusive care for the elderly
<b>PDP</b>	Prescription Drug Plan
<b>PESS</b>	Property essential to self-support
<b>PIA</b>	Primary insurance amount
<b>PIB</b>	Primary insurance benefit
<b>PPO</b>	Preferred provider organization
<b>PPS</b>	Prospective payment system
<b>PRO</b>	Peer review organization
<b>PSO</b>	Provider-sponsored organization
<b>QC</b>	Quarter of coverage
<b>QDWIS</b>	Qualified disabled working individuals
<b>QI</b>	Qualified individual
<b>QMB</b>	Qualified Medicare beneficiary
<b>RVS</b>	Relative value scale
<b>SCHIP</b>	State Children's Health Insurance Program
<b>SECA</b>	Self-Employment Contributions Act
<b>SGA</b>	Substantial gainful activity

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<b>SIPP</b>	Survey of Income and Program Participation
<b>SLMB</b>	Specified low-income Medicare beneficiary
<b>SMI</b>	Supplementary Medical Insurance
<b>SNF</b>	Skilled nursing facility
<b>SSA</b>	Social Security Administration
<b>SSI</b>	Supplemental Security Income
<b>TANF</b>	Temporary Assistance for Needy Families
<b>TDI</b>	Temporary Disability Insurance
<b>TEFRA</b>	Tax Equity and Fiscal Responsibility Act
<b>TWP</b>	Trial work period
<b>USDA</b>	U.S. Department of Agriculture
<b>VA</b>	Department of Veterans Affairs
<b>VEAP</b>	Veterans' Educational Assistance Program
<b>WEP</b>	Windfall Elimination Provision
<b>WIN</b>	Work Incentive Program



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