

## Preface

The *Supplement* is a major data resource on our nation's social insurance and welfare programs. The majority of the data concern the Old-Age, Survivors, and Disability Insurance programs, known collectively as Social Security, and the Supplemental Security Income 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 (SSA'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. One of our most important goals is to provide clear and meaningful program data. For this reason, we have repackaged the all-in-one Table 5.A1 into smaller, more manageable statistical tables so that it is easier to locate data on specific beneficiary populations.

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

General questions or comments about this report are welcome and should be directed to Rona M. Blumenthal at 410-965-0163 or [rona.m.blumenthal@ssa.gov](mailto:rona.m.blumenthal@ssa.gov). For specific questions about the data, please call the contact listed on each table.

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for Research, Evaluation, and Statistics

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## Contents

vi	<b>Abbreviations</b>
ix	<b>List of Tables</b>
1	<b>Highlights and Trends</b>
9	<b>Social Security</b>
18	<b>Supplemental Security Income</b>
	<b>Health Care</b>
38	Medicare
52	Medicaid
	<b>Other Social Insurance and Veterans ' Benefits</b>
58	Unemployment Insurance
61	Workers' Compensation
63	Temporary Disability Insurance
65	Black Lung Benefits
66	Veterans' Benefits
	<b>Public Assistance</b>
69	Temporary Assistance for Needy Families
72	Food Stamps
77	Low-Income Home Energy Assistance Program
	<b>Appendixes</b>
339	A: Sampling Variability
341	B: OASDI Benefit Award Data
342	C: Poverty Data
345	D: Computing a Retired-Worker Benefit
351	<b>Glossary</b>
371	<b>Index to Tables</b>

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## Abbreviations

<b>AB</b>	Aid to the Blind
<b>ACF</b>	Administration for Children and Families
<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>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
<b>ESRD</b>	End stage renal disease
<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

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<b>FUTA</b>	Federal Unemployment Tax Act
<b>FY</b>	Fiscal year
<b>GDP</b>	Gross domestic product
<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>JOBS</b>	Job Opportunities and Basic Skills Training
<b>LIHEAP</b>	Low-Income Home Energy Assistance Program
<b>LTC</b>	Long-term care
<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>MN</b>	Medically needy
<b>MOE</b>	Maintenance of effort
<b>MSA</b>	Medical savings account
<b>NEW</b>	Native Employment Works
<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>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

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<b>QDWIS</b>	Qualified disabled working individuals
<b>QI</b>	Qualified individual
<b>QMB</b>	Qualified Medicare beneficiary
<b>REACH</b>	Residential Emergency Assistance Challenge
<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
<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>TEFRA</b>	Tax Equity and Fiscal Responsibility Act
<b>TFP</b>	Thrifty Food Plan
<b>TWP</b>	Trial work period
<b>USDA</b>	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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# List of Tables

## History of OASDI Provisions

### Coverage, Financing, and Insured Status

Page

80	2.A1	Type of covered employment and self-employment
82	2.A2	Noncontributory wage credits
83	2.A3	Annual maximum taxable earnings and actual contribution rates, 1937–2002 and thereafter
84	2.A4	Maximum annual amount of contribution, 1937–2002
85	2.A5	Tax credits
85	2.A6	Appropriations from general revenues and interfund borrowing
86	2.A7	Insured status (benefit eligibility)

### Benefit Computation and Automatic Adjustments

88	2.A8	Factors for indexing earnings, 1951–2002
90	2.A9	Indexed earnings for workers with maximum earnings, 1951–2002
91	2.A10	Average monthly wage (AMW) and average indexed monthly earnings (AIME)
92	2.A11	Formulas for computing primary insurance amount (PIA) from AIME, increases in PIA based on cost-of-living adjustments, and minimum PIA, for workers who were first eligible (attained age 62, became disabled, or died) in 1979 or later
93	2.A11.1	Computation of PIA based on Windfall Elimination Provision (WEP)
94	2.A12	Special minimum PIA (formula applies to years of coverage)
96	2.A13	Formulas for computing maximum family benefit from primary insurance amount (PIA), and increases in maximum based on cost-of-living adjustments, for workers who attained age 62 or died (before attaining age 62) in 1979 or later
96	2.A14	Formulas for computing maximum family benefit, and increases in maximum based on cost-of-living adjustments, for workers first eligible for disability benefits in 1979 or later
	2.A15	Discontinued
97	2.A16	Formulas for computing primary insurance amount (PIA) from average monthly wage (AMW) based on earnings after 1950, and percentage increases in PIA
99	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
100	2.A18	Automatic adjustment provisions
102	2.A19	Cumulative effect of statutory and automatic increases in benefits: 100 dollar base benefit

### Benefit Types and Levels

104	2.A20	Monthly benefits for retired and disabled workers
105	2.A21	Monthly benefits for spouses and children of retired and disabled workers
107	2.A22	Monthly benefits for survivors of deceased workers
111	2.A23	Monthly benefits for transitionally insured workers and their spouses and surviving spouses, aged 72 before 1969
112	2.A24	Monthly benefits for individuals and couples insured for special age-72 (Prouty) benefits
113	2.A25	Lump-sum benefits and vocational rehabilitation services
114	2.A26	Monthly benefit amount for selected beneficiary families with first eligibility in 2001, by average indexed monthly earnings for selected wage levels, effective December 2001
115	2.A27	Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 62, 1957–2002
116	2.A28	Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 65, 1940–2002

### Effect of Current Earnings and Taxation of Benefits

118	2.A29	Earnings (retirement) test
120	2.A30	Earnings guidelines regarding substantial gainful activity (SGA), 1961–2002

- 
- 121 2.A31 Taxation of Social Security benefits
  - 122 2.A32 Taxation of Social Security benefits: Examples

## **History of SSI, Medicare, and Medicaid Provisions**

### **Supplemental Security Income**

- 123 2.B1 Federal benefit rates, 1974–2002

### **Medicare**

- 124 2.C1 Medicare cost sharing and premium amounts, 1966–2003

### **Medicaid**

- 125 2.C2 Federal medical assistance percentage and enhanced federal medical assistance percentage, by state or other area, 2001 and 2002

## **SSA Administrative Data**

### **Offices and Staff**

- 126 2.F1 Number of SSA offices, 2001
- 126 2.F2 Number of SSA employees and percentage distribution who are women, minorities and disabled, by grade, September 30, 2001
- 126 2.F3 Number of work years, fiscal years, 1992–2001

### **Claims Workloads**

- 127 2.F4 Number of Old-Age and Survivors Insurance claims, fiscal year 2001
- 127 2.F5 Number of Disability Insurance claims, fiscal year 2001
- 127 2.F6 Number of Supplemental Security Income claims, fiscal year 2001

### **Service Delivery**

- 128 2.F7 Accuracy rates and use of 800 telephone number, fiscal years 1997–2001

### **Hearings and Appeals**

- 129 2.F8 Workload of SSA's Administrative Law Judges (ALJs), fiscal years 2000–2002
- 129 2.F9 Number of hearing receipts, dispositions, and end-of-year pending cases, fiscal years 2001–2002
- 129 2.F10 Number of civil litigation cases, fiscal year 2001
- 129 2.F11 Number of SSA Appeals Council cases, fiscal years 2000–2002

## **Social Welfare and the Economy**

### **Social Welfare Expenditures**

- 130 3.A1 Gross domestic product (GDP) and social welfare expenditures under public programs, selected fiscal years 1965–1995
- 3.A2 Discontinued
- 131 3.A3 Social welfare expenditures under public programs, selected fiscal years 1965–1995
- 132 3.A4 Private social welfare expenditures, by category and as a percent of gross domestic product (GDP), selected years, 1980–1994

### **Employment and Earnings**

- 3.B1 Discontinued
- 3.B2 Discontinued
- 133 3.B3 Federal minimum wage rates under the Fair Labor Standards Act and average hourly earnings and average weekly hours for production workers in manufacturing, selected years 1938–2001



---

## Interprogram Data

	3.C1	Discontinued
	3.C2	Discontinued
134	3.C3	Selected social insurance programs: Source of funds from contributions, selected years 1965–2001
135	3.C4	Average monthly amount of Social Security and selected public assistance programs: December 1950–2001
136	3.C5	Population aged 65 or older receiving Social Security (OASDI) benefits, Supplemental Security Income (SSI) payments, or both, by state rank, December 1940–2001, selected years
137	3.C6	Number and percentage of Social Security (OASDI) beneficiaries also receiving federally administered Supplemental Security Income (SSI) payments, by SSI eligibility category and type of OASDI benefit, December 2001
138	3.C6.1	Number of persons aged 18–64 receiving Social Security (OASDI) benefits or federally administered Supplemental Security Income payments based on disability, by type of benefit, December 1978–2001
139	3.C7	Number of persons aged 15 or older with Social Security (OASDI) benefits or Supplemental Security Income, by sex, age, and race in March 2001, and median annual benefit in 2000
140	3.C8	Number of persons aged 15 or older with Social Security (OASDI) benefits or Supplemental Security Income and number and percentage of Hispanic origin, by age and sex in March 2001, and median annual benefit in 2000

## Poverty

141	3.E1	Weighted average poverty thresholds for nonfarm families of specified size, 1959–2001
142	3.E2	Number and percentage of poor persons, by age, at end of selected years 1959–2000
143	3.E3	Shares of money income from earnings and other sources for aged and nonaged families, 2000
144	3.E4	Current living arrangements of persons aged 65 or older, March 2001
	3.E5	Discontinued
145	3.E6	Aged families receiving Social Security benefits, by share of income from benefits and race, 2000
	3.E7	Discontinued
146	3.E8	Poverty guidelines for families of specified size, 1965–2002

## Old-Age, Survivors, and Disability Insurance

### Trust Funds

147	4.A1	Old-Age and Survivors Insurance, selected years 1937–2001
148	4.A2	Disability Insurance, 1957–2001
149	4.A3	Combined OASI and DI, 1957–2001
150	4.A4	Total annual benefits paid, by type of benefit and trust fund, and as a percentage of personal income, selected years 1937–2001
151	4.A5	Total annual benefits paid from OASI trust fund, by type of benefit, selected years 1937–2001
152	4.A6	Total annual benefits paid from DI trust fund, by type of benefit, 1957–2001

### Covered Workers

153	4.B1	Workers, earnings, and Social Security numbers issued, 1937–2001
154	4.B2	Number and amount of earnings for wage and salary and self-employed workers, 1951–2001
155	4.B3	Number of workers and median annual earnings, by type of worker and sex, selected years 1937–1999
156	4.B4	Percentage of all workers and self-employed workers with total annual earnings below annual maximum taxable, by sex, selected years 1937–1999
157	4.B5	Number of all workers, by age and sex, selected years 1937–1999
158	4.B6	Median earnings of all workers, by age and sex, selected years 1937–1999
159	4.B7	Number of wage and salary workers, by amount of taxable earnings and sex, 1992–1999
160	4.B8	Number of self-employed workers, by age and sex, selected years 1951–1999
161	4.B9	Number of self-employed workers, by amount of taxable earnings and sex, 1992–1999
162	4.B10	Number of workers, taxable earnings, and contributions, by type of employment and state or other area, 1999
163	4.B11	Number of workers, taxable earnings, and contributions, by type of employment, selected years 1937–2001

---

164 4.B12 Number of workers, taxable earnings, and contributions, by type of employment and state or other area, 1999

**Insured Workers**

165 4.C1 Estimated number, by insured status, December 31, 1940–2002

166 4.C2 Estimated number, by insured status, age, and sex, December 31, 1970–2002, selected years

4.C3 Discontinued

4.C4 Discontinued

168 4.C5 Estimated size of the population in the Social Security area and percentage fully insured, by age and sex, 1998–2002

169 4.C6 Period life table, 1999

**Benefits in Current-Payment Status**

170 5.A1 Number and average monthly benefit, by type of benefit and race, December 2001

171 5.A1.1 Number and average monthly benefit for retired workers, by race, age, and sex, December 2001

173 5.A1.2 Number and average monthly benefit for disabled workers, by race, age, and sex, December 2001

176 5.A1.3 Number and average monthly benefit for spouses, by race, sex, basis of entitlement, age and marital status, December 2001

179 5.A1.4 Number and average monthly benefit for children, by type of benefit, race and age, December 2001

182 5.A1.5 Number and average monthly benefit for widowed mothers and fathers, by race, age, sex, and marital status, December 2001

183 5.A1.6 Number and average monthly benefit for nondisabled widow(er)s, by race, age, sex, and marital status, December 2001

184 5.A1.7 Number and average monthly benefit for disabled widow(er)s, by race, age, sex, and marital status, December 2001

184 5.A1.8 Number and average monthly benefit for parents, by race, age, and sex, December 2001

5.A2 Discontinued

185 5.A3 Number and average monthly benefit, with reduction for early retirement, by type of benefit, race, age, and sex, December 2001

189 5.A4 Number and total monthly benefits, December 1940–2001, selected years

190 5.A5 Number and average age, by type of benefit, December 2001

190 5.A6 Number and average monthly benefit, by type of benefit, race, and sex, December 2001

191 5.A7 Number and average monthly benefit for women, by type of benefit and race, December 2001

191 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, December 2001

5.A9 Discontinued

192 5.A10 Number and average monthly benefit for beneficiaries aged 60 or older, by type of benefit, age, and sex, December 2001

5.A11 Discontinued

5.A12 Discontinued

5.A13 Discontinued

193 5.A14 Number and percentage distribution of women aged 62 or older, by type of benefit and dual entitlement status, December 1960–2001, selected years

193 5.A15 Number and average monthly benefit for women aged 65 or older, by age, type of benefit, and dual entitlement status, December 2001

194 5.A16 Number and average monthly benefit for adult beneficiaries, by type of benefit, sex, and age, December 2001

195 5.A17 Number and average benefit for disabled beneficiaries, by type of benefit, 1957–2001

**Retired Workers**

196 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 2001

197 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 2001

- 
- 198 5.B3 Number and average monthly benefit before and after delayed retirement credit, by age and sex, December 2001
  - 199 5.B4 Number, percentage, and average monthly benefit, by year of entitlement as retired worker and sex, December 2001
  - 200 5.B5 Number, average age, and percentage distribution, by age and sex, December 1940–2001, selected years
  - 201 5.B6 Number and percentage distribution with and without reduction for early retirement, by monthly benefit and sex, December 2001
  - 202 5.B7 Number and percentage distribution with and without reduction for early retirement, by primary insurance amount and sex, December 2001
  - 203 5.B8 Number and average monthly benefit with and without reduction for early retirement, by sex, December 1956–2001, selected years
  - 204 5.B9 Number and percentage distribution, by monthly benefit, age, and sex, December 2001

**Retired Workers and Dependents**

- 205 5.C1 Number and percentage distribution, by type of benefit and primary insurance amount, December 2001
- 206 5.C2 Average monthly benefit, by type of benefit and sex, December 1940–2001, selected years

**Disabled Workers**

- 207 5.D1 Number, percentage, and average monthly benefit, by year of entitlement as disabled worker and sex, December 2001
- 208 5.D2 Number and percentage distribution, by monthly benefit and sex, December 2001
- 208 5.D3 Number and monthly benefits, by sex, December 1957–2001, selected years
- 209 5.D4 Number, average age, and percentage distribution, by age and sex, December 1957–2001, selected years
- 210 5.D4.1 Number and percentage distribution of disabled beneficiaries, by type of beneficiary and diagnostic group, December 2001
- 211 5.D5 Number and percentage distribution, by diagnostic group, and sex, December 2001
- 212 5.D6 Number and percentage distribution, by diagnostic group, age, and sex, December 2001

**Disabled Workers and Dependents**

- 213 5.E1 Number and percentage distribution, by type of benefit and primary insurance amount, December 2001
- 213 5.E2 Average monthly benefit, by type of benefit, age, and sex, December 1957–2001, selected years

**Dependents and Survivors**

- 214 5.F1 Number of wives and husbands and total monthly benefits, by type of benefit, December 1950–2001, selected years
- 5.F2 Discontinued
- 215 5.F3 Number and percentage distribution of wives with entitlement based on age, by monthly benefit and age, December 2001
- 216 5.F4 Number of children and total monthly benefit, by type of benefit, December 1940–2001, selected years
- 5.F5 Discontinued
- 217 5.F6 Average monthly benefit for survivors, by type of benefit, December 1940–2001, selected years
- 218 5.F7 Number and percentage distribution of survivors, by type of benefit and primary insurance amount, December 2001
- 219 5.F8 Number of widow(er)s and total monthly benefit, by type of benefit, December 1950–2001
- 220 5.F9 Number, percentage, and average monthly benefit, by year of entitlement as nondisabled widow(er), December 2001
- 220 5.F10 Number, percentage, and average monthly benefit, by year of entitlement as disabled widow(er), December 2001
- 221 5.F11 Number and percentage distribution of nondisabled widows, by monthly benefit and age, December 2001
- 222 5.F12 Number of widowed mothers and fathers and total monthly benefit, by type of benefit, December 1950–2001, selected years

- 
- 223 5.F13 Number and average monthly benefit for nondisabled widows aged 65 or older, by reduction status and limitation of benefit, December 2001
- Retired Workers with Dual Entitlement**
- 224 5.G1 Number and percentage distribution of persons receiving both a retired-worker and secondary benefit without and with reduction for early retirement, by primary insurance amount and sex, December 2001
- 225 5.G2 Number receiving both a retired-worker and secondary benefit, by sex and type of secondary benefit, December 1952–2001
- 226 5.G3 Number receiving both a retired-worker and a secondary benefit and average monthly benefit, by type of secondary benefit, December 2001
- 226 5.G4 Number receiving both a retired-worker and a secondary benefit, average monthly benefit, and the retired-worker benefit as a percentage of both benefits, December 2001
- 227 5.G5 Number and percentage distribution, by total combined monthly benefit and retired-worker benefit, December 2001
- Beneficiary Families**
- 228 5.H1 Number and average monthly family benefit for selected family groups, December 1945–2001, selected years
- 229 5.H2 Number, average primary insurance amount, and average monthly family benefit for selected family groups, December 2001
- 230 5.H3 Number and percentage distribution of retired-worker and disabled-worker families, by monthly benefit for selected family groups, December 2001
- 231 5.H4 Number and percentage distribution of survivor families, by monthly benefit for selected family groups, December 2001
- Geographic Data**
- 232 5.J1 Estimated total benefits paid, by program and state or other area, 2001
- 233 5.J2 Number, by type of benefit and state or other area, December 2001
- 234 5.J3 Number and total monthly benefit for beneficiaries aged 65 or older, by sex and state or other area, December 2001
- 235 5.J4 Total monthly benefit, by type of benefit and state or other area, December 2001
- 236 5.J5 Number, by age and state or other area, December 2001
- 237 5.J5.1 Number, by race, sex, and state or other area, December 2001
- 238 5.J6 Average and median monthly benefit for retired workers and number and percentage distribution, by monthly benefit and state or other area, December 2001
- 5.J7 Discontinued
- 239 5.J8 Average and median monthly benefit for disabled workers and number and percentage distribution, by monthly benefit and state or other area, December 2001
- 240 5.J9 Average and median monthly benefit for nondisabled widow(er)s and number and percentage distribution, by monthly benefit and state or other area, December 2001
- 241 5.J10 Number of children, by type of benefit and state or other area, December 2001
- 242 5.J11 Number and total monthly benefit for beneficiaries in foreign countries, December 2001
- 243 5.J12 Number of disabled workers, by diagnostic group and state or other area, December 2001
- 244 5.J13 Number and percentage distribution of disabled workers, by diagnostic group and state or other area, December 2001
- 245 5.J14 Number, average and median monthly benefit, by type of disabled beneficiary and state or other area, December 2001
- Direct Deposit**
- 246 5.K1 Number and percentage of beneficiaries, and average monthly benefit, by direct deposit status and state or other area, December 2001
- Representative Payee**
- 247 5.L1 Number and percentage of beneficiaries with representative payee, by type of beneficiary and age, December 2001
-

---

## **International Agreements**

- 248 5.M1 Number of beneficiaries and average monthly benefit under U.S. totalization agreements, by country and type of benefit, December 1983–2001, selected years

### **Benefits Awarded, Withheld, and Terminated**

- 249 6.A1 Number, by type of benefit, 1940–2001  
250 6.A2 Average primary insurance amount for retired workers and average monthly benefit for retired and disabled workers, and nondisabled widows, by sex, selected years 1940–2001  
251 6.A3 Number and average monthly benefit, by type of benefit, race, age, and sex, 2001  
253 6.A4 Number and average monthly benefit for retired and disabled workers, by age and sex, 2001  
254 6.A5 Number and average monthly benefit with reduction for early retirement, by type of benefit, sex, and age, 2001  
255 6.A6 Number, percentage distribution, and average monthly benefit for retired and disabled workers, by state or other area, 2001

### **Retired Workers**

- 256 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 age and sex, 2001  
6.B2 Discontinued  
257 6.B3 Number and percentage distribution with and without reduction for early retirement, by monthly benefit and sex, 2001  
258 6.B4 Number and percentage distribution with and without reduction for early retirement, by primary insurance amount and sex, 2001  
259 6.B5 Number, average age, and percentage distribution, by age and sex, selected years 1940–2001

### **Disabled Workers**

- 260 6.C1 Number and percentage distribution, by monthly benefit and sex, 2001  
261 6.C2 Number, average age, and percentage distribution, by age and sex, selected years 1957–2001  
262 6.C3 Number and percentage distribution, by diagnostic group, age, and sex, 2001  
6.C4 Discontinued  
6.C5 Discontinued  
6.C6 Discontinued  
263 6.C7 Number of applications, awards, and ratio of awards to applications, and awards per 1,000 insured workers, selected years 1960–2001

### **Dependents and Survivors**

- 264 6.D1 Number of wives and husbands, by type of benefit, selected years 1950–2001  
6.D2 Discontinued  
265 6.D3 Number and average monthly benefit for wives and husbands, by age and sex, 2001  
266 6.D4 Number of children, by type of benefit, selected years 1957–2001  
268 6.D5 Number and average monthly benefit for children, by type of benefit and age, 2001  
269 6.D6 Number of mothers and fathers, by type of benefit, 1950–2001  
270 6.D7 Number and average monthly benefit for widow(er)s, by age and sex, 2001  
271 6.D8 Number of widow(er)s, by type of benefit, 1950–2001  
271 6.D9 Number and average amount of lump-sum death payment awards, 1940–2001

### **Benefits Withheld**

- 272 6.E1 Number and percentage distribution of retired workers with benefits withheld, by monthly benefit, reduction for early retirement, and sex, December 2001  
6.E2 Discontinued  
6.E3 Discontinued  
273 6.E4 Number of beneficiaries, with benefits withheld, by reason for withholding payment, type of benefit, and age, December 2001

---

273 6.E5 Number of wives, husbands, and children with benefits withheld, by reason for withholding payment and type of benefit, December 2001

**Benefits Terminated**

274 6.F1 Number of benefits terminated, by type, 1940–2001  
275 6.F2 Number, by reason for termination and type of benefit, 2001  
275 6.F3 Number of wives, husbands, and children, by reason for termination and type of benefit, 2001

**Supplemental Security Income**

276 7.A1 Number of persons receiving federally administered payments, total amount, and average monthly amount, by source of payment, eligibility category, and age, December 2001  
276 7.A2 Number of individuals and couples receiving federally administered payments, total amount, and average monthly amount, by source of payment and eligibility category, December 2001  
277 7.A3 Number of persons receiving payments, by source of payment and eligibility category, January 1974 and December 1975–2001, selected years  
278 7.A4 Total annual amount of payments, by source of payment and eligibility category, selected years 1974–2001  
279 7.A5 Average monthly amount, by source of payment and eligibility category, December 1975–2001, selected years  
7.A6 Discontinued  
7.A7 Discontinued  
280 7.A8 Number of federally administered awards, by eligibility category and age, 1974–2001  
281 7.A9 Number of persons receiving federally administered payments, by eligibility category and age, December 1974–2001

**State Data**

282 7.B1 Number of persons receiving federally administered payments and total annual amount, by eligibility category and state or other area, 2001  
283 7.B2 Number of persons receiving state-administered supplementation and total amount of payments, by eligibility category and state, 2001  
284 7.B3 Number of persons receiving federally administered payments and average monthly amount, by state or other area, December 2001  
7.B4 Discontinued  
7.B5 Discontinued  
7.B6 Discontinued  
285 7.B7 Total amount, federal payments, and state supplementation, by state or other area, 2001  
286 7.B8 Number of blind and disabled persons under age 18 receiving federally administered payments, by state or other area, December 2001  
287 7.B9 Number of federally administered awards, by eligibility category, age, and state or other area, 2001

**Benefit Distributions**

288 7.C1 Number and percentage distribution of adult individuals and persons under age 18 receiving federal SSI payments, by eligibility category and monthly amount, December 2001  
288 7.C2 Number and percentage distribution of couples receiving federal SSI payments, by eligibility category and monthly amount, December 2001

**Other Income Sources**

289 7.D1 Persons receiving both federally administered payments and other income, average monthly amount of income, by source of income, eligibility category, and age, December 2001  
290 7.D2 Percentage of persons receiving both federally administered payments and Social Security benefits, average monthly amount of benefits, by eligibility category, age, and state or other area, December 2001

**Recipient Characteristics**

7.E1 Discontinued

- 
- 291 7.E2 Number and percentage distribution of federally administered awards, by sex, age, and eligibility category, 2001
  - 292 7.E3 Number and percentage distribution of persons receiving federally administered payments, by sex, age, and eligibility category, December 2001
  - 293 7.E4 Number and percentage distribution of persons with representative payees receiving federally administered payments, by eligibility category and age, December 2001
  - 293 7.E5 Number and percentage distribution of persons receiving federally administered payments, by eligibility category, age, and living arrangement, December 2001
  - 293 7.E6 Number of noncitizens receiving federally administered payments as a percent of SSI recipients, by eligibility category, December 1982–2001, selected years

**Disability**

- 294 7.F1 Number and percentage distribution of blind and disabled persons under age 65 receiving federally administered payments and not transferred from prior state programs, by diagnostic group, December 2001
- 295 7.F2 Number and percentage distribution of blind and disabled persons under age 65 receiving federally administered payments, by diagnostic group, age, and sex, December 2001
- 296 7.F3 Number of persons receiving special Supplemental Security Income payments and extended Medicaid coverage, for selected months, 1982–2001
- 297 7.F4 Number of persons receiving special Supplemental Security Income payments and extended Medicaid coverage, by age, sex, types and amounts of earned and unearned income, December 2001
- 298 7.F5 Number of persons receiving special Supplemental Security Income payments and extended Medicaid coverage and average monthly earnings, by state or other area, December 2001

**Health Care Programs**

**Medicare**

**Trust Funds**

- 299 8.A1 Hospital Insurance, 1966–2001
- 300 8.A2 Supplementary Medical Insurance, 1966–2001

**Enrollment, Utilization, and Reimbursement**

- 301 8.B1 Hospital Insurance and Supplementary Medical Insurance: Aged persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1967–1998
- 302 8.B2 Hospital Insurance and Supplementary Medical Insurance: Disabled persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1974–1998
- 303 8.B3 Hospital Insurance and Supplementary Medical Insurance: Number of enrollees, by census division and state or other area, July 1, 1980–2001, selected years
- 305 8.B4 Hospital Insurance and Supplementary Medical Insurance: Number of persons aged 65 or older enrolled, by age, sex, and race, July 1, 1980–2001, selected years
- 306 8.B5 Hospital Insurance and Supplementary Medical Insurance: Number of disabled persons and persons with end stage renal disease under age 65 enrolled, by age, sex, and race, July 1, 1980–2001, selected years
- 8.B6 Discontinued
- 8.B7 Discontinued
- 307 8.B8 Hospital Insurance: Average covered charge per covered day of care in short-stay hospitals (1990–2001) and skilled nursing facilities (1975–2001), by census division and state or other area, selected years
- 309 8.B8.1 Hospital Insurance: Short-stay hospital discharges, by state or other area, selected fiscal years 1990–2001
- 310 8.B9 Supplementary Medical Insurance: Number of reimbursed bills, charges, and amount reimbursed, by type of service and type of beneficiary, 1993–2001
- 312 8.B10 Supplementary Medical Insurance: Claims received by carriers and assignment rates, 1969–2001
- 312 8.B11 Supplementary Medical Insurance: Reasonable charge determination for claims assigned and unassigned for aged and disabled persons, 1971–2001

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313 8.B12 Supplementary Medical Insurance: State buy-ins, by state or other area, selected years 1991–2002

**Participating Facilities**

314 8.C1 Hospital Insurance and Supplementary Medical Insurance: Number of facilities and beds, by participating providers, December 1967–2001, selected years

315 8.C2 Hospital Insurance: Number of participating hospitals and beds per 1,000 enrollees, by state or other area, December 2001

316 8.C3 Hospital Insurance and Supplementary Medical Insurance: Number of participating skilled nursing facilities, home health agencies, independent laboratories, and end stage renal disease facilities, by census division and state or other area, December 2001

**Medicaid**

**Recipients**

317 8.E1 Unduplicated number of recipients, total vendor payments, and average amounts, by type of medical service, selected fiscal years 1972–1998

318 8.E2 Unduplicated number of recipients, total vendor payments, and average amounts, by type of eligibility category, selected fiscal years 1972–1998

**State Data**

319 8.H1 Number of recipients, amount of payments, and average amount per recipient, by state or other area, fiscal year 1998

**Other Social Insurance and Veterans' Benefits**

**Unemployment Insurance**

9.A1 Discontinued

320 9.A2 Summary data on state programs, 2001

9.A3 Discontinued

**Workers' Compensation**

321 9.B1 Coverage, benefits, and costs, selected years 1940–2000

322 9.B2 Benefits, by state and federal program, 1997–2000

323 9.B3 Type of insurer and medical benefits, by state and federal program, 2000

**Temporary Disability Insurance**

324 9.C1 Selected data on state and railroad programs, 1999

**Black Lung Benefits**

325 9.D1 Currently payable to miners, widows, and dependents, December 1970–2001

326 9.D2 Currently payable to miners, widows, and dependents, by state or other area, June 2002

326 9.D3 Discontinued

**Veterans' Benefits**

327 9.F1 Number of payments, by type of payment and age, selected months and years, 1940–2001

**Public Assistance**

**Temporary Assistance for Needy Families/AFDC and Emergency Assistance**

328 9.G1 Average monthly number of families and recipients, total amount of cash assistance, and average monthly payment, selected years 1936–2001

329 9.G2 Average monthly number of families and recipients of Temporary Assistance for Needy Families and total amount of assistance, by state or other area, 2000



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330 9.G2 Average monthly number of families and recipients of Temporary Assistance for Needy Families and total amount of assistance, by state or other area, 2001

**Food Stamps**

331 9.H1 Number of persons participating, amount of benefits, and average benefit, fiscal years 1962–2001

**Low-Income Home Energy Assistance Program**

332 9.J1 Number of households receiving home energy assistance, by type of assistance and state, fiscal year 2000

333 9.J1.1 Number of households receiving home energy assistance, by type of assistance, fiscal years 1982–2000

334 9.J2 Low-Income Home Energy Assistance Program funds: Federal net allocations and amounts carried over, by state, fiscal year 2000

335 9.J2.1 Low-Income Home Energy Assistance Program funds: Federal net allocations and amounts carried over, fiscal years 1982–2000

336 9.J3 Estimated home emergency assistance obligations, by type of assistance, and state, fiscal year 2000

337 9.J3.1 Estimated home emergency assistance obligations, by type of assistance, fiscal years 1982–2000

**Adult Assistance**

9.K1 Discontinued

**General Assistance**

9.L1 Discontinued

**Appendix Tables**

339 A.1 Approximations of standard errors of estimated number of persons

340 A.2 Approximations of standard errors of estimated percentage of persons from 1 percent file

340 A.3 Approximations of standard errors of estimated percentage of persons from 10 percent file



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## Highlights and Trends

### Social Security (OASDI)

#### Employment and Earnings

Workers in OASDI covered employment, 2001	153.5 million
Average earnings, 2001	\$32,939
Earnings required in 2002 for—	
1 quarter of coverage	\$870
Maximum of 4 quarters of coverage	\$3,480
Earnings test exempt amounts for 2002	
Under full retirement age for entire year	\$11,280
For months before attainment of full retirement age in 2002	\$30,000
Beginning with month of attainment of full retirement age in 2002	Earnings test eliminated

#### Program Data

Cost-of-living adjustment for December 2001	2.6 percent
Average monthly benefit, December 2001	
Retired workers	\$874
Widows and widowers, nondisabled	\$841
Disabled workers	\$814
Number of beneficiaries, December 2001	
Old-Age, Survivors, and Disability Insurance	45.9 million
Old-Age Insurance	32.0 million
Retired workers	28.8 million
Survivors Insurance	6.9 million
Widows and widowers, nondisabled	4.6 million
Disability Insurance	6.9 million
Disabled workers	5.3 million
Benefit payments, 2001	
Old-Age, Survivors, and Disability Insurance	\$431.9 billion
Old-Age and Survivors Insurance	372.3 billion
Disability Insurance	59.6 billion
Administrative expenses, 2001	
Old-Age and Survivors Insurance	\$2.0 billion
As a percentage of total benefits paid	0.5 percent
Disability Insurance	\$1.7 billion
As a percentage of total benefits paid	2.9 percent

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## Social Security (OASDI)

### Program Trends

- In December 2001, 45.9 million persons were receiving Social Security benefits, an increase of 463,000 (1.0 percent) since December 2000. Seventy percent were retired workers and their spouses and children, and 15 percent were survivors of deceased workers. Fifteen percent were disabled workers and their spouses and children.
- Seventy-one percent of the 28.8 million retired workers received reduced benefits because of entitlement prior to full retirement age. Relatively more women (75 percent) than men (68 percent) received reduced benefits.
- The number of persons aged 65 or older receiving Social Security benefits rose from 31.7 million in 1996 to 32.9 million in 2001 (4.0 percent). Beneficiaries aged 85 or older increased at a greater rate during the 5-year period (11.5 percent) from 3,672,000 in 1996 to 4,095,000 in 2001. In 2001, 39,100 centenarians were receiving Social Security.
- More than 19 million women aged 65 or older were receiving benefits in December 2001. Seven million (36.8 percent) were entitled solely to a retired-worker benefit, and 5.6 million (29.2 percent) were dually entitled to a retired-worker benefit and a wife's or widow's benefit. About 6.5 million (34.0 percent) were receiving wife's or widow's benefits only.
- Almost 3 million children under age 18 were receiving benefits, including 1,346,000 children of deceased workers, 1,385,400 children of disabled workers, and 262,500 children of retired workers.
- In December 2001, 6,215,000 beneficiaries were receiving payments on the basis of disability—5,274,200 disabled workers, 736,500 disabled adult children, and 204,200 disabled widows and widowers. In addition, 156,900 spouses and 1,424,200 minor and student children of disabled workers were receiving benefits.
- The leading causes of disability for disabled workers were mental disorders other than mental retardation (28 percent), and musculoskeletal conditions (24 percent). About 10 percent had circulatory conditions and an additional 10 percent had diseases of the nervous system and sense organs.
- Average monthly benefits for December 2001, including the 2.6 percent COLA increase, were \$874 for retired workers, \$814 for disabled workers, and \$841 for nondisabled widows and widowers. Among retired workers, benefits averaged \$985 for men and \$756 for women. For disabled workers, average benefits were \$914 for men and \$688 for women.
- Average monthly family benefits for December 2001 were \$1,569 for a widowed mother or father and children; \$1,369 for a disabled worker, wife, and children; and \$1,712 for a retired worker, wife, and children.
- Total OASDI benefit payments for calendar year 2001 were \$431.9 billion. Payments from the OASI trust fund were \$372.3 billion—an increase of 5.6 percent from the \$352.7 billion paid in 2000.
- Benefit payments from the DI trust fund, from which benefits are paid to disabled workers, their spouses, and children, increased by 8.4 percent from \$55.0 billion in 2000 to \$59.6 billion in 2001.
- OASDI benefit awards in calendar year 2001 totaled 4,162,000, including 1,779,200 to retired workers, 425,200 to their spouses and children and 839,700 to survivors of insured workers. Benefits were awarded to 691,300 disabled workers and 426,500 of their spouses and children.

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## Supplemental Security Income

Federal benefit rate change, effective January 2002

Cost-of-living adjustment	2.6 percent
Monthly amount for—	
Individual living in his or her own household	\$545
Couple with both members eligible	\$817

### Program Data

Total	
Benefits paid in 2001	\$33.1 billion
Number of recipients, December 2001	6.8 million
Average benefit, December 2001	\$400.06
Federally administered payments	
Benefits paid in 2001	\$32.2 billion
Number of recipients, December 2001	6.7 million
Average benefit, December 2001	\$393.96
Federal SSI payments	
Benefits paid in 2001	\$28.7 billion
Number of recipients, December 2001	6.4 million
Average benefit, December 2001	\$366.31
Federally administered state supplementation	
Benefits paid in 2001	\$3.5 billion
Number of recipients, December 2001	<sup>1</sup> 2.5 million
Average benefit, December 2001	\$112.65
State-administered supplementation	
Benefits paid in 2001	\$0.9 billion
Number of recipients, December 2001	<sup>2</sup> 0.7 million
Average benefit, December 2001	\$109.03

<sup>1</sup> Includes 2.2 million persons receiving federal SSI and state supplementation and 0.3 million persons receiving state supplementation only.

<sup>2</sup> Includes 87,059 persons receiving state supplementation only.

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## Supplemental Security Income

### Program Trends

- In December 2001, 6,688,500 persons received federally administered SSI payments—86,800 more than the previous year. Of the total, 1,995,200 (30 percent) were aged 65 or older; 3,811,500 (57 percent) were blind or disabled aged 18-64; and 881,800 (13 percent) were blind or disabled under age 18.
- The number of blind or disabled aged 18-64 rose by 67,500 (1.8 percent) between December 2000 and December 2001, while the number under age 18 increased by 35,100 (4.1 percent).
- During 2001, 770,500 persons were awarded federally administered payments, a increase of 3.1 percent from the previous year. Of the 2001 awards, 502,800 went to blind or disabled recipients aged 18-64, 157,000 to those blind or disabled under age 18, and 110,800 to recipients aged 65 or older.
- Total SSI payments were \$33.1 billion in 2001, up 4.7 percent from 2000. Federal SSI payments in 2001 were \$28.7 billion (an increase of 5.2 percent over the previous year). Federally administered state supplementation totaled \$3.5 billion and state-administered supplementation \$895.0 million, increasing by 2.3 percent and 0.2 percent, respectively from the previous year's totals.
- In 2001, the leading causes of disability among the blind or disabled between the ages of 18 and 64, and those under age 18 were mental disorders and mental retardation. Among disabled recipients between the ages of 18 and 64, 25 percent had mental retardation as the primary diagnosis, and 35 percent were diagnosed with another mental disorder. These conditions were also the most frequent diagnoses for blind or disabled under age 18.

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## Health Care

### Medicare

Hospital Insurance (Part A)	
Total benefits paid in calendar year 2001	\$141.2 billion
Supplementary Medical Insurance (Part B)	
Total benefits paid in calendar year 2001	\$99.7 billion
Number of enrollees in July 2001, (one or both of Parts A and B)	40.0 million
Aged	34.4 million
Disabled	5.5 million
Administrative costs, 2001	
Hospital Insurance	\$2.2 billion
As a percentage of total benefits paid	1.6 percent
Supplementary Medical Insurance	\$1.7 billion
As a percentage of total benefits paid	1.7 percent

### Medicaid

Medical service expenditures in fiscal year 1998	\$142.3 billion
Number of unduplicated recipients, fiscal year 1998	40.7 million
Average 1998 vendor payment per unduplicated recipient	
Persons aged 65 or older	\$10,242
Permanently and totally disabled persons	\$9,095
Dependent children under age 21	\$1,203
Average 1998 vendor payment for medical services	
Nursing facility services	\$19,379
Inpatient general hospital care	\$5,031
Prescribed drugs	\$699
Physicians services	\$327

## Unemployment Insurance

2001		
Total payments		\$31.6 billion
Average—		
Weekly benefit amount (regular programs)		\$238
Duration of benefits		13.8 weeks
Weekly insured unemployment		3.0 million
Covered employment		127.9 billion

## Workers' Compensation

2000		
Benefit payments		
Total		\$45.9 billion
Compensation payments		25.9 billion
Medical and hospitalization		20.0 billion
Benefits paid by—		
Private insurance carriers		25.7 billion
State and federal funds		10.4 billion
Employers' self-insurance		9.8 billion
Covered workers per month		126.6 million
Costs as a percentage of covered payroll		1.25 percent

## Temporary Disability Insurance

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

	Average weekly benefit, 1999	
	State fund	Private plans
California*	\$234	\$396
New York	\$186	\$149

\*Accounts for half of the workers participating in TDI.

## Black Lung Benefits

Basic benefit, miner or widow	\$518.50
Maximum family benefit	\$1,037.00
Part B (claims filed before July 1, 1973)	
Number of monthly benefits to miners, widows, and dependents, December 2001	79,500
Total benefits paid, calendar year 2001	\$470.4 million
Part C (claims filed July 1, 1973 or later)	
Total benefits paid, fiscal year 2001	
Disability and survivors benefits	\$336.8 million
Medical benefits	\$60.1 million



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## Veterans' Benefits

Disability compensation or pension, 2001

Number of veterans with—	
Service-connected disability	2,321,000
Non-service-connected disability	348,000
Monthly payment in 2002 for—	
Service-connected disability	
10 percent disability	\$103
Total disability	\$2,163
Non-service-connected disability (maximum payment)	
Without dependent	\$796
With one dependent and in need of aid and attendance	\$1,575

## Temporary Assistance for Needy Families

Total payments, 2001	\$10.1 billion
Average monthly number of—	
Recipients	5.4 million
Families	2.1 million
Average monthly payment	
Per recipient	\$157
Per family	\$401

## Food Stamps

Monthly benefits, beginning October 1, 2002	
Four-person household with no income	\$465
Standard deduction (one-person to four-person households)	\$134
Fiscal year 2001	
Average number of participants	17.3 million
Total benefits	\$15.6 billion

## Low-Income Home Energy Assistance

In fiscal year 2000 the Department of Health and Human Services issued—

- \$1.06 billion in block grants to the 50 states and the District of Columbia;
- \$11.0 million in direct block grants to 128 Indian tribes and tribal organizations;
- \$1.5 million in block grants to the Commonwealth of Puerto Rico, Virgin Islands, America Samoa, Guam, and the Commonwealth of the Northern Mariana Islands; and
- \$20.6 million in leveraging incentive awards to 37 states, 29 tribes;
- \$5.5 million for Residential Emergency Assistance Challenge (REACH) program awards to 5 states; \$845,000 to 6 Indian tribes and tribal organizations;
- \$732 million in emergency contingency funds to 50 states and the District of Columbia, and \$12.3 million to 128 Indian tribes and tribal organizations.

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## Poverty

### 2001 weighted average poverty thresholds

Individual, aged 65 or older	\$8,494
Couple, householder aged 65 or older	\$10,715
Family of four	\$18,104

### Percentage of population with income below poverty level, 2000

All ages	11.3 percent
Children under age 18 living in families	15.7 percent
Persons aged 65 or older	10.2 percent

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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. Benefits are paid as an earned right to workers, their families and their survivors. There is no means test to qualify for benefits.

At the end of December 2001, 45.9 million people were receiving benefits at a rate exceeding \$36 billion each month (\$432 billion annually). According to the latest Social Security Trustees Report, these cash benefits comprised 4½ percent of the nation's gross domestic product. During the same year, approximately 153 million employees and self-employed workers, along with employers, contributed more than \$516 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 more than 90 percent of those 65 or older. It is the major source of income (providing 50 percent or more of total income) for 64 percent of the beneficiaries. It contributes 90 percent or more of income for almost one-third of the beneficiaries, and is the only source of income for 20 percent of them (see Charts 1–4 at the end of this section).

### Contributions and Trust Funds

A person contributes to Social Security either through 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, \$84,900 in 2002. There is no upper limit on taxable earnings for Medicare Hospital Insurance. Employees whose contributions 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 the Old-Age (Retirement) and Survivors Insurance (OASI), the Disability Insurance (DI), and the Hospital Insurance (HI) Trust Funds. In addition to the taxes on 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:

1. Monthly benefits for workers and their families.
2. Vocational rehabilitation services for disabled beneficiaries.
3. Administrative costs (currently less than 1 percent of expenditures).
4. The lump-sum death payment to eligible survivors.

Revenue received from FICA payments is transferred to the U.S. Treasury. FICA 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 and commissions studies and issues 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 is headquartered in Baltimore, Maryland. Major headquarter components include the National Computer Center that contains SSA's mainframe computers that drive our systems, much of the executive staff for policy, programs and systems as well as field support components. SSA's field structure is divided into 10 geographic regions containing over 1,300 field installations in communities throughout the country. 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. While 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. Seven program service centers provide service and support for the field offices in some aspects of Social Security's workloads.

**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**).

## Significant Program Changes

Program changes occur through legislation or (in areas where authority is delegated to the Commissioner) through regulation.

### Elimination of Annual Earnings Test for Persons Reaching Full Retirement Age

Public Law 106-182, The Senior Citizen's Freedom to Work Act of 2000, enacted April 7, 2000 eliminated the earnings test beginning with the month a beneficiary attains full retirement age (FRA). Elimination of this earnings test is effective for taxable years ending after December 31, 1999.

The earnings limit that applies in the year of attainment of FRA is based on the limits previously established for persons at FRA through age 69—\$25,000 in 2001, and \$30,000 in 2002. Benefits are withheld at the rate of \$1 for every \$3 of earnings above these exempt amounts. In determining earnings for purposes of the annual earnings test under this legislation, only earnings before the month of attainment of FRA will be considered. The legislation also permits retired workers to earn delayed retirement credits for any months between the attainment of full retirement age and age 70 for which the worker requests that benefits not be paid.

Public Law 106-182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year, which continued to be pegged to increases in the average wage. This amount increased from \$10,680 in 2001 to \$11,280 in 2002. Withholding for beneficiaries subject to this earnings test is at \$1 for each \$2 of earnings over the exempt amounts.

### Work Incentives Improvement Act

The Ticket to Work and Work Incentives Improvement Act, Public Law 106-170, was enacted on December 17, 1999. This legislation provides major enhancements to SSA's programs that assist disabled beneficiaries who attempt to return to work. It provides beneficiaries more choices in vocational rehabilitation services, and offers expanded health care for beneficiaries who are no longer eligible for cash benefits due to work. Effective October 1, 2000, the Act offers extended Medicare coverage to beneficiaries who return to work, and offers buy-in for Medicaid coverage.

The Ticket to Work provisions of this legislation are being phased in over a 3-year period that began January 1, 2001. The Ticket to Work will emphasize and encourage rehabilitation efforts and will reimburse private employment service providers for their services to beneficiaries attempting to return to work. These providers are called Employment Networks. Most disability beneficiaries will receive a Ticket that they may use to obtain vocational rehabilitation, job training, or other support services.

Individuals may take their ticket to any of the Employment Networks that offer services in their communities. By the end of 2002, SSA expects to have distributed tickets to beneficiaries in 33 states and the District of Columbia. In 2003, tickets will be distributed in the remaining 17 states, American Samoa, Guam, the Northern Mariana Islands, Puerto Rico, and the Virgin Islands. Also beginning January 1, 2001, former beneficiaries may have their benefits resumed if their work activity ends within 5 years of the month their benefits stopped and they are still disabled.

### Regulatory Increases in Substantial Gainful Activity and in Trial Work Period Amounts

Effective July 1, 1999, the Social Security Administration raised from \$500 to \$700 the amount of monthly earnings for a nonblind disabled individual to be considered engaging in substantial gainful activity (SGA). Effective January 1, 2001, the top SGA level was raised to \$740 per month, with the provision that ongoing SGA levels will be automatically adjusted annually based on increases in the national average wage index. Effective January 1, 2002, the level is \$780 per month.

The SGA threshold is part of the definition of disability that requires an individual to be unable to engage in substantial gainful activity to be eligible for benefits. Earnings of more than the top SGA level will ordinarily demonstrate that an individual is engaged in SGA. Earnings of less than \$780 per month will ordinarily demonstrate that an individual is not engaged in SGA.

A different definition of SGA applies to blind persons receiving Social Security disability benefits. Increases in the SGA amount for blind individuals have long been pegged to increases in the national average wage index and thus were not affected by the 1999 or subsequent rule changes. The level for blind individuals increased from \$1,240 in 2001 to \$1,300 in 2002.

New rules also affect the trial work period (TWP). The TWP allows disability beneficiaries to test their ability to work for at least 9 months. During the TWP, beneficiaries may earn any amount and still receive full benefits. The monthly level at which earnings count toward the 9-month TWP was raised from \$200 to \$530 effective January 1, 2001, with future increases pegged to the national average wage index. Effective January 1, 2002, the level is \$560. After completion of 9 trial work months, the SGA level is used to determine whether earnings are substantial or not. If earnings fall below the SGA level, full benefits generally continue. If earnings are higher than the SGA level, cash benefits are usually suspended while medical benefits continue.

**Table 2.A30** provides related historical data on disability program earnings guidelines, including reference to recent changes in thresholds for determining SGA.

## Coverage and Financing

In 2001, about 153 million persons worked in employment or self-employment 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 American workforce are 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 2002, a domestic employee must earn \$1,300 from any single employer in a calendar year before FICA is withheld. Most election workers must earn \$1,200 in 2002 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 each pay taxes on earnings in covered employment and self-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—\$84,900 in 2002—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.

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 persons.

A self-employed person pays the combined employee-employer rate of 12.4 percent for OASDI and 2.9 for HI under the Self-Employment Contributions Act (SECA). 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, times 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

To become eligible for his or her benefit and benefits for family members or survivors, a worker must earn a minimum number of credits based on work in covered employment or self-employment. These credits are described as quarters of coverage. In 2002, a quarter of coverage (QC) is credited for each \$870 in annual covered earnings, up to a maximum of four QCs for the year. Earnings of \$3,480 or more in 2002 will give the worker four QCs regardless of when the money is actually earned or 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 age 21 (or 1950 if later) and the year in which he or she reaches age 62, becomes disabled, or dies—whichever occurs first. Under this requirement, workers who reach age 62 in 1991 or later need the maximum number of 40 QCs to be fully insured. 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 the worker is disabled or dies. A minimum of 6 QCs is required regardless of age.

**Currently Insured**

If a worker dies before achieving fully insured status, benefits can still be paid to qualified survivors if the worker was "currently insured" at the time of death. (In the case of a young worker, survivors benefits are potentially payable to a worker's children and to a widow(er) with children in care.) To be currently insured, the worker must have earned 6 QCs in the 12 quarters before death (that is, 6 of the last 13 quarters, including the quarter in which death occurred).

**Disability Insured**

To qualify for disability benefits, a nonblind worker must have recent work activity as well as being fully insured. Under the test involving recent work experience, a nonblind worker older than age 31 must have earned at least 20 QCs among the 40 calendar quarters ending with the quarter in which the disability began. Workers disabled at ages 24 through 30 must have earned QCs in one-half of the calendar quarters elapsing between age 21 and the calendar quarter in which the disability began. Workers under age 24 need 6 QCs in the 12-quarter period ending with the quarter of disability onset. Workers who qualify for benefits based on blindness need only be fully insured.

**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 20 countries.

**Social Security Agreements and Effective Dates**

Australia .....	2002	Italy .....	1978
Austria .....	1991	Korea .....	2001
Belgium .....	1984	Luxembourg .....	1993
Canada .....	1984	Netherlands .....	1990
Chile .....	2001	Norway .....	1984
Finland .....	1992	Portugal .....	1989
France .....	1988	Spain .....	1988
Germany .....	1979	Sweden .....	1987
Greece .....	1994	Switzerland .....	1980
Ireland .....	1993	United Kingdom .....	1985

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 based on totalized credits.

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

**Benefit Computation and Automatic Adjustment Provisions**

The primary insurance amount (PIA) is the monthly benefit amount payable to the worker upon retirement at full retirement age or upon entitlement to disability benefits. The PIA is also the base figure from which monthly benefit amounts payable to the worker's family members or survivors are determined. The PIA is derived from the worker's annual taxable earnings, 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 but instead 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 in 1989–2002. **Table 2.A9** shows indexed earnings for workers first eligible in 1995–2002 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 period used to calculate AIME equals the number of full calendar years elapsing between age 21 (or 1950, if later) and the year of first eligibility, usually excluding the lowest 5 years. Workers disabled before age 47 have from zero to 4 excluded years from the computation. At an absolute minimum, 2 years are used to compute AIME. 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. **Tables 2.A15** and **2.A16** describe AMW benefit computations based on the worker's nonindexed earnings after 1936 and 1950, respectively. (Very few persons currently being awarded benefits have PIAs computed under these old-start or new-start computation methods. These methods, particularly the new-start method shown in Table 2.A16, are 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 2002, the formula provides a PIA equal to the sum of:

- 90 percent of the first \$592 of AIME, plus
- 32 percent of the next \$2,975 of AIME, plus
- 15 percent of AIME over \$3,567.

Beginning with the first year of eligibility, the PIA is increased by cost-of-living adjustments (COLAs).

**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 benefit formula applicable to a worker depends on the year of eligibility (or death) rather than on the year benefits are first received. Thus the PIA of a worker retiring at age 65 in 2002 is calculated using the benefit formula that applies to all workers first eligible in 1999 (the "year of attainment" of age 62). The PIA derived from that formula is then increased by the COLAs effective for December, 1999, 2000, and 2001 to obtain the PIA effective at age 65. 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, based on the year of attainment.

Beginning in 1981, benefits have been rounded to the next lower ten cents at each step in the computation. The final benefit payment is rounded to the next lower dollar amount (if not already an even dollar). Prior to 1981, benefits were paid in ten-cent increments after rounding up to the next dime in each computation step.

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 (COLAs).

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

*Windfall Elimination Provision (WEP).* The WEP affects persons who receive a pension based on noncovered work after 1956 and Social Security benefits. First eligibility for the noncovered pension and Social Security benefits must be after December 31, 1985 for WEP to apply. WEP reduces the Social Security PIA upon which SSA benefits are based and affects all benefits paid on that record, except 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 never more than one-half of the noncovered pension.

A WEP PIA is generally based on 40 percent of the first bend point instead of 90 percent as with the regular PIA:

Example: A retired worker with a noncovered pension of \$2,000 a month and less than 20 years of covered employment attains age 62 in 2002.

Normal PIA, based on AIME of \$800.

$$\$592 \times .90 = \$532.80$$

$$\$208 \times .32 = \$66.56$$

$$\text{PIA} = \$599.30$$

WEP PIA, based on AIME of \$800.

$$\$592 \times .40 = \$236.80$$

$$\$208 \times .32 = \$66.56$$

$$\text{PIA} = \$303.30$$

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 normal 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 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 85 percent of AIME (or 100 percent of PIA, if larger) or 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, with the first incremental increase affecting workers who reached age 62 in the year 2000. Workers over age 62 who retire before FRA can receive reduced benefits. The monthly rate of reduction from the full retirement benefit (that is, the PIA) is 5/9 of 1 percent a month for the first 36 months immediately preceding FRA. The reduction rate is 5/12 of 1 percent a month for any additional months. The maximum overall reduction for early retirement will have risen from 20 percent to 30 percent by 2022, when age 67 becomes the full retirement age.

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 workers who postpone their retirement beyond the full retirement age, benefits are increased for each month of nonpayment beyond that age and age 70. This increase is called a "delayed retirement credit," and is potentially available for any or all months following attainment of the full retirement age (maximum of 60 months for persons who attained age 65 prior to 2003). The annual rate of increase for delayed retirement credits is 7 percent for workers who reach age 62 in 2001 and 2002, and will eventually rise to 8 percent for workers reaching age 62 in 2005 or later.

### 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 the full retirement age 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 have risen from 25 percent to 35 percent by 2022, when age 67 becomes the full retirement age (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 a child under the age of 18, a child aged 18–19 attending elementary or secondary school full time, or to an adult child, aged 18 or older, who was disabled prior to age 22. In addition, young spouses (that is, those under the age of 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 a child under age 16, or to an adult child of the worker who was disabled prior to 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 age 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 if the ex-spouse could be entitled if he or she applied.

### Survivors Benefits

Widows and widowers of fully insured workers are eligible for unreduced benefits at full retirement age (FRA), currently age 65. As with retired workers and spouses, widow(er)s' FRA will gradually increase to age 67. 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 benefit retirement age is over 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 retirement beyond the FRA. In these cases, the survivor benefits include any delayed retirement credits the deceased worker had 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 ages 50–60 receive the age 60 widow's rate (71.5 percent of PIA) regardless of their age at the time of entitlement.

Children of deceased workers and mothers and fathers under FRA are eligible to receive monthly benefits up to 75 percent of the worker's PIA if the worker died either fully or currently insured. Mothers and fathers must be caring for the worker's entitled child who is either under age 16 or disabled. A dependent parent aged 62 or older is eligible for monthly benefits equal to 82.5 percent of the worker's PIA. Each of two dependent parents can qualify for benefits

equal to 75 percent of the deceased worker's PIA. Monthly benefits payable to survivors are reduced to conform to the family maximum benefit payable on the deceased worker's account. Benefits for a surviving divorced spouse, however, are disregarded when computing the maximum family benefit.

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** (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 number of persons is not available, but is estimated to be less than 100,000.

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, will consist of two components.

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, have at least 5 years of railroad service after December 31, 1995. The two components are unchanged:

- Tier 1. A basic Social Security level component equivalent to what would be paid under the Social Security Act on the basis of the employee's combined railroad and nonrailroad service, reduced by the amount of any monthly benefit under OASDI actually paid on the basis of nonrailroad work; and

- Tier 2. A "private pension" component payable over and above the Social Security equivalent, calculated on the basis of the number of years of railroad service.

### Effect of Current Earnings on Benefits

Beneficiaries under the full retirement age (FRA) with earnings in excess of certain exempt amounts may have all or part of their benefits withheld as a result of the annual earnings test (AET) provisions of the Social Security Act. For those at or above FRA, however, there have been recent changes to AET provisions. Amendments in 1996 eased the impact of AET provisions, while changes in 2000 removed the AET altogether for beneficiaries aged 65 or older. Public Law 104-121, enacted March 29, 1996, substantially raised the exempt amounts under the annual earnings test for persons who have reached full retirement age. These amounts are \$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. Benefits are withheld at the rate of \$1 in benefits for every \$3 of earnings above the FRA exempt amount.

Public Law 106-182, enacted April 7, 2000, eliminated the earnings test beginning with the month a beneficiary reaches FRA. The annual earnings test that applies in the year one attains FRA is based on the more generous annual limits established under P.L. 104-121 (including the \$1 for \$3 withholding rate). After 2002, the annual exempt amount will be indexed to the growth in average wages. In determining annual earnings for purposes of the annual earnings test, only earnings before the month of attainment of FRA will be counted.

Public Laws 104-121 and 106-182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year. This annual amount continues to be pegged to increases in average wages. The amount was \$10,680 in 2001, and is \$11,280 in 2002. When the annual earnings limit affects working beneficiaries under FRA, benefits are withheld at the rate of \$1 for every \$2 of earnings above the exempt amount.

Individuals have the option to receive reduced 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 retirement, because in that year 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 over an amount equal to 1/12 of the annual earnings limit. The monthly earnings test is applied to the self-employed based on hours they work instead of monthly earnings. Generally, beneficiaries are eligible for the monthly earnings test in only one year.

**Table 2.A29** provides historical detail on the retirement test.

Beneficiaries entitled on the basis of their own disability—disabled workers, disabled adult children, and disabled widow(er)s—are not subject to the earnings test. Substantial earnings by disabled beneficiaries, however, may indicate that they are able to do work which constitutes substantial gainful activity (SGA) and are therefore no longer disabled. Although other factors are considered, numerical earnings thresholds are used in a determination of SGA.

**Table 2.A30** provides historical thresholds for determining substantial gainful activity (SGA).

**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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### 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 one-half of Social Security and Tier 1 Railroad Retirement benefits.

For married beneficiaries filing jointly with adjusted gross income under \$32,000 a year, no Social Security benefits are subject to taxation. If adjusted gross income exceeds \$32,000 but is under \$44,000, the amount of benefits included in gross income is the lesser of one-half of income over \$32,000. If a couple's adjusted gross income exceeds \$44,000, the amount of benefits included in gross income is 85 percent of income over \$44,000 plus the lesser of \$6,000 or one-half of benefits. However, no more than 85 percent of benefits are subject to income tax. The income thresholds for single beneficiaries are \$25,000 and \$32,000.

If members of a married couple are filing separately, they do not have a minimum threshold if they lived together any time during the tax year. The amount of benefits included in gross income is the lesser of 85 percent of Social Security or Tier 1 Railroad Retirement benefits, or 85 percent of all income as defined above. Like all matters dealing with tax liability, taxation of Social Security benefits fall under the jurisdiction of the Internal Revenue Service.

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## Supplemental Security Income

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 2002 federal SSI benefit rate for an individual living in his or her own household and with no other countable income is \$545 monthly; for a couple (with both husband and wife eligible), the SSI benefit rate is \$817 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) recipients under age 18 whose private health insurance is making payments to the institution. 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 \$365 in federal SSI payments:

$$\$545 - (\$200 - \$20) = (\$545 - \$180) = \$365.$$

A person whose income consists of \$500 in gross monthly earnings would receive \$337.50 in federal SSI payments:

$$\$545 - ((\$500 - \$85) / 2) = \$207.50 \text{ countable earnings} \\ \text{FBR } \$545 - \$207.50 = \$337.50 \text{ federal SSI}$$

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 of reasonable value. 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

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Act

### 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.

**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>a</sup>

## **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 “Deeming of Income and Resources” on page 30 for subsequent changes to sponsor-to-alien deeming provisions.)

**1989**

*Public Law 101-239,  
enacted December 19*

SSI eligibility is continued for a disabled or blind child who was receiving SSI benefits while living in the United States and is now living with a parent who is a member of the U.S. armed forces assigned to permanent duty ashore outside the United States, but not where the parent is stationed in Puerto Rico or the territories and possessions of the United States.

**1993**

*Public Law 103-66,  
enacted August 10*

Above provision made applicable where the parent is a member of the U.S. armed forces and stationed in Puerto Rico or the territories and possessions of the United States.

**1996**

*Public Law 104-193,  
enacted August 22*

Prohibits SSI eligibility for anyone who is not a U.S. citizen or national 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.

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<sup>a</sup> 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 making false or misleading statements regarding material facts.

*Public Law 104-208,  
enacted September 30*

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

**1997**

*Public Law 105-18,  
enacted June 12*

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

*Public Law 105-33,  
enacted August 5*

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

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

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

**1998**

*Public Law 105-306,  
enacted October 28*

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

**2000**

*Public Law 106-386,  
enacted October 28*

Noncitizens, regardless of their immigration status, may be eligible for SSI to the same extent as refugees, if they are determined to be victims of “severe forms of trafficking in persons.”

**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 require-

ments for 12 consecutive months shall not be eligible for payments; however, this does not prevent such individuals from reapplying and again becoming eligible for payments.

SSI disability payments based on DA&A are also limited to a total of 36 benefit months (beginning March 1995) regardless of whether appropriate treatment is available. Months for which benefits are not due and received do not count 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 \$57 (indexed to 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, developmental and rehabilitative services to disabled or blind children.

Reimbursement for the cost of rehabilitation services will be made if the services result in the recipient's return to work.

**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*

Provision for continuation of payments to SSI recipients who have medically recovered while enrolled in an approved vocational rehabilitation program extended to 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>b</sup> status (for a reason other than cessation of disability or blindness), or
- Federally administered state supplementation was received.

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<sup>b</sup> Recipients who have lost eligibility for SSI benefits for fewer than 13 consecutive months are in suspended payment status.

Extends the provision providing for benefit continuation to SSI recipients who medically recover while participating in a state VR program to include SSI recipients participating in a non-state VR program.

**1999**

*Public Law 106-170,  
enacted December 17*

Establishes a Ticket to Work and Self-Sufficiency program which 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 of their choice.

**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 childhood 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 childhood 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 which 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 childhood 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 childhood disability recipient whose continuing eligibility is being reviewed to present evidence that the recipient is receiving treatment which 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 due to 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 noncitizen has been battered or subjected to extreme cruelty by family members.

## Federal Benefit Payments

### Federal Benefit Rates

Basic benefit standards are used in computing the amount of federal SSI payments. Benefit levels differ for individuals and couples living in households and for persons in Medicaid institutions. Individuals or couples living in their own households receive the full federal benefit. If an individual or couple is living in another person's household and receiving support and

maintenance there, the federal benefit is reduced by one-third. The federal benefit rates for persons in households are increased annually to reflect increases in the cost of living. Legislation affecting the level of federal benefit rates since the inception of the SSI program are summarized in table 2.B1.

**Windfall Offset**

**1980**  
*Public Law 96-265, enacted June 9*  
Offset (by reduction of retroactive Social Security benefits) to prevent persons whose initial OASDI payment is retroactive from receiving more in total benefits for the same period 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.

**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 made a statement or representation of material fact for use in determining eligibility for benefits that the individual knew, or should have known, was false or misleading or omitted a material fact.

**Exclusions from Income**

**General Exclusions**

**1972**

*Public Law 92-603,  
enacted October 30*

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

**1981**

*Public Law 97-35,  
enacted August 13*

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

**2000**

*Public Law 106-554,  
enacted December 21*

Earnings of persons defined as Social Security statutory employees are treated as self-employment income for SSI purposes.

**Special Exclusions**

**1972**

*Public Law 92-603,  
enacted October 30*

Any amount of tax rebate issued to an individual by any public agency that is based on either real property or food purchase taxes.

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

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

Work expenses of blind persons.

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

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

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

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

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

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

**1976**

*Public Law 94-331,  
enacted June 30*

Disaster assistance from income for 9 months and application of one-third reduction for 6 months for certain victims of disasters occurring between January 1, 1976 and December 31, 1976.

*Public Law 94-566,  
enacted October 20*

Any assistance based on need (including vendor payments) made to or on behalf of SSI recipients, which is paid and wholly funded by state or local governments.

The value of assistance provided under certain federal housing programs.

**1977**

*Public Law 95-113,  
enacted September 29*

Food stamps, federally donated food, and the value of free or reduced price food for women and children under the Child Nutrition Act and National School Lunch Act.

*Public Law 95-171,  
enacted November 12*

Provisions 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.

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 the interest on the funds to be excluded from income if retained in the fund.

**1988**

*Public Law 100-383,  
enacted August 10*

Restitution payments made to Japanese internees and relocated Aleutians.

**1989**

*Public Law 101-239,  
enacted December 19*

Interest on agreements representing the purchase of an excluded burial space.

Payments from the Agent Orange Settlement.

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

**1990**

*Public Law 101-508,  
enacted November 5*

Earned income tax credit (including the child health insurance portion).

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

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

Payments received as state or local government relocation assistance.

Payments received under the Radiation Exposure Compensation Act.

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

**1993**

*Public Law 103-66,  
enacted August 10*

Hostile fire pay to members of the uniformed services.

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

**1994**

*Public Law 103-286,  
enacted August 1*

Payments to victims of Nazi persecution.

**1998**

*Public Law 105-285,  
enacted October 27*

Funds made available to an SSI recipient by a state or local government or a nonprofit organization as part of the Individual Development Account demonstration project.

## SSI: History of Provisions

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*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.

## 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 which could be used for the benefit of the individual or spouse.

## General Exclusions

### 1972

*Public Law 92-603,  
enacted October 30*

A home of reasonable value—established *by regulation* as not exceeding a fair-market value of \$25,000 (\$35,000 in Alaska and Hawaii).

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

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

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

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

### 1976

*Public Law 94-569,  
enacted October 20*

The recipient's home, regardless of value, is excluded from consideration in determining resources.

### 1977

*Public Law 95-171,  
enacted November 12*

Assistance received under the Disaster Relief and Emergency Assistance Act of 1974 for 9 months following receipt.



- 1979** Reasonable value for an automobile increased *by regulation* to \$4,500 of current-market value; personal goods and household effects increased to \$2,000 of equity value.
- 1982**  
*Public Law 97-248, enacted September 3* The value, within prescribed limits, of a burial space for the recipient, spouse, and immediate family is excluded. In addition, \$1,500 each (less the value of already excluded life insurance and any amount in an irrevocable burial arrangement) may be set aside for the burial of the recipient and spouse, if held in separately identifiable burial funds and if inclusion of any of the burial funds in countable resources would cause the resource limit to be exceeded.
- 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 due to 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).  
  
Allows the exclusion of burial funds, as described above, regardless of whether or not counting any portion of those funds would result in excess resources.
- 1988**  
*Public Law 100-707, enacted November 23* Removes the time limit for exclusion of disaster assistance.
- 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.

## SSI: History of Provisions

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<b>1990</b> <i>Public Law 101-508, enacted November 5</i>	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.
<b>1993</b> <i>Public Law 103-66, enacted August 10</i>	Makes permanent the 9-month exclusion of payments received as state or local government relocation assistance.
<b>1994</b> <i>Public Law 103-286, enacted August 1</i>	Payments to victims of Nazi persecution.
<b>1996</b> <i>Public Law 104-193, enacted August 22</i>	Dedicated financial institution accounts required to be established for large past-due benefits for disabled individuals under age 18 with a representative payee.
<b>1998</b> <i>Public Law 105-285, enacted October 27</i> <i>Public Law 105-306, enacted October 28</i>	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. 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.
<i>Public Law 105-369, enacted November 12</i>	Payments made under the Ricky Ray Hemophilia Relief Fund Act of 1998.
<b>2000</b> <i>Public Law 106-554, enacted December 21</i>	Funds deposited by an individual in an Individual Development Account and the interest on those funds.
<b>2001</b> <i>Public Law 107-16, enacted June 7</i>	The refundable child tax credit in the month of receipt and in the following month.
<b>Transfer-of-Assets Penalties</b>	
<b>1980</b> <i>Public Law 96-611, enacted December 28</i>	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.
<b>1988</b> <i>Public Law 100-360, enacted July 1</i>	Removes the transfer-of-assets penalty for transfers made July 1, 1988, or later.
<b>1999</b> <i>Public Law 106-169, enacted December 14</i>	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 prior to the first month of eligibility. These advance payments are recouped by proportional reductions in the recipient's first 6 months of SSI benefits.

### Interim Assistance Reimbursement

**1974**

*Public Law 93-368,  
enacted August 7*

SSA may enter into agreements with the states to repay them directly for assistance payments made to an SSI applicant while his/her claim is being adjudicated. The repayment is made from the first check due to the individual. This legislation expires June 30, 1976.

**1976**

*Public Law 94-365,  
enacted July 14*

The authority to repay the state for interim assistance is made permanent.

**1987**

*Public Law 100-203,  
enacted December 22*

Extends interim assistance reimbursement to situations in which payments are made by states or political subdivisions to persons whose SSI payments were suspended or terminated and who subsequently are found to be eligible for such benefits. Also clarifies that the payment from which the interim assistance reimbursement is paid must be the first payment of benefits relating to the interim period.

## Medicaid Eligibility

- 1972**  
*Public Law 92-603, enacted October 30*
- States can provide Medicaid coverage to all recipients of SSI payments. Alternatively, they can limit coverage by applying more restrictive criteria from the state Medicaid plan in effect on January 1, 1972.
- States can accept SSA determination of eligibility, or make their own determination.
- 1976**  
*Public Law 94-566, enacted October 20*
- Preserves the Medicaid eligibility of recipients who become ineligible for cash SSI payments due to the cost-of-living increases in Social Security benefits.
- 1980**  
*Public Law 96-265, enacted June 9*
- Blind or disabled recipients under age 65 no longer eligible for either regular or special SSI payments because of their earnings may retain SSI recipient status for Medicaid eligibility purposes under the following conditions: (1) they continue to have the disabling impairment, (2) they meet all nondisability eligibility criteria except for earned income, (3) they would be seriously inhibited from continuing employment without Medicaid services, and (4) their earnings are insufficient to provide a reasonable equivalent of SSI payments and Medicaid.
- In states that do not provide Medicaid coverage categorically to all SSI recipients, qualification for Medicaid benefits depends on the state's specific eligibility and program requirements.
- The Medicaid provision of the 1980 legislation was in effect from January 1, 1981, through December 31, 1983. Under a 1-year demonstration project, beginning January 1, 1984, this provision was continued for persons already eligible for regular or special SSI payments or for retention of Medicaid eligibility.
- 1984**  
*Public Law 98-460, enacted October 9*
- Medicaid provision of 1980 legislation extended through June 30, 1987 (retroactive to January 1, 1984).
- 1986**  
*Public Law 99-272, enacted April 7*
- Restores Medicaid eligibility for some disabled widow(er)s who became ineligible for SSI when their title II benefits increased in 1984 because of a change in the Social Security disabled widow(er)s benefits reduction factor.
- 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.

**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 OAA, AB, and APTD expenditures for calendar year 1972, is provided to states electing federal administration of their supplementary plans. This provision applies only to supplementary payments that do not, on the average, exceed a state’s “adjusted payment level.” (The adjusted payment level is the average of the payments that individuals with no other income received in January 1972; it may include the bonus value of food stamps. Adjustments are provided for payments that had been below state standards.)

**1973**

*Public Law 93-66,  
enacted July 9*

Provision is made 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) his/her 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.

## SSI: History of Provisions

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- 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 which has an agreement with SSA to administer its supplementation payments, must remit both payments and fees prior to the SSI payment date.
- 2000**  
*Public Law 106-554,*  
*enacted December 21*
- Changes the effective date of above provision from 2009 to 2001.

### Overpayment Recovery

- 1984**  
*Public Law 98-369,*  
*enacted July 18*
- Limits the rate of recovering overpayments from monthly payments to the lesser of: (1) the monthly payment, or (2) 10 percent of a recipient’s monthly income. Permits a higher or lower adjustment at the request of the recipient subject to the agreement of the Commissioner. The limit does not apply if fraud, willful misrepresentation, or concealment of material information was involved on the part of the recipient or spouse in connection with the overpayment.  
Waives recovery of certain overpayments due to amount of excess resources of \$50 or less.  
Provides temporary authority for the recovery of overpayments from tax refunds.
- 1988**  
*Public Law 100-485,*  
*enacted October 13*
- Grants permanent authority to recover overpayments from tax refunds.

**1998**

*Public Law 105-306,  
enacted October 28*

Authorizes SSA to collect SSI overpayments by offsetting Social Security benefits, with a maximum monthly offset of no more than 10 percent of the Social Security benefit.

**1999**

*Public Law 106-169,  
enacted December 14*

Makes representative payees liable for an SSI overpayment caused by a payment made to a recipient who has died, and requires SSA to establish an overpayment control record under the representative payee's Social Security number.

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

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

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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 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.*

### 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 age 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 non-covered aged persons who elect to pay a premium for Medicare coverage. The Medicare, Medicaid, and SCHIP Benefits Improvement and Protection Act of 2000 (Public Law 106-554) allowed persons with Amyotrophic Lateral Sclerosis (Lou Gehrig’s Disease) to waive the 24-month waiting period.

Medicare has traditionally consisted of two parts: Hospital Insurance (HI), also known as Part A, and Supplementary Medical Insurance (SMI), also known as Part B. A new, third part of Medicare, sometimes known as Part C, is the Medicare+Choice program, which was established by the Balanced Budget Act (BBA) of 1997 (Public Law 105-33) and which expanded beneficiaries’ options for participation in private-sector health care plans. When Medicare began on July 1, 1966, approximately 19 million people enrolled. In 2002, over 40 million people are enrolled in one or both of Parts A and B of the Medicare program, and 5 million of them have chosen to participate in a Medicare+Choice plan.

### Coverage

HI is generally provided automatically, and free of premiums, to persons age 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 Medi-

care-only coverage in federal, state, or local government employment are eligible beginning at age 65. Similarly, individuals who have been entitled to Social Security or Railroad Retirement disability benefits for at least 24 months, and government employees with Medicare-only coverage who have been disabled for more than 29 months, are entitled to HI benefits. HI 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 2001, the HI program provided protection against the costs of hospital and specific other medical care to almost 40 million people (34 million aged and 6 million disabled enrollees). HI benefit payments totaled \$141.2 billion in 2001.

The following health care services are covered under Medicare’s HI program:

- Inpatient hospital care coverage includes costs of a semi-private 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 (LTC) 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 HI 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 but 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 21–100. HI 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 both HI and SMI. The BBA transferred from HI to SMI those home health services furnished on or after January 1, 1998 that are unassociated with a hospital or skilled nursing facility stay. HI will continue to cover the first 100 visits following a 3-day hospital stay or a skilled nursing facility stay; SMI covers any visits thereafter. Home health care under HI and SMI has no copayment and no deductible.

HHA care, including care provided by a home health aide, may be furnished part-time by a HHA in the residence of a home-bound 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, though beneficiaries must pay a 20-percent coinsurance for DME, as required under SMI 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 HI 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 HI 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 61–90. If a beneficiary exhausts the 90 days of inpatient hospital care available in a benefit period, he or she can elect to use days of Medicare coverage from a non-renewable "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) age 65 or older, and all disabled persons entitled to coverage under HI, are eligible to enroll in the SMI program on a voluntary basis by payment of a monthly premium. Almost all persons entitled to HI choose to enroll in SMI. In 2001, the SMI program provided protection against the costs of physician and other medical services to almost 38 million people (33 million aged and 5 million disabled). SMI benefits totaled \$99.7 billion in 2001.

The SMI program covers the following services and supplies:

- 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 skilled nursing facility), physician assistants, and nurse

practitioners and clinical nurse specialists in collaboration with a physician.

- Services in an emergency room or outpatient clinic, including same-day surgery, and ambulance services.
- Home health care not covered under HI.
- Laboratory tests, X-rays, and other diagnostic radiology services, as well as certain preventive care screening tests.
- Ambulatory surgical center services in a Medicare-approved facility.
- Most physical and occupational therapy and speech pathology services.
- Comprehensive outpatient rehabilitation facility services, and mental health care in a partial hospitalization psychiatric program, if a physician certifies that inpatient treatment would be required without it.
- Radiation therapy, renal (kidney) dialysis and transplants, heart, lung, heart-lung, liver, pancreas, and bone marrow transplants, and, as of April 2001, intestinal transplants.
- Approved durable medical equipment for home use, such as oxygen equipment and wheelchairs, prosthetic devices, and surgical dressings, splints, and casts.
- Drugs and biologicals that cannot be self-administered, such as hepatitis B vaccines and immunosuppressive drugs (certain self-administered anticancer drugs are covered).

To be covered, all services must be either medically necessary or one of several prescribed preventive benefits. SMI 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 after 2002 in settings other than hospitals), and higher cost-sharing requirements (such as those for outpatient treatments for mental illness).

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

Medicare+Choice (Part C) is an expanded set of options for the delivery of health care under Medicare. While all Medicare beneficiaries can receive their benefits through the original fee-for-service (FFS) program, most beneficiaries enrolled in both HI and SMI can choose to participate in a Medicare+Choice plan instead. Organiza-

tions that seek to contract as Medicare+Choice plans must meet specific organizational, financial, and other requirements. Following are the primary Medicare+Choice 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.
- Private, unrestricted FFS 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.
- Medical savings account (MSA) plans, which provide benefits after a single high deductible is met. Medicare makes an annual deposit to the MSA, and the beneficiary is expected to use the money in the MSA to pay for medical expenses below the annual deductible.

Except for MSA plans, all Medicare+Choice 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. There are some restrictions as to who may elect an MSA plan, even when enrollment is no longer limited to a certain number of participants.

### **Program Financing, Beneficiary Liabilities, and Provider Payments**

All financial operations for Medicare are handled through two trust funds, one for the HI program and one for the SMI program. 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 program is financed primarily through a mandatory payroll tax. Almost all employees and self-employed workers in the United States work in employment covered by the HI program and pay taxes to support the cost of benefits for aged and disabled beneficiaries. The HI 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 HI tax rate is specified in the Social Security Act and cannot be changed without legislation.

The HI trust fund 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 HI coverage to certain aged persons who retired when the HI program 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 program is financed through premium payments (\$58.70 per beneficiary per month in 2003) and contributions from the general fund of the U.S. Treasury. Beneficiary premiums are generally set at a level that covers 25 percent of the average expenditures for aged beneficiaries. Therefore, the contributions from the general fund of the U.S. Treasury are the largest source of SMI income. The SMI trust fund also receives income from interest earnings on its invested assets, as well as a small amount of miscellaneous income. Beneficiary premiums and general fund payments are redetermined annually, to match estimated program costs for the following year.

Capitation payments to Medicare+Choice plans are financed from the HI and SMI trust funds in proportion to the relative weights of HI and SMI 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 both HI and SMI. 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 (BC/BS) and various commercial health insurance companies.

For beneficiaries enrolled in Medicare+Choice 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 pay the

monthly Part B premium and may, depending on the plan, pay an additional plan premium.

For hospital care covered under HI, a fee-for-service beneficiary's payment share includes a one-time deductible amount at the beginning of each benefit period (\$840 in 2003). 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 (\$210 per day in 2003) are required through the 90<sup>th</sup> day of a benefit period. Each HI 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 (\$420 per day in 2003) are required.

For skilled nursing care covered under HI, Medicare fully covers the first 20 days of SNF care in a benefit period. But for days 21–100, a copayment (\$105 per day in 2003) is required from the beneficiary. After 100 days of SNF care per benefit period, Medicare pays nothing for SNF care. Home health care has no deductible or coinsurance payment by the beneficiary. In any HI service, the beneficiary is responsible for fees to cover the first 3 pints or units of non-replaced 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 the HI program. Eligibility is generally earned through the work experience of the beneficiary or of his or her spouse. However, most aged people who are otherwise ineligible for premium-free HI coverage can enroll voluntarily by paying a monthly premium, if they also enroll in SMI. For people with fewer than 30 quarters of coverage as defined by SSA, the 2003 HI monthly premium rate is \$316; for those with 30 to 39 quarters of coverage, the rate is reduced to \$174. Voluntary coverage upon payment of the HI premium, with or without enrolling in SMI, is also available to disabled individuals for whom cash benefits have ceased due to earnings in excess of those allowed for receiving cash benefits.

For SMI, the beneficiary's payment share includes the following: one annual deductible (currently \$100); the monthly premiums; the coinsurance payments for SMI services (usually 20 percent of the medically allowed charges); a deductible for blood; certain charges above the Medicare-allowed charge (for claims not on assignment); and payment for any services that are not covered by Medicare. For outpatient mental health treatment services, the beneficiary is liable for 50 percent of the approved charges.

### Provider Payments

For HI, 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 PPS, a specific predetermined amount is paid for each inpatient hospital stay, based on each stay's diagnosis-related group (DRG) classification. In some cases the payment the hospital receives is less than the hospital's actual cost for providing the HI-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. Payments for skilled nursing care and home health care are made under separate prospective payment systems. Payments for inpatient rehabilitation and psychiatric care are currently reimbursed on a reasonable cost basis, but prospective payment systems are expected to be implemented in the near future, as required by the BBA.

For SMI, 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 were 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). Payments for 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 HI.

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 payments to Medicare+Choice plans are based on a blend of local and national capitated rates, generally determined by the capitation payment methodology described in section 1853 of the Social Security Act. Actual payments to plans vary based on demographic characteristics of the enrolled population. New "risk adjusters" based on demographics and health status are currently being phased in to better match Medicare capitation payments to the expected costs of individual beneficiaries.

### Claims Processing

Medicare's HI and SMI 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 HI claims for institutional services, including inpatient hospital claims, SNFs, HHAs, and hospice services. They also process outpatient hospital claims for SMI. Examples of intermediaries are BC/BS (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.
- Assisting both providers and beneficiaries as needed.

Medicare carriers handle SMI claims for services by physicians and medical suppliers. Examples of carriers are the BS 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.
- Making payments to physicians and suppliers for services that are covered under SMI.

Peer review organizations (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. PROs 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. Prior to this 1996 legislation, 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

Department of Health and Human Services has the overall responsibility for administration of the Medicare program. Within DHHS, responsibility for administering Medicare rests with CMS. SSA assists, however, by initially determining an individual's Medicare entitlement, by withholding Part B premiums from the Social Security benefit checks of beneficiaries, and by maintaining Medicare data on the master beneficiary record, which is SSA's primary record of beneficiaries. The Internal Revenue Service in the Department of the Treasury collects the HI payroll taxes from workers and their employers.

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. The Board of Trustees reports to Congress on the financial and actuarial status of the Medicare trust funds on or about the first day of April each year.

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 2001, HI covered about 40 million enrollees with benefit payments of \$141.2 billion, and SMI covered about 38 million enrollees with benefit payments of \$99.7 billion. Administrative costs were about 2 percent of HI and about 2 percent of SMI disbursements for 2001. Total disbursements for Medicare in 2001 were \$241 billion.

*Note: Medicare enrollment data are based on estimates prepared for the 2002 annual report of the Medicare Board of Trustees to Congress (available on the Internet at [www.cms.hhs.gov/publications/trusteesreport/](http://www.cms.hhs.gov/publications/trusteesreport/)). Medicare benefits, administrative costs, and total disbursements for 2001 are actual amounts for the calendar year, as reported by the Department of the Treasury.*

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## Medicare: History of Provisions

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*Note: These summaries of public law were selected based on general interest and are not intended to include or explain fully all of the provisions and exclusions of the Medicare program.*

Act \*

### Insured Status

#### Entitlement to Hospital Insurance Benefits

<b>1965</b>	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.
<b>1967</b>	3 QC for each year after 1966 and before attainment of age 65.
<b>1972</b>	<p>Disabled individual, under age 65, entitled to disability benefits for 24 consecutive months under the Social Security or Railroad Retirement program (excludes spouses and children of disabled individuals). Individual under age 65 who has end stage renal disease (ESRD) and who is either fully or currently insured, or is entitled to monthly benefits under the Social Security or Railroad Retirement program or is the spouse or dependent child of such an insured individual or beneficiary. Entitlement begins on the first day of the third month following the initiation of a course of renal dialysis and ends with the 12th month following the month in which either the dialysis terminates or the individual has a renal transplant.</p> <p>Individual aged 65 or older enrolled in the SMI program who is not otherwise entitled to HI benefits, upon voluntary participation with payment of Hospital Insurance premium.</p>
<b>1980</b>	<p>Individual who would be entitled to monthly benefits under the Social Security or Railroad Retirement program if application were made.</p> <p>Disabled individual under age 65 entitled to disability benefits for at least 24 months, not necessarily consecutive, under the Social Security or Railroad Retirement program.</p> <p>Medicare 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.</p> <p>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).</p>
<b>1982</b>	Federal employees covered under HI based on QC for earnings as federal employees and/or based on deemed QC for earnings as federal employees before 1983.
<b>1983</b>	Employees of nonprofit organizations, effective Jan. 1, 1984.
<b>1986</b>	Mandatory coverage for state and local government employees not covered under Social Security and hired after Mar. 31, 1986.
<b>1987</b>	Second waiting period eliminated if a former disabled beneficiary becomes entitled again (no time limit).
<b>1989</b>	Disabled individuals under age 65 who are no longer entitled to Social Security disability benefits because their earnings exceeded the substantial gainful activity level have the option to purchase Medicare coverage by paying the HI and SMI premiums.
<b>2000</b>	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.

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\* Act refers to legislation enacted in the year shown.

**Entitlement to Supplementary Medical Insurance 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 SMI premium.
- 1972** Individual under age 65 entitled to HI benefits, upon voluntary participation with payment of SMI premium.

**Medicare Benefits**

**HI and SMI**

- 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 due to end stage renal disease (ESRD) for up to 12 months.
- 1982** For workers and their spouses aged 65-69, 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 HHS must certify the prospective payment mechanism for HMOs before implementation.
- 1984** Medicare secondary payer provisions are extended to spouses aged 65-69 of workers under age 65 whose employer-based group health plan covers such spouses.  
For HMOs, includes medical and other health services furnished by clinical psychologists.
- 1985** Provides payment for liver transplant services.
- 1986** Extends the working age secondary payer provision to cover workers and their spouses beyond age 69.  
For HMOs that offered organ transplants as a basic health service on Apr. 15, 1985, such services may be offered from Oct. 1, 1985, through Apr. 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 1987-1991.
- 1987** Requires HMOs/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 in order 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 due to ESRD for up to 18 months (extended from 12 months), effective Feb. 1, 1991, to Jan. 1, 1996.  
The secondary payer provision for disabled beneficiaries covered under large employer plans (see 1986.); effective through Sept. 30, 1995.
- 1993** The secondary payer provision for disabled beneficiaries covered under large employer plans is effective through Sept. 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 Sept. 30, 1998.

**1997** Established an expanded set of options for the delivery of health care under Medicare, referred to as Medicare+Choice. 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.

The provision making Medicare the secondary payer for disabled beneficiaries covered under large employer plans, previously scheduled to expire Sept. 30, 1998, made permanent.

The provision making Medicare secondary payer for the first 12 months of entitlement due to ESRD, which had been extended on a temporary basis (through Sept. 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.

#### Hospital Insurance

**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 Nov. 1, 1983, to Oct. 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.

## Medicare: History of Provisions

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- 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 in order 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 Jan. 1, 1989.
- 1989** The spell of illness and benefit period coverage of laws prior to 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.
- 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 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 Jan. 1, 2000; and (2) colorectal screening procedures, including fecal-occult blood tests and flexible sigmoidoscopies, for beneficiaries age 50 or older, colonoscopy for beneficiaries at high risk for colorectal cancer, and other procedures, including screening barium enemas under certain circumstances.



<b>2000</b>	<p>The homebound benefit 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.</p> <p>Effective July 1, 2001, 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. The entitlement to Medicare begins with the first month of the Social Security Administration's determination of eligibility for Disability Insurance benefits.</p> <p>There were no changes in 2001 affecting beneficiaries.</p> <p><b>Supplementary Medical Insurance</b></p>
<b>1965</b>	<p>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.</p> <p>Beginning in 1966, the beneficiary pays a \$50 deductible, with a 3-month carryover provision.</p>
<b>1967</b>	<p>Outpatient hospital diagnostic services transferred from HI. Includes physical therapy services in a facility. Purchase of durable medical equipment.</p>
<b>1972</b>	<p>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.</p> <p>Beginning in 1973, the beneficiary pays a \$60 deductible.</p>
<b>1977</b>	<p>Services in rural health clinics.</p>
<b>1980</b>	<p>Home health services. Deductible applicable to home health services is eliminated, effective July 1, 1981.</p> <p>Facility costs of certain surgical procedures performed in freestanding ambulatory surgical centers.</p> <p>Increase in annual limit for outpatient therapy from \$100 to \$500.</p> <p>Recognizes comprehensive outpatient rehabilitation facilities as Medicare providers.</p>
<b>1981</b>	<p>Beginning in 1982, the beneficiary pays a \$75 deductible, with the carryover provision eliminated.</p>
<b>1984</b>	<p>Hepatitis B and pneumococcal vaccines and blood clotting factors and necessary supplies are included as Part B benefits. Debridement of mycotic toenails is limited.</p> <p>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.</p>
<b>1986</b>	<p>Includes vision care services furnished by an optometrist.</p> <p>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.</p> <p>Includes outpatient (in addition to previously covered inpatient) immunosuppressive drugs for 1 year after covered transplant.</p> <p>Includes occupational therapy services provided in certain delivery settings.</p>

## Medicare: History of Provisions

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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/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/clarified to include prescription drugs used in immunosuppressive therapy.

Specifies in law that in order 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 Jan. 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 prior to Jan. 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 age 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 Jan. 1, 2000; (4) colorectal screening procedures, including fecal-occult blood tests and flexible sigmoidoscopies, for beneficiaries aged 50 or older, colonoscopy for beneficiaries at high risk for colorectal cancer, and other procedures, including screening barium enemas under certain circumstances; (5) diabetes outpatient self-management training in nonhospital-based programs (previously covered in hospital-based programs only) and blood glucose monitors and testing strips for all diabetics (previously provided for insulin-dependent diabetics only), effective July 1, 1998; (6) procedures to identify bone mass, detect bone loss, or determine bone quality for certain qualified beneficiaries, at frequencies determined by the Secretary of HHS, 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 HHS 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 less 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 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 Jan. 1, 2002.

Screening colonoscopies are covered for all beneficiaries, not just 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 Jan. 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 HHS 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 benefits 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 benefit 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.

Effective July 1, 2001, 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. The entitlement to Medicare begins with the first month of the Social Security Administration's determination of eligibility for Disability Insurance benefits.

There were no changes in 2001 affecting beneficiaries.

### **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 SMI program, an amount equal to participant premiums.
- 1972** For cost of SMI 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).

#### **Participant Premiums**

See also Table 2.C1.

- 1965** SMI enrollee premium rate (originally \$3 per month) to be established annually such as to pay one-half of program costs.
- 1972** SMI 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** SMI enrollee premiums for July 1983, to Dec. 31, 1983, frozen at premium level of June 30, 1983. Premiums for Jan. 1, 1984, to Dec. 31, 1985, set to cover 25 percent of aged program costs.
- 1984** SMI enrollee premiums for Jan. 1, 1986, to Dec. 31, 1987, will be set to cover 25 percent of aged program costs. Increases in the SMI premium may not exceed the dollar amount of the Social Security cost-of-living adjustment.  
For calculating the amount of SMI premium surcharge for individuals from age 65 up to age 70 not previously enrolled in SMI, 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 SMI premiums be set to cover 25 percent of aged program costs and that increases in the SMI 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 SMI 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 SMI 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 SMI premiums be set to cover 25 percent of aged program costs.
- 1990** The SMI premium are \$29.90 in 1991; \$31.80 in 1992; \$36.60 in 1993; \$41.10 in 1994; and \$46.10 in 1995.
- 1993** SMI enrollee premiums for Jan. 1, 1996, to Dec. 31, 1998, will be set to cover 25 percent of aged program costs.
- 1997** The SMI premium is permanently set at 25 percent of program costs.

**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.

**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 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.*

### Overview

Title XIX of the Social Security Act is a federal/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 (1) establishes its own eligibility standards; (2) determines the type, amount, duration, and scope of services; (3) sets the rate of payment for services; and (4) 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 and/or services during the year.

### Basis of Eligibility and Maintenance Assistance Status

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 those within these groups; their 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 Med-

icaid 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:

- Individuals 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, or—at state option—more liberal criteria.
- Children under age 6 whose family income is at or below 133 percent of the federal poverty level (FPL).
- Pregnant women whose family income is below 133 percent of the FPL (services to these women are limited to those related to pregnancy, complications of pregnancy, delivery, and postpartum care).
- Supplemental Security Income (SSI) recipients in most states (some states use more restrictive Medicaid eligibility requirements that pre-date SSI).
- Recipients of adoption or foster care assistance under Title IV of the Social Security Act.
- Special protected groups (typically individuals who lose their cash assistance due to earnings from work or from increased Social Security benefits, but who may keep Medicaid for a period of time).
- All children born after September 30, 1983 who are under age 19, in families with incomes at or below the FPL.
- Certain Medicare beneficiaries (described later).

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

- Infants up to age 1 and pregnant women not covered under the mandatory rules whose family income is no more than 185 percent of the FPL (the percentage amount is set by each state).
- Children under age 21 who meet 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 waivers.
- Certain aged, blind, or disabled adults who have incomes above those requiring mandatory coverage, but below the FPL.
- 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.
- TB-infected persons who would be financially eligible for Medicaid at the SSI income level if they were within a Medicaid-covered category (however, coverage is limited to TB-related ambulatory services and TB 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) of 1997 (Public Law 105-33).
- “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; that is, children under age 19 and pregnant women who are medically needy must be covered, and prenatal and delivery care for pregnant women, as well as ambulatory care for children, must be provided. A state may elect to provide MN eligibility to certain additional groups and may elect to provide certain additional services within its MN program. As of August 2002, thirty-six states 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 impacted 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. Medicaid coverage for most aliens entering before that date and coverage for those eligible after the 5-year ban are state options; 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 can continue only if these persons can be covered for Medicaid 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 is not expected to be significant. Under welfare reform, persons who would have been eligible for AFDC under the AFDC requirements in effect on July 16, 1996 generally will still be eligible for Medicaid. Although most persons covered by TANF will receive Medicaid, it is not required by law.

Title XXI of the Social Security Act, known as the state Children’s Health Insurance Program (SCHIP), is a new program initiated by the BBA. 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 coverage may begin as early as the third month prior to application—if the person would have been eligible for Medicaid had he or she applied during that time. Medicaid coverage generally stops at the end of the month

in which a person no longer meets the criteria of any Medicaid eligibility group. The BBA allows states to provide 12 months of continuous Medicaid coverage (without reevaluation) for eligible children under 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. Those with higher incomes may pay a sliding scale premium based on income.

### Scope of Medicaid Services

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

- Inpatient hospital services.
- Outpatient hospital services.
- Prenatal care.
- 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.
- Early and periodic screening, diagnostic, and treatment (EPSDT) services for children under age 21.

States may also receive federal matching funds to provide certain *optional* services. Following are the most common of the 34 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 age 21.
- Transportation services.
- Rehabilitation and physical therapy services.
- Home and community-based care to certain persons with chronic impairments.

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 or 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 preventative, rehabilitative, curative, and supportive care. This care, provided in day health centers, homes, hospitals, and nursing homes, helps the person maintain independence, dignity, and quality of life. PACE functions within the Medicare program as well. Regardless of source of payment, PACE providers receive payment only through the PACE agreement and must make available all items and services covered under both Titles XVIII and XIX, without amount, duration, or scope limitations and without application of any deductibles, copayments, or other cost sharing. The individuals enrolled in PACE receive benefits solely through the PACE program.

### Amount and Duration of Medicaid Services

Within broad federal guidelines and certain limitations, states determine the amount and duration of services offered under their Medicaid programs. States may limit, for example, the number of days of hospital care or the number of physician visits covered. Two restrictions apply: (1) limits must result in a sufficient level of services to reasonably achieve the purpose of the benefits; and (2) limits on benefits may not discriminate among beneficiaries based on medical diagnosis or condition.

In general, states are required to provide comparable amounts, duration, and scope of services to all categorically needy and categorically related eligible persons. There are two important exceptions: (1) Medically necessary health care services that are identified under the EPSDT program for eligible children, and that are within the scope of mandatory or optional services under federal law, must be covered even if those services are not included as part of the covered services in that state's Plan; and (2) states may request "waivers" to pay for otherwise uncovered home and community-based services (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 participating providers of health care and to receive quality care that is appropriate and timely.

### Payment for Medicaid Services

Medicaid operates as a vendor payment program. States may pay health care providers directly on a fee-for-service basis, or states may pay for Medicaid services



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

States may impose nominal deductibles, coinsurance, or copayments on some Medicaid beneficiaries for certain services. The following Medicaid beneficiaries, however, must be excluded from cost sharing: pregnant women, children under age 18, and hospital or nursing home patients who are expected to contribute most of their income to institutional care. In addition, all Medicaid beneficiaries must be exempt from copayments for emergency services and family planning services.

The federal government pays a share of the medical assistance expenditures under each state’s Medicaid program. That share, known as the Federal Medical Assistance Percentage (FMAP), is determined annually by a formula that compares the state’s average per capita income level with the national income average. States with a higher per capita income level are reimbursed a smaller share of their costs. By law, the FMAP cannot be lower than 50 percent or higher than 83 percent. In 2002, the FMAPs varied from 50 percent in eleven states to 76.09 percent in Mississippi, and averaged 57 percent overall. The BBA also permanently raised the FMAP for the District of Columbia from 50 percent to 70 percent and raised the FMAP for Alaska from 50 percent to 59.8 percent through 2000. The BIPA of 2000 further adjusted Alaska’s FMAP to a higher level for 2001–2005. The federal government pays states a higher share for children covered through the SCHIP program. This “enhanced” FMAP averages about 70 percent for all states, compared to the general Medicaid average of 57 percent.

The federal government also reimburses states for 100 percent of the cost of services provided through facilities of the Indian Health Service, provides financial help to the twelve states that furnish the highest number of emergency services to undocumented aliens, 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 Qualifying Individuals (QI) program (described later), 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. The Medicare, Medicaid, and SCHIP Balanced Budget Refinement Act of 1999 (as incorporated into Public Law 106-113, the appropriations bill for the District of Columbia for fiscal year 2000) increased the amount that certain states and the territories can spend on DSH and SCHIP payments, respectively. The BIPA set upper payment limits for inpatient and outpatient services provided by certain types of facilities.

## 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, 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 the earlier economic recession. In recent years Medicaid enrollment has declined somewhat.
- 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.
- The increase in payment rates to providers of health care services, when compared to 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 1999 (excluding Hawaii), for example, indicate that Medicaid payments for services for 20.5 million children, who constitute 51 percent of all Medicaid beneficiaries, average about \$1,170 per child (a relatively small average expenditure per person). Similarly, for 8.4 million adults, who comprise 20 percent of beneficiaries, payments average about \$1,935 per person. However, certain other specific groups have much larger per-person expenditures. Medicaid payments for services for 4.1 million aged, constituting 10 percent of all Medicaid beneficiaries, average about \$10,335 per person; for 7.3 million disabled, who comprise 18 percent of beneficiaries, payments average about \$9,000 per person. When expenditures for these high- and lower-cost beneficiaries are combined, the 1999 payments to health care vendors for 40 million Medicaid beneficiaries average \$3,825 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 40 percent of the total cost of care for persons using nursing facility or home health services in 2000. National data for 1999 (excluding Hawaii) show that Medicaid payments for nursing facility services (excluding ICFs/MR) totaled \$33.1 billion for more than 1.6 million beneficiaries of these services—an average expenditure of \$20,690 per nursing home beneficiary. The national data also show that Medicaid payments for home health services totaled \$2.9 billion for more than 800,000 beneficiaries—an average expenditure of \$3,625 per home health care beneficiary. With the percentage of our population who are elderly or disabled increasing faster than that of the younger groups, the need for long-term care is expected to increase.

Another significant development in Medicaid is the growth in managed care as an alternative service delivery concept different from the traditional fee-for-service system. Under managed care systems, HMOs, prepaid health plans (PHPs), or comparable entities agree to provide a specific set of services to Medicaid enrollees, usually in return for a predetermined periodic payment per enrollee. Managed care programs seek to enhance access to quality care in a cost-effective manner. Waivers may provide the states with greater flexibility in the design and implementa-

tion 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 statewide health care reform experimental demonstrations to cover uninsured populations and to test new delivery systems without increasing costs. Finally, the BBA provided states a new option to use managed care. The number of Medicaid beneficiaries enrolled in some form of managed care program is growing rapidly, from 14 percent of enrollees in 1993 to 57 percent in 2001.

More than 40 million persons received health care services through the Medicaid program in fiscal year (FY) 1999 (the last year for which beneficiary data are available). In FY 2001, total outlays for the Medicaid program (federal and state) were \$227.8 billion, including direct payment to providers of \$162.6 billion, payments for various premiums (for HMOs, Medicare, etc.) of \$37.6 billion, payments to disproportionate share hospitals of \$15.9 billion, and administrative costs of \$11.7 billion. Outlays under the SCHIP program in FY 2001 were \$3.8 billion. With no changes to either program, expenditures under Medicaid and SCHIP are projected to reach \$394 billion and \$7.2 billion, respectively, by FY 2007.

### 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 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) and Supplementary Medical Insurance (SMI) 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 SMI 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 HI and SMI coverage. If these persons have incomes below 200 percent of the FPL but do not meet any other Medicaid assistance category, they may qualify to have Medicaid pay their HI premiums as Qualified Disabled and Working Individuals (QDWIs).

For Medicare beneficiaries with incomes that are above 120 percent and less than 175 percent of the FPL, the BBA establishes a capped allocation to states, for each of the 5 years beginning January 1998, for payment of all or some of the Medicare SMI premiums. These beneficiaries are known as Qualifying Individuals (QIs). Unlike 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 payment of this QI benefit is 100 percent federally funded, up to the state's allocation.

When all these categories are taken into account, Medicaid is estimated to provide some level of supplemental health coverage for about 6.5 million Medicare beneficiaries.

*Note: Medicaid data are based on the projections of the Mid-Session Review of the President's Fiscal Year 2003 Budget and are consistent with data received from the states on the Forms HCFA-2082, HCFA-37, and HCFA-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 insured 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 assure 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 Bene-

fits), 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.

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 which is recognized as eligible for federal assistance because of their status as Indians. The same permissible exclusion from coverage that are applicable to other governmental entities also apply 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-service-members 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 be responsible for their own unemployment.

### 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.

Three-fourths of the 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 35 jurisdictions, the maximum is adjusted automatically in accordance with the weekly wages of covered employees.

Twelve states provide additional allowances for certain dependents. They all include children under ages 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 \$24 or less per week and, in the majority of states, the amount is the same for each dependent.

All but 12 states require a waiting period of 1 week of total unemployment before benefits can begin. Four 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 (EB) 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 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

## Unemployment Insurance

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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.

Prior to the 1992 legislation, the EB 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 unemployment—insurance covered employment in that state. By definition, the IUR does not include workers who have exhausted their benefits but are still unemployed.

The 1992 legislation (P.L. 102-318) provided states 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) where 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 April 13, 2002, extended Benefits were payable for 13 weeks in Alaska, Idaho, Oregon, and Washington.

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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's 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 1920, all but seven 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 has its 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 on the basis of a diagnosis of pneumoconiosis.

The Energy Employees Occupational Illness Compensation Program Act of 2000 instituted a new program that covers employees, contractors, and sub-contractors of the U.S. Department of Energy (DOE) for exposure to beryllium and the contraction of chronic beryllium disease. In addition, employees of private companies providing beryllium to DOE are covered. Employees' survivors also receive cash benefits.

This same act also covers employees disabled or killed by cancers that developed after beginning employment at a DOE or an atomic weapons facility, as long as the cancer was at least "as likely as not" related to this employment, subject to a number of guidelines relating to radiation exposure, type of cancer, and other relevant factors. It also provides benefits for silica-related diseases and to uranium miners and their survivors who have received lump-sum payments under the Radiation Exposure Compensation Act, and establishes an Office of Worker Advocacy in the Department of Energy to deal with other claims of work-related occupational disease.

### Coverage

In 2000, state and federal workers' compensation laws covered about 123.7 million employees. Covered payroll in 2000—that is, total wages paid to covered workers—was \$4.3 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.

Two other major groups outside the coverage of workers' compensation laws are railroad employees engaged in interstate commerce and seamen in the U.S. Merchant Marine. Those 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 they retain the right to bring tort suits against their employers for negligence in the case of work-related injuries or illness.

The programs are compulsory for most private employment, except in Texas, where it is elective. If Texas employers reject it, they lose the customary common-law defenses against suits by employees in private industry.

### Benefits

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

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

### Temporary and Permanent Total Disability

A large majority of compensation cases involving cash payments involve temporary total disability. That is, employees are unable to work at all while they are recovering from the injury but they are expected to recover. 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 generally being set at some percentage of the states average weekly wage, ranging from 66-2/3 percent to 200 percent, but typically 100 percent.

## Workers' Compensation

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In some cases, workers return to work prior to the date they reach maximum medical improvement and thus have reduced responsibilities and an accompanying lower salary. In those cases, they receive temporary partial disability benefits.

After the date of maximum medical improvement, if a disability is severe enough, the worker receives permanent total disability benefits. Very few workers' compensation cases are found to have permanent total disabilities.

### Permanent Partial Disability

If the permanent disability of a worker is only partial and may or may not lessen work ability, permanent partial disability benefits are payable. The system for determining benefits in these cases is very complex and varies significantly 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 based on the 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 payable to the survivors of workers who die from a work-related illness or injury. Benefits are capped in 26 states.

### Medical Benefits

All compensation acts require that medical aid be furnished to workers suffering from a work-related injury or illness without delay, whether or not the condition entails work interruption. This care includes first-aid treatment, physician services, surgical and hospital services, nursing, medical drugs and supplies, appliances, and prosthetic devices. Care is typically provided with no co-payment from the worker. A few state laws contain provisions for nominal 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 seven jurisdictions, however, commercial insurance is not allowed. In four of these areas, including Puerto Rico and the Virgin Islands, 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 19 jurisdictions, state funds have been established that compete with private insurance carriers. Federal employees are provided protection through a federally financed and operated system.

## Workers' Compensation Program Summary

Benefit payments under workers' compensation programs increased 6.4 percent in 2000 to \$45.9 billion, from the 1999 amount of \$43.1 billion. As a percentage of covered wages, however, benefits fell 1.3 percent from 1.08 to 1.06.

In 2000, medical benefits accounted for \$20.0 billion, and wage loss compensation for \$25.9 billion. The latter amount includes payments to disabled workers and the survivors of deceased workers.

The \$45.9 billion for workers' compensation benefit payments in 2000 includes over \$930 million in benefits for the Black Lung program. (See Tables 9.B1–9.B3.)

The employers' cost of providing workers' compensation coverage generally varies according to risk, industrial classification, and experience rating. Nationally, in 2000, such costs were approximately 1.25 percent of covered payroll, or about \$442 for each of the 123.7 billion protected employees.

The year 2000 is the eighth year in a row that benefits relative to covered wages declined. It is the seventh consecutive year that employer costs declined relative to covered wages.

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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 to 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 five state temporary disability insurance laws and the Puerto Rico law 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 Hawaii and New York laws require employers to provide their own disability insurance plans for their workers by setting up an approved self-insurance plan, by 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 disability 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 to 52 weeks. Hawaii, New York, and Puerto Rico provide for benefits of a uniform duration of 26 weeks for all claimants; California and the railroad program have maximum benefit periods of 52 weeks; New Jersey, 26 weeks; and Rhode Island, 30 weeks. Under the railroad program, duration of benefits varies from 26 weeks to 52 weeks, based on the total number of years of employment in the industry. In the other jurisdictions, limited pre-disability "base period" wages reduce benefit duration. A noncompensable waiting period of a week or 7 consecutive days of disability (4 days for railroad workers) is generally required before the payment of benefits for subsequent weeks.

The statutory provisions described above govern the benefits payable to employees covered by the state-operated plans. In those states where private plans are permitted to participate, those provisions represent standards against which the private plan can be measured (in accordance with provisions in the state law).

### Financing and Administration

Under each of the laws, except for that governing the railroad program, employees may be required to contribute to the cost of the temporary disability benefit. In five of the jurisdictions (all but California and Rhode Island), employers are also required to contribute. In general, the government does not contribute.

Five of the seven TDI programs are administered by the same agency that administers unemployment

insurance. Under those 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 on 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.

Under the law, the basic Black Lung benefit rate is 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 3.6 percent adjustment, monthly benefit rates effective January 1, 2001 are:

Miner or widow \$518.50  
Miner or widow and one dependent \$777.80  
Miner or widow and 2 dependents \$907.40  
Miner or widow and 3 or more dependents  
(family benefit) \$1,037.00

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.

Under the 1972 amendments to the law, payments were extended 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). The 1972

amendments also expanded coverage to include surface as well as underground coal miners.

Significant program data under Part B in 2001 included the following:

- Between December 2000 and 2001, the total number of Black lung beneficiaries dropped from 89,400 to 79,500. The beneficiaries included 9,800 miners, 55,400 widows, and 14,300 dependents.
- Total annual payments declined from \$509.3 million in 2000 to \$470.4 million in 2001.
- The average monthly benefit for miners and their dependents for December 2001 was \$668.90 and \$508.20 for widows and their dependents.
- Ninety-seven percent of miners and widows were aged 65 or older in 2001.
- Seventy-three percent of all Black Lung beneficiaries resided in five states in 2001: Pennsylvania, West Virginia, Kentucky, Virginia, and Ohio.

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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, special loan programs, and hiring preference for certain jobs. Most of the veterans programs are administered by the Department of Veterans Affairs.

### 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 paid to the eligible spouse and children. These benefits are not means tested—that is, they 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

The disability compensation program pays monthly benefits to veterans whose disabilities resulted from injury or disease incurred while in, or aggravated by, active military duty, whether in wartime or peacetime. Individuals discharged or separated from military service under dishonorable conditions are 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 2002 range from \$103 a month for a 10-percent disability to \$2,163 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.

#### Pension 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.

Effective December 1, 2001, maximum benefit amounts for non-service-connected disabilities range from \$796 per month for a veteran without a dependent spouse or child to \$1,575 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 \$136 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.

Dependency and indemnity compensation payments may also be made if the veteran were receiving, or was entitled to receive, compensation for a service-connected disability at the time of death, and if certain conditions as to the severity of the disability are met.

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. Eligibility for benefits generally ends with the spouse's remarriage.

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 2002, for pay grades E-1 through E-6, a flat monthly rate of \$935 is paid to surviving spouses. Monthly benefits for grades E-7 through E-9 range between \$967 and \$1,066. For veterans who died after January 1, 1993, surviving spouses receive a flat \$935 a month. An additional \$204 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. 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 based on 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 2002, pensions range from \$534 a month for a surviving spouse without dependent children to \$1,018 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 \$136 a month for each additional dependent child.

### **Hospitalization and Other Medical Care**

The Department of Veterans Affairs provides a nationwide system of health care through a system of hospitals and community-based outpatient clinics to eligible veterans.

#### **Enrollment - Provisions 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 which the military determined was incurred or aggravated in the line of duty but which 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 includes 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, 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 co-payment.

#### **Nursing Home Care**

A veteran seeking nursing home care must meet the established eligibility requirements for admission to a Department of Veterans Affairs (VA) nursing home. The Veterans Millennium Health Care and Benefits Act, Public Law 106-117 passed by Congress on November 30, 1999, made amendments to the original authority for nursing home placement. The new law requires that VA—

- Provide nursing home care to any veteran in need of such care for a service-connected disability;
- Provide nursing home care to any veteran who is in need of such care and who has a service-connected disability rated at 70 percent or greater;
- Provide nursing home care, either directly or through contracts when clinically indicated for eligible veterans;
- Facilities to 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; however, there may be restrictions: domiciliary care, alcohol and drug dependency treatment; prosthetic appliances; modification in certain veterans home 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 after June 30, 1985, and for certain other individuals. Service members entering active duty have their basic pay reduced \$100 a month for

## Veterans' Benefits

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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 after June 30, 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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## Temporary Assistance for Needy Families

On August 22, 1996, The Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (PRWORA) became law. This comprehensive, bipartisan legislation changed the nation's welfare system into one requiring work in exchange for time-limited assistance. It created the Temporary Assistance for Needy Families (TANF) program, which replaced the Aid to Families with Dependent Children (AFDC), Emergency Assistance (EA), and Job Opportunities and Basic Skills Training (JOBS) programs. The law marks the end of federal entitlement to assistance. In TANF, states and territories operate programs, and Indian tribes have the option to run their own programs. States, territories, and tribes each receive a block grant allocation, and states must maintain a historical level of state spending known as maintenance of effort. The basic block grant provides states and tribes \$16.5 billion in federal funds each year, through 2002. This amount covers benefits, administrative expenses, and services targeted to needy families.

The 1996 law offers states great flexibility in designing individual state TANF programs. Unless expressly provided under the statute, the federal government may not regulate the conduct of states.

States may use TANF funds in any manner "reasonably calculated to accomplish the purposes of TANF." The purposes are assisting needy families so that children can be cared for in their own homes; reducing dependency of needy parents by promoting job preparation, work, and marriage; preventing out-of-wedlock pregnancies, and encouraging the formation and maintenance of two-parent families.

### Highlights

#### Work Requirements

With few exceptions, recipients must work as soon as job ready, or no later than 2 years after coming on assistance. In fiscal year 1997, each state had to ensure that 25 percent of all families in the state were engaged in work activities. This percentage increased to 50 percent in FY 2002. Minimum participation rates for two-parent families started at 75 percent in FY 1997 and increased to 90 percent. (If a state reduces its caseload, without restricting eligibility, it can receive a caseload reduction credit. This credit reduces the minimum participation rates the state must achieve.) During 1997 and 1998, single parents had to participate in work activities for at least 20 hours per week; by FY 2000, they had to participate at least 30 hours per week. Two-parent families had to participate in work activities for at least 35 or 55 hours per week, depending upon the circumstances. Failure to participate in work requirements can result in a reduction or a termination of benefits to the family. However, states cannot penalize

single parents with a child under 6 for failing to meet work requirements if they cannot obtain child care. A state may exempt single parents with children under the age of 1 from the work requirements and disregard these individuals in the calculation of participation rates for up to 12 months.

#### Work Activities

Activities that count towards a state's participation rates are unsubsidized or subsidized employment, on-the-job training, work experience, community service, job search, vocational training, job skills training related to work, or education directly related to work; satisfactory secondary school attendance; and providing child care services to individuals who are participating in community service. However, no more than 12 months of vocational training, no more than 6 total weeks of job search, and no more than 4 consecutive weeks of job search may count. Further, effective in FY 2000, no more than 30 percent of those meeting the participation rates may count toward the work requirement on the basis of participation in vocational training or by being a teen parent in secondary school.

#### Five-Year Time Limit

Families with an adult who has received federally funded assistance for a total of 5 years (or less at state option) are not eligible for cash aid under the TANF program. States may extend assistance beyond 60 months to up to 20 percent of their caseload. They may also elect to provide assistance to families beyond 60 months using state-only funds, or they may provide services to families that reach the time limit using Social Services Block Grants.

#### State Maintenance of Effort Requirements

The TANF block grant program has an annual cost-sharing requirement, referred to as "maintenance of effort," or MOE. Every fiscal year each state must spend a certain minimum amount of its own money to help eligible families in ways that are consistent with the purposes of the TANF program. The required MOE amount is based on an "applicable percentage" of the state's (non-federal) expenditures on AFDC and the AFDC-related programs in 1994. The applicable percentage depends on whether the state meets its minimum work participation rate requirements for that fiscal year. A state that does not meet the required minimum work participation rate requirements must spend at least 80 percent of the amount it spent in 1994. A state that meets its minimum work participation rate requirements must spend at least 75 percent of the amount it spent in 1994.

In addition to the federal TANF block grant funding, needy states with economic problems may request federal

## Temporary Assistance for Needy Families

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funds from the Contingency Fund. The Contingency Fund has a more rigorous MOE requirement.

### Additional Funding

*Bonuses to reward high performance and reduce out-of-wedlock births.*—Through FY 2003, \$1 billion is available to states for high performance bonuses for achieving program goals, such as moving welfare recipients into jobs. There is a separate \$100 million annual appropriation for bonuses to the 5 states that have the greatest success in reducing their out-of-wedlock birth rates, while also reducing their abortion rates.

*Contingency fund, supplemental grants, and loans.*—There is a contingency fund of \$2 billion available over 5 years to states experiencing economic downturns. There are a separate \$800 million fund available over 4 years to provide supplemental grants for states with high population growth and historically low welfare spending and a \$1.7 billion federal loan fund.

### Penalties

The Department of Health and Human Services (HHS) may reduce a state's block grant if it fails to do any of the following:

- Satisfy work requirements. A penalty of 5 percent accrues in the first year. The penalty amount increases 2 percent per year for each consecutive failure. The penalty is adjusted based on degree of failure. The maximum penalty is 21 percent.
- Comply with 5-year limit on assistance. Failure to comply results in a 5 percent penalty.
- Meet the state's basic maintenance of effort requirements. The penalty is based on the amount of the state's under-spending. The state also loses its Welfare-to-Work funds.
- Meet the State's Contingency Fund MOE requirement. The penalty is a reduction of the State's Federal TANF grant by the amount of Contingency Funds received and not remitted.
- Reduce recipient grants for refusing to participate in work activities without good cause. A penalty of between 1 percent and 5 percent is assessed based on the degree of noncompliance. Maintain assistance when a single custodial parent with a child under six cannot obtain child care. Failure to comply results in a penalty of 5 percent.
- Submit required data reports. A penalty of 4 percent accrues.
- Comply with paternity establishment and child support enforcement requirements. Failure to comply results in a penalty of up to 5 percent.
- Participate in the Income and Eligibility Verification System. A penalty of up to 2 percent accrues.

- Repay a federal loan on time. The penalty will be based on the amount unpaid.
- Use funds appropriately. Misuse of funds can result in states being penalized for the amount misused. If this misuse is found to be intentional, an additional penalty of 5 percent will be assessed.
- Replace federal penalty reductions with additional state funds. This provision results in a penalty of up to 2 percent and requires states to contribute state funds to make up for any reductions in federal funds due to penalties.

The total penalty assessed against a state in a given year may not exceed 25 percent of a state's block grant allotment. In some situations, states may avoid penalties: (1) if they demonstrate that they had reasonable cause for failing to meet the program requirements or (2) if they develop a corrective compliance plan, receive approval of their plan, and correct or discontinue the violation.

### Personal Employability Plans

States must make an initial assessment of a recipient's skills. States may develop personal responsibility plans for each recipient to identify the education, training, and job placement services needed to move into the workforce.

### Teen Parent Live-At-Home and Stay-In-School Requirement

Unmarried minor parents must participate in educational and training activities and live with a responsible adult or in an adult-supervised setting in order to receive assistance. States are responsible for assisting in locating adult-supervised settings for teens who cannot live at home.

### State Plans

HHS reviews state plans for completeness only. States must allow for a 45-day comment period on the state plan by local governments and private organizations and consult with them. The state plan must have "objective criteria" for eligibility and benefits that are "fair" and "equitable." The plan must explain appeal rights.

### Job Subsidies

The law allows states to create jobs by taking money that is now used for welfare checks and using it to create community service jobs, provide income subsidies, or provide hiring incentives for potential employers.

### Waivers

States that received approval for welfare reform waivers before January 1, 1997, have the option to operate their cash assistance program under some or all of these waivers, until the waivers expire.



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**Effective Dates**

States had until July 1, 1997, to submit state plans and begin implementing TANF, although they had the option to implement earlier.

HHS published final regulations covering the state TANF programs on April 12, 1999. These regulations took effect October 1, 2000.

**Tribal Programs**

Federally recognized Indian tribes may apply directly to HHS to operate a TANF block grant program. Eligible tribes include the federally recognized tribes in the lower 48 states and 13 designated entities in Alaska (that is, the 12 Alaska Native regional nonprofit associations and Matlakatla). TANF allotments for Indian tribes are based upon previous state expenditures of federal dollars in AFDC, Emergency Assistance (EA), and JOBS on tribal members in fiscal year 1994. Tribal TANF programs could be implemented as early as July 1, 1997. Like states, Indian tribes can use their TANF funding in any manner reasonably calculated to accomplish the purposes of TANF. They have broad flexibility to determine eligibility, method of assistance, and benefit levels. Unlike state plans, the federal government approves tribal plans. Tribes and HHS must reach agreement on time limits, work requirements, and minimum participation rates.

In addition to authorizing tribes to administer TANF, PRWORA replaced the former tribal JOBS program with the Native Employment Works (NEW) program. The NEW program provides funding for tribes and inter-tribal consortia to design and administer tribal work activities that meet the unique employment and training needs of their populations while allowing tribes and states to provide other TANF services.

HHS published final regulations for the tribal TANF and NEW programs on February 18, 2000.

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## Food Stamps

The Food Stamp program provides a means for persons with no or little income to obtain a nutritionally adequate diet. The program issues monthly allotments of coupons that are redeemable at retail food stores, or provides benefits through electronic benefit transfer (EBT). Eligibility and allotments are based on household size, income, assets, and other factors.

Households without income receive an amount equal to 100 percent of the June monthly cost of the Thrifty Food Plan (TFP—a nutritionally adequate diet) for a reference family of four adjusted for household size and economies of scale. This amount is updated every October for the new fiscal year to account for food price increases.

As of October 2002, an eligible four-person household in the continental United States with no income receives \$465 per month in food stamps. Households with income receive food stamps valued at the difference between the maximum allotment and 30 percent of their income, after certain allowable deductions.

To qualify for food stamps, a household must have:

1. Less than \$2,000 in disposable assets (\$3,000, if one member is aged 60 or older or is disabled),
2. Gross income below 130 percent of the poverty guidelines for the household size, and
3. Net income of less than 100 percent of the poverty guidelines allowable deductions.

Households with a person aged 60 or older or a disabled person receiving either Supplemental Security Income (SSI), Social Security (OASDI), state general assistance, or veterans' disability benefits (or interim disability assistance pending approval of any of the above programs) may have gross income exceeding 130 percent of the poverty guidelines if the income is lower than 100 percent of the poverty guidelines allowable deductions.

One- and two-person households that meet the applicable standard receive at least \$10 a month in food stamps.

All households in which all members receive Temporary Assistance for Needy Families (TANF) or SSI are categorically eligible for food stamps.

Net income is computed by subtracting the following deductions from monthly gross income:

1. Twenty percent of earned income.
2. Standard deduction of \$134 for fiscal year 2002 for households with one to four members, \$147 for households with five members, and \$168 for households with six or more members.
3. Amount paid for dependent care (up to \$200 a month for each child under age 2 and \$175 for all other dependents) while the dependent's caretaker is working or looking for work.

4. Out-of-pocket medical expenses in excess of a \$35 deductible for a person aged 60 or older or a disabled person. If more than one person in the household is aged or disabled, \$35 is subtracted once before deducting combined medical expenses.
5. Legally owed child support payments.
6. Excess shelter expenses, which is total shelter costs including utilities minus 50 percent of income after all the above deductions have been subtracted. Effective October 1, 2002, the limit was \$367. The limit does not apply to households with an aged or disabled member.

Households are certified to receive food stamps for varying lengths of time, depending on their income sources and individual circumstances. Recertification is required at least annually. Households whose sole income is from SSI payments or Social Security benefits are certified for a 12-month period, although states may request a waiver allowing for a 24-month certification period for these households. Households must report monthly income or expense changes of \$25 or more or other changes in circumstances that would affect eligibility.

Families with income or food loss resulting from disaster situations such as tornadoes or floods may be eligible for food stamps for up to 1 month if they meet the special disaster income and asset limits.

Special provisions allow the homeless, drug addicts, alcoholics, blind, or disabled residents in certain group living arrangements, residents of shelters for battered spouses and children, and persons aged 60 or older to use their coupons for meals prepared at a nonprofit facility. The elderly and homeless may also use their coupons to purchase concession-priced meals from authorized restaurants.

Households with members who are elderly (aged 60 or older), disabled, or lack transportation to the food stamp office may be certified for food stamps through a telephone interview or a home visit.

Initiated on a pilot basis in 1961, the Food Stamp program was formally established by the Food Stamp Act of 1964, with 22 states operating 43 projects, serving 350,000 people. The Food Stamp Act of 1977, as amended (P.L. 95-113), has been extended to all 50 states, the District of Columbia, Guam, and the Virgin Islands. Authorization for this program extends through September 30, 2002. (Since July 1982, Puerto Rico receives a block grant for nutrition assistance rather than participating in the Food Stamp program.)

The Food Stamp program is administered nationally by the Food and Nutrition Service of the Department of Agriculture (USDA) and operates through local welfare offices and the nation's food marketing and banking systems. Since August 1, 1980, persons receiving or applying for SSI payments have been permitted to apply for food

stamps through local Social Security district offices. The federal government, through general revenues, pays the entire cost of the food stamp benefits, but federal and state agencies share administrative costs.

An average of 18.9 million persons per month participated in the Food Stamp program each month during the first eight months of fiscal year 2002 (the period from October 2001 through May 2002). The average monthly value of food stamps per person was about \$79.75 and the total value of benefits issued during the first eight months of the year was \$12.1 billion. Total federal government costs for this program were \$13.1 billion.

### History of Provisions

The Food Stamp Act of 1984 (P.L. 88-525) established the Food Stamp Program. Originally, participants were required to purchase food stamp coupons. The difference between the face value of the coupons and the amount the participant paid was known as the "bonus value". The amount paid for coupons varied according to household income.

Amendments to the 1964 Act, enacted in 1971 (P.L. 91-671), established uniform national eligibility standards and uniform national benefit levels, required family allotments large enough to purchase a nutritionally adequate diet, provided free food stamps to the poorest recipients, required automatic cost-of-living increases in food stamp allotments, and established work-registration requirements for able-bodied adult household members up to age 65 (except students and those needed at home to care for children under age 18).

The Agriculture and Consumer Protection Act of 1973 (P.L. 93-86) expanded the program (while phasing out the family food distribution program), provided for semi-annual allotments of coupon adjustments, and broadened the categories of persons eligible to participate. This legislation extended the program nationwide, requiring all states to participate in the Food Stamp program.

The Food and Agricultural Act of 1977 (P.L. 95-113) made sweeping changes to the Food Stamp Program. It eliminated the purchase requirement and allowed households to receive only the bonus portion of their coupon allotments. Deductions from income were limited to a standard deduction, a 20-percent earnings deduction, and a combined excess shelter and child-care deduction. The poverty guidelines became the new eligibility limits and, for the first time, households receiving Aid to Families with Dependent Children (AFDC) or SSI payments were required to meet asset and income limits. The work registration requirements were tightened for students and for caretakers, whose children now had to be under age 12. Parents of children aged 12 or older were required to register for work. However, the age at which the registration exemption for older persons became effective was lowered from age 65 to age 60.

The Food Stamp Act Amendments of 1979 (P.L. 96-58) provided a medical deduction to elderly and disabled persons, removed the limit on their shelter deduction, and tightened fraud provisions.

Legislation enacted in 1980 provided for an annual, rather than semi-annual, adjustment to benefit levels and the amount of the standard deduction. This legislation also restricted student eligibility.

The Omnibus Budget Reconciliation Act (P.L. 97-35) and the Food Stamp and Commodity Distribution Amendments of 1981 (P.L. 97-98) mandated further changes in the Food Stamp program. For the first time, a gross income eligibility standard was applied to all households not containing an aged or disabled person. The earnings deduction was lowered to 18 percent. The updates to the TFP to account for inflation were postponed until October 1982 and the deduction limits were postponed until July 1983. For new participants, benefits for the first month were prorated from the day the application was filed. Boarders and persons who take part in strikes were excluded from the program and the definition of what constitutes a household was tightened. Provisions facilitating claims and overpayment collection and fraud recovery were also enacted.

The program in Puerto Rico was replaced by a block grant. Monthly reporting/retrospective accounting systems were made mandatory for all states effective October 1983. Households composed solely of all aged or disabled persons, as defined above, were exempted from the monthly reporting requirements, and migrant households were exempted from both requirements.

Further revisions were made by the Food Stamp Amendments of 1982 (P.L. 97-252). The maximum allotment was reduced from 100 percent to 99 percent of the TFP and adjustments to the standard and shelter deductions were delayed until October 1, 1983. (P.L. 98-473 restored maximum food stamp allotments to the full cost of the TFP beginning November 1, 1984.) A net income limit for nonelderly and non-disabled households was added to the existing gross income limit. Benefit computations and adjustments were rounded down to the nearest dollar, and new restrictions were placed on the use of the Standard Utility Allowance for the excess shelter expense deduction. At the same time, the definition of disability for food stamp purposes was expanded to include those persons receiving certain veterans' payments, and annual cost-of-living adjustments to SSI payments and Social Security benefits were not counted in determining food stamp amounts for 3 months.

The Food Stamp program authorization was extended for 5 years by the Food Security Act of 1985 (P.L. 99-198). Among the revisions enacted, the definition of disability for food stamp purposes was again extended to include recipients of state supplementary SSI payments, government disability benefits, and Railroad Retirement disability payments.

Households in which all members receive AFDC or SSI were made categorically eligible for food stamps. The earned income, childcare, excess shelter cost deductions, and asset limits were increased as of May 1986. Portions of the income received under the Job Training Partnership Act were now considered countable income. Further, all states were required to implement an employment and training program for food stamp recipients by April 1987.

The Hunger Prevention Act of 1988 (P.L. 100-435) made several changes in the program. It raised the maximum food stamp allotments and established allotments as specified percents of the TFP as of the preceding June. For fiscal year 1989, the allotments were 100.65 percent of the TFP for June 1988; for fiscal year 1990, they were 102.05 percent of the TFP for June 1989; and for fiscal years 1991 and on, they are to be 103.00 percent of the TFP.

Other provisions of the 1988 legislation required states to institute prospective budgeting for households not required to report monthly and retrospective budgeting for households reporting monthly. It extended disability status to individuals who receive interim assistance pending the receipt of Supplemental Security Income, Social Security, or state disability payments, and allowed the elderly, disabled, and those without transportation to apply for food stamps via telephone interviews. It required states to process Food Stamp applications jointly with AFDC and general assistance applications. It raised the dependent-care deduction from \$160 per household to \$160 per dependent. It made permanent an amendment in the Homeless Eligibility Clarification Act that exempts residents of shelters from ineligibility as residents of institutions.

Several provisions of the 1988 legislation also affect persons in farming. Households with farm income and expenses were given the option of averaging irregular farm-related expenses and farm income over 12 months and excluding as resources the value of farm land, equipment, and supplies for a period of 1 year after a household member ceases to be self-employed in farming.

The Mickey Leland Memorial Domestic Hunger Relief Act of 1990 (P.L. 101-624) reauthorized the Food Stamp program and the Nutrition Assistance Program in Puerto Rico with no major changes through fiscal year 1995.

Legislation enacted in 1992 prevented a one-time decrease of food stamp allotments for the year beginning October 1, 1992, even though the cost of the TFP had declined slightly.

The Omnibus Budget Reconciliation Act of 1993 (Mickey Leland Childhood Hunger Relief Act, P.L. 103-66) made a number of program revisions including the following.

- The earnings of elementary or high school students who were aged 21 or younger were disregarded.
- Households that had breaks in participation of less than a month were allowed to receive a full month's benefit for the period of the break.

- The children of drug addicts and alcoholics living in treatment centers were permitted to qualify for food stamps.
- Food stamp households participating in demonstration projects were permitted to accumulate up to \$10,000 in resources.
- The shelter cap was raised to \$231 beginning July 1, 1994, then to \$247 beginning October 1995, and was to be eliminated entirely on January 1, 1997.
- The deduction for care of a child or other dependent was raised to \$200 per month for a child under age 2, and \$175 per month for all other dependents, effective September 1, 1994.
- State agencies were given the option to provide deductions for legally binding child support payments made to persons outside the household, effective September 1, 1994. This deduction became mandatory October 1, 1995.
- The definition of a food stamp household was simplified to allow adult siblings who lived together and adult children who lived with their parents to form separate households if they purchased or prepared food separately.
- The amount of the Fair Market Value of a household's first vehicle that is excluded from the asset test was increased from \$4,500 to \$4,550, effective September 1, 1995. The limit was to have been raised to \$5,000, effective October 1, 1996, and indexed thereafter.

Legislation enacted in 1994 primarily provided means to combat fraud in the coupon redemption process.

Legislation enacted in 1995, prevented a one-time decrease of food stamp allotments in Alaska for the year beginning October 1, 1994, even though the cost of the TFP for Alaska had declined slightly.

The Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (P.L. 104-193) made sweeping changes to the Food Stamp program. Additional restrictions were placed on the eligibility of certain low-income persons.

- Legal immigrants became ineligible for benefits, unless they met one of the following criteria: were naturalized citizens, had worked and paid taxes in the country for 40 quarters (or were the spouse or minor child of someone who had met the work requirement), had served in the U.S. armed forces (or were the spouse or child or a veteran) or were refugees, asylees, or persons granted a stay of deportation when admitted and have lived in the United States for less than 5 years. Legal immigrants currently receiving benefits were allowed to receive benefits until their first recertification after April 1, 1997, or until August 22, 1997, whichever date came first.
- Time limits were imposed for childless unemployed

adults aged 18–50. Those who are not disabled are limited to receiving 3 months of benefits in any 36-month period, unless they are working 20 hours per week, participating in a work training program for at least 20 hours per week, or participating in work fare. States may request waivers for areas with at least 10-percent unemployment or insufficient jobs.

Other key provisions included the following:

- The maximum allotment was set at 100 percent of the Thrifty Food Plan, effective October 1, 1996.
- The standard deduction was frozen at \$134.
- The excess shelter deduction cap was set at \$250, effective January 1, 1997 (instead of being lifted), to be raised to \$275 on October 1, 1998, and \$300 on October 1, 2000.
- The earnings of elementary or high school students aged 18–21 was counted again.
- Households with breaks in participation of less than a month received prorated benefits for the period of the break.
- Adult children under age 22 living with their parents were counted in the same household as their parents.
- The amount of Fair Market Value for a household's first vehicle that is excluded from the asset test was frozen at \$4,650, effective October 1, 1996.
- State and local energy assistance was counted as income.
- Recipients could be disqualified or given sanctions for a variety of reasons, such as failure to pay child support, receipt of multiple benefits, or failure to meet work requirements.
- States were permitted to operate a simplified Food Stamp program for households in which all household members participate in the state's Temporary Assistance for Needy Families program. In the simplified Food Stamp program, states may utilize their TANF rules to determine Food Stamp program benefits provided the TANF rules do not increase the aggregate cost of the Food Stamp program.
- States were required to implement Electronic Benefit Transfer (EBT) systems for issuing benefits before October 1, 2002, unless USDA granted a waiver.

The Balanced Budget Act of 1997 (P.L. 105-33) increased funds for the Food Stamp Employment and Training program, restricted the use of these funds, and made them available until spent. States were required to earmark 80 percent of these funds to provide work or training programs to childless, unemployed, able-bodied 18–50 year olds. The Act also allowed states to grant discretionary exemptions from the time limits for up to 15 percent of a state's unwaived caseload of childless, unemployed, able-bodied 18–50 year olds.

The Agricultural Research, Extension, and Education Reform Act of 1998 (P.L. 105-185) partially restored benefits to legal immigrants. Those who were lawfully residing in the United States on August 22, 1996, and are either: (1) blind or disabled (using the Food Stamp Act definition of "disability"), (2) aged 65 or older on August 22, 1996, or (3) under the age of 18 were eligible for benefits effective November 1, 1998. In addition, refugees and asylees were made eligible for the first 7 years after admittance into the United States (extended from 5 years). Members of Hmong or Highland Laotian tribes aiding U.S. personnel during the Vietnam War, and their spouses or unmarried dependent children were made eligible. Cross-border Native Americans were also made eligible. Other provisions reduced the funding for Employment and Training Programs by \$100 million in 1999 and by \$45 million in 2000 and reduced payments for Food Stamp program administrative costs.

The Electronic Benefit Transfer (EBT) Interoperability and Portability Act of 2000 (P.L. 106-71) required states to make their EBT systems inter-operable across state lines by October 2, 2002.

The Agriculture, Rural Development, Food and Drug Administration, and Related Agencies Appropriation Act, 2001 (P.L. 106-387) made the following changes to the Food Stamp program:

- Effective July 2001, at state option, state agencies could substitute TANF vehicle rules in place of food stamp vehicle rules provided that the TANF vehicle rules were more liberal.
- Effective March 2001, for households whose certification period began on or after March 1, 2001, the maximum excess shelter deduction limit rose to \$340, and was to be adjusted for inflation on October 1, 2002 and every year after.

The Farm Security and Rural Investment of 2002, H.R. 107-171, reauthorized the Food Stamp Program through September 30, 2007. It contained the following provisions:

- Effective April 1, 2003, legal immigrants with 5 years residency in the United States become eligible for food stamps. Effective October 1, 2003, eligibility is extended to legal immigrants under age 18, regardless of date of arrival in the United States.
- The current fixed standard deduction was replaced with a deduction that varies according to household size (with larger households receiving larger deductions) and is adjusted annually.
- The resource limit for households with a disabled member was increased from \$2,000 to \$3,000, consistent with the resource limit for households with elderly members.
- The requirement that federal costs for electronic benefit transfer systems not exceed the costs of paper coupon systems was eliminated.
- The Quality Control System, which currently mea-

## Food Stamps

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sure payment accuracy, was substantially changed, with the liability threshold raised to 105 percent of the national average for 2 consecutive years. The current incentive system was replaced by bonuses for states demonstrating high or most improved performance.

This legislation also provided states with a number of options:

- States could extend from 3 months to 5 months the period of time that households leaving TANF could receive food stamps without recertification. The benefit amount would be equal to the amount received by the household prior to the household leaving TANF, with adjustments made for the loss of TANF income.
- States could exclude certain types of income that were excluded under the state's TANF plan. States could exclude types of resources that were excluded under the state's TANF or Medicaid programs.
- States could disregard reported changes in deductions during certification periods unless the changes were associated with a new residence or earned income.
- States could use the full standard utility allowance (SUA) rather than a prorated SUA for households sharing living quarters.
- States could treat child support payments to non-household members as an income exclusion rather than a deduction.
- States could extend semi-annual reporting of changes to all households not exempt from periodic reporting.

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## Low-Income Home Energy Assistance Program

The Omnibus Budget Reconciliation Act of 1981 (P.L. 97-35), signed into law by the President on August 13, 1981, authorized seven block grants to be administered by the Department of Health and Human Services (HHS).<sup>1</sup> As one of HHS' block grants, the Low-Income Home Energy Assistance Program (LIHEAP) is administered by the Administration for Children and Families' Office of Community Services (<http://www.acf.hhs.gov/programs/liheap>).

### Reauthorization

Title XXVI of the Act authorized LIHEAP for fiscal years 1982–1984. Title VI of the Human Services Reauthorization Act of 1984 (P.L. 98-88) reauthorized and amended LIHEAP for fiscal years 1985–1986. Title V of the Human Services Reauthorization Act of 1986 (P.L. 99-425) reauthorized and amended LIHEAP for fiscal years 1987–1990. Title VII of the Augustus F. Hawkins Human Services Reauthorization Act of 1990 (P.L. 101-501) reauthorized and amended LIHEAP for fiscal years 1991–1994. Title XX of the National Institutes of Health Revitalization Act of 1993 (P.L. 103-43) reauthorized LIHEAP for fiscal year 1995. Title III of the Human Services Amendments of 1994 (P.L. 103-252) reauthorized and amended LIHEAP for fiscal years 1995–1999.<sup>2</sup> Title III of the Coats Human Services Reauthorization Act of 1996 (P.L. 105-285) reauthorized and amended LIHEAP for fiscal years 2000–2004.

### Recent Legislation

The following provisions became effective in fiscal year 2000:

- **Emergency Contingency Fund Revisions.** Section 2603 is amended to add definitions of the terms "natural disaster" and "emergency" to clarify the conditions under which energy emergency contingency funds may be released. Specifically, this section authorizes the release of contingency funds to meet additional home energy needs resulting from floods, earthquakes, tornadoes, hurricanes, or ice storms, as well as abnormal heat or cold. Also, section 2603 is amended to authorize the release of funds in cases of supply shortages or disruptions and for significant increases in (1) home energy costs; (2) home energy disconnections; (3) participation in a public benefit program such as Food Stamps, Supplemental Security Insurance (SSI), or

Temporary Assistance for Needy Families (TANF); or (4) unemployment, layoffs, or applications for unemployment benefits. The President retains the authority to determine whether to release any of the contingency funds.

Section 2604(g) is renumbered as Section 2604(e) and clarifies the conditions that the Secretary must consider in determining whether to allocate contingency funds to specific grantees.

- **Priority for Weatherization Assistance.** Section 2604(k) is amended to add language that grantees should give priority for weatherization services to those households with the lowest incomes that pay a high proportion of their income for home energy.
- **Technical Assistance Training, and Compliance Reviews.** Section 2609A is amended to increase to \$300,000 the authorization to set aside funds for training and technical assistance. Also adds authority to use these funds to make interagency agreements, including with other federal agencies, and to conduct on-site compliance reviews of LIHEAP grantees.

Under LIHEAP, grants are available to assist eligible households to meet the costs of home energy. In addition to the 50 states and the District of Columbia, grants were provided in fiscal year 2000 to 128 Indian tribes or tribal organizations and 5 trust territories.

In accordance with the Act, the Secretary of HHS has left maximum policy discretion to the grantees. The federal information collection and reporting requirements for grantees were substantially reduced to require only information essential to federal administration and congressional oversight. Grantee decisions, directed by public participation in the development of grant applications, largely replaced federal regulations in shaping the program for fiscal years 1982–1999.

### Funding

For fiscal year 2000, \$1.1 billion was appropriated as advanced funding under P.L. 105-277, including the set aside of \$27.5 million for leveraging incentive awards. The Consolidated Appropriations Act for fiscal year 2000 (P. L. 106-113), included an appropriation of \$300 million for fiscal year 2000 for the LIHEAP emergency contingency funds. Under the terms of the contingency fund provision, the President could request all, part, or none of the \$300 million for fiscal year 2000; could distribute any amount so requested to all LIHEAP grantees or to just a portion of them; and could use the regular block grant formula or a different formula.

Because of substantially higher prices for fuel oil and propane during the 1999–2000 winter, the President released by February 2000 all \$300 million in contingency

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<sup>1</sup> Effective in fiscal year 1987 the Primary Care Block Grant was repealed by the Health Services Amendment Act of 1985 (P.L. 99-80) enacted April 26, 1986.

<sup>2</sup> The 1994 amendments provided that up to 25 percent of leveraging incentive funds may be set aside for the Residential Energy Assistance Challenge (REACH) program.

funds that had been appropriated by Public Law 106-113. He requested an additional \$600 million in LIHEAP contingency funds for fiscal year 2000 to meet continuing needs. The Emergency Supplemental Act of 2000 (P.L. 106-146) appropriated an additional \$600 million in LIHEAP energy emergency contingency funds to be available to HHS until expended. In fiscal year 2000, the President released contingency funds seven times for a total of \$744.35 million (of the \$900 million available).

Fiscal year 2000 LIHEAP funds were distributed approximately as follows:

- \$1.06 billion in block grants to the 50 states and the District of Columbia;
- \$11 million in direct block grants to 128 Indian tribes and tribal organizations;
- \$1.5 million in block grants to American Samoa, Guam, Northern Mariana Islands, Puerto Rico, and the Virgin Islands; and
- \$18.9 million in leveraging incentive awards to 37 states and \$1.7 million in leveraging incentive awards to 29 tribes and tribal organizations;
- \$5.5 million in REACH awards to 5 states, \$845,000 to 6 Indian tribes and tribal organizations, and \$124,000 to American Samoa;
- \$732 million in emergency contingency funds to 50 states and the District of Columbia, \$12.3 million to 128 Indian tribes and tribal organizations, and \$386,000 to American Samoa, Guam, Northern Mariana Islands, Puerto Rico, and the Virgin Islands; and
- \$0.3 million for training and technical assistance.

The funds appropriated for LIHEAP provide payments to eligible households for heating or cooling costs and for home energy crises. Up to 15 percent of the available funds may be used for low-cost residential weatherization or other energy-related home repairs. Grantees can request from HHS a waiver to allow up to 25 percent of available funds to be spent for low-cost residential weatherization or other energy-related home repairs.

To receive grants in each of the three fiscal years, each grantee had to submit an application consisting of signed assurances by its chief executive officer and a plan describing how the grantee would carry out those assurances. In the assurances, the grantee agreed to:

- Use funds only for the purposes of the statute;
- Make payments only to eligible low-income households;
- Conduct outreach activities;
- Coordinate LIHEAP activities with similar and related programs;
- Provide, in a timely manner, that the highest level of assistance will be furnished to those households with the lowest incomes and highest energy costs in

relation to income, taking into account family size, except that the grantee may not differentiate between categorically eligible and income eligible households;

- Give consideration to agencies that have previously managed the program when designating local agencies to carry out the purposes of the program;
- Assure that energy suppliers receiving benefits directly on behalf of eligible households not treat assisted households adversely;
- Treat owners and renters equitably;
- Use not more than 10 percent of its allotment for planning and administration;
- Establish fiscal control and accounting procedures for proper disbursement of and accounting for federal funds, establish procedures for monitoring assistance provided, and prepare an annual audit;
- Permit and cooperate with federal investigations;
- Provide for public participation in the development of its plan;
- Provide an opportunity for a fair administrative hearing to individuals whose claims for assistance are denied or not acted on with reasonable promptness;
- Cooperate with HHS in collecting and reporting data under section 2610 of the statute;
- Provide outreach and intake through additional state and local government entities or community-based organizations under certain circumstances; and
- Use no more than 5 percent of funds to encourage and enable households to reduce their home energy needs.

### **Eligibility**

The unit of eligibility for energy assistance is the household, defined as any individual or group of individuals who are living together as one economic unit for which residential energy is customarily purchased in common, either directly or through rent. The Act limits payments to those households with incomes under the greater of 150 percent of the income guidelines or 60 percent of the state's median income; or to those households with members receiving benefits from the Temporary Assistance for Needy Families (TANF) program, SSI, Food stamps, or needs-tested veterans' benefits. No household may be excluded from eligibility on the basis of income alone if household income is less than 110 percent of the poverty guidelines. Grantees are permitted to set more restrictive criteria as well.



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## Payments

Grantees make fuel assistance payments directly to eligible households or to home energy suppliers on behalf of eligible households. Payments can be provided in cash, fuel, prepaid utility bills, or as vouchers, stamps, or coupons that can be used in exchange for energy supplies. Payments are to vary in such a way that the highest level of assistance is furnished to households with the lowest incomes and highest energy costs in relation to income, taking into account family size.

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

**Table 2.A1—Type of covered employment and self-employment**

Year enacted	Coverage election or waiver if any	Category of worker
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 Jan. 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 Dec. 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 Jan. 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 Dec. 20, 1977.
1982 .....		Federal employees—Hospital Insurance (Part A) program only, effective Jan. 1, 1983.
1983 .....		Federal employees (except reemployed annuitants hired before Jan. 1, 1984), including executive, legislative, and judicial branch employees and including those with previous periods of federal service if the break in service lasted more than 365 days.
		Legislative branch employees hired before 1984 who were not participating in the Civil Service Retirement System on Dec. 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.

Table 2.A1—Type of covered employment and self-employment—Continued

Year enacted	Coverage election or waiver if any	Category of worker
1984 .....	Elective by employer or by employer and employee	<p>Employees of nonprofit organizations placed under compulsory coverage; nonprofit organizations prohibited from terminating coverage of their employees on or after Mar. 31, 1983.</p> <p>States prohibited from terminating coverage of employees (after Apr. 20, 1983) and permitted to reinstate coverage for a terminated group.</p> <p>Rehired federal employees whose previous service was covered.</p> <p>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.</p> <p>Generally, all legislative branch employees except those who were participating on Dec. 31, 1983, and are also currently participating in the Civil Service Retirement System or another federal retirement system.</p> <p>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 Jan. 1, 1984, or reemployed after a break in service of more than 365 days.</p>
1986 .....	Elective by employer	<p>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.</p> <p>State and local government employees hired after Mar. 31, 1986—Hospital Insurance (Part A) program only.</p>
1987 .....	Elective by individual	<p>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 Oct. 22, 1986.</p>
1990 .....		<p>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.</p>
1994 .....		<p>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.</p>
		<p>Threshold for exclusion of wages paid to election workers raised from \$100 to \$1,000 annually beginning Jan. 1, 1995, and will be indexed for wage increases each year after Dec. 31, 1999.</p> <p>Police and fire fighters under a public retirement system can be covered for Social Security in all states.</p> <p>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.</p>

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm).

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

**Table 2.A2—Noncontributory wage credits (in dollars)**

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 (Sept. 16, 1940–July 24, 1947).
1952 .....	Same military wage credits to Dec. 31, 1953.
1953 .....	Same military wage credits to June 30, 1955.
1954 .....	Same military wage credits to Mar. 31, 1956.
1956 .....	Same military wage credits to Dec. 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 (Dec. 7, 1941–Dec. 31, 1946) and 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, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm).

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Table 2.A3—Annual maximum taxable earnings and actual contribution rates, 1937–2002 and thereafter

Year	Annual maximum taxable earnings		Contribution rate (percent)								
			Employer and employee, each				Self-employed person				
	OASDI	HI	Total	OASI	DI	HI	Total	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	...	...	...	...	...	...	...
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>c</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
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	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	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	2.9
2003 and later	<sup>a</sup>	<sup>e</sup>	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9	2.9

a. Based on automatic adjustment, under 1972 legislation (as modified by 1973 legislation), in proportion to increases in average wage level.

b. Includes tax credit, see Table 2.A5.

c. Based on automatic adjustment, under 1972 legislation (as modified by 1973 legislation), 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 1990 legislation.

e. Upper limit on earnings subject to HI taxes was repealed by OBRA 1993.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm).

Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

NOTE: . . . = not applicable.

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

**Table 2.A4—Maximum annual amount of contribution, 1937–2002 (in dollars)**

Year	Employee					Self-employed person				
	Total OASDHI	Total OASDI	OASI	DI	HI	Total OASDHI	Total 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
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

a. Includes tax credit, see Table 2.A5.

b. Upper limit on earnings subject to HI taxes was repealed by the Omnibus Budget Reconciliation Act (OBRA) of 1993.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm).

Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

NOTE: ... = not applicable.

CONTACT: Greg Diez (410) 965-0153 or Curt Pauzenga (410) 965-7210.

Table 2.A5—Tax credits

Year enacted	Group	Tax payable under—	Percent of earnings	Tax credit, effective with respect to—
1983 .....	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, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm).

NOTE: During this period, scheduled taxes were credited to the Social Security trust funds, monies for tax credits were paid from the Treasury, and the reduced tax rates were paid by employees and the self-employed.

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Table 2.A6—Appropriations from general revenues and interfund borrowing

Year enacted	Type of transaction	Provision
1935 .....	Appropriations from general revenues	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 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 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 1984–89, see Table 2.A5.
1993 .....		Transfers in each year from the Treasury Department to the 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.
1981 .....	Interfund borrowing	Interfund borrowing permitted among OASI, DI, and HI trust funds as needed until Dec. 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 1983–87, with provisions for scheduled repayment, no later than Dec. 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, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm).

CONTACT: Greg Diez (410) 965-0153 or Curt Pauzenga (410) 965-7210.

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

**Table 2.A7—Insured status (benefit eligibility)**

Year enacted	Eligibility concept	Provision	
1939 .....	Quarter of coverage (QC)	Calendar quarter in which \$50 of wages is earned. Four 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 Jan. 1, 1978 (effective on Jan. 1 of each year, dollar amount subject to automatic increase):	
		<i>Amount (dollars)</i>	<i>Year</i>
		260 .....	1979
		290 .....	1980
		310 .....	1981
		340 .....	1982
		370 .....	1983
		390 .....	1984
		410 .....	1985
		440 .....	1986
		460 .....	1987
		470 .....	1988
		500 .....	1989
	520 .....	1990	
	540 .....	1991	
	570 .....	1992	
	590 .....	1993	
	620 .....	1994	
	630 .....	1995	
	640 .....	1996	
	670 .....	1997	
	700 .....	1998	
	740 .....	1999	
	780 .....	2000	
	830 .....	2001	
	870 .....	2002	
1954 .....	Disability definition	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.	
1954 .....	Period of disability	Continuous period of at least 6 months as defined above or of blindness.	
1972 .....		At least 5 months of disability.	
1935 .....	Fully insured	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 1/3 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 Jan. 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 Jan. 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.	



Table 2.A7—Insured status (benefit eligibility)—Continued

Year enacted	Eligibility concept	Provision
1939 .....	Currently insured	6 QC earned in 12 quarters before quarter of death.
1946 .....		6 QC earned in preceding 13 quarters, including quarter of death.
1950 .....	Disability insured	Including quarter of retirement added.
1954 .....		Including quarter of disablement added.
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.	
1965 .....	Transitionally insured	Same as fully insured, but minimum reduced to 3 QC.
1966 .....	Requirement for special age-72 monthly benefit	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, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

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

**Table 2.A8—Factors for indexing earnings, 1951–2002**

Year	Annual maximum taxable earnings (dollars)	Average annual wage (dollars) <sup>a</sup>	Factors <sup>b</sup> for workers who were first eligible (attained age 62, became disabled, or died) in—						
			1989	1990	1991	1992	1993	1994	1995
1951	3,600	2,799.16	6.5828713	6.9070864	7.1805649	7.5122465	7.7921948	8.1936795	8.2641471
1952	3,600	2,973.32	6.1972845	6.5025090	6.7599687	7.0722223	7.3357728	7.7137409	7.7800809
1953	3,600	3,139.44	5.8693621	6.1584359	6.4022724	6.6980035	6.9476085	7.3055768	7.3684065
1954	3,600	3,155.64	5.8392307	6.1268205	6.3694053	6.6636182	6.9119418	7.2680724	7.3305795
1955	4,200	3,301.44	5.5813554	5.8562445	6.0881161	6.3693358	6.6066928	6.9470958	7.0068425
1956	4,200	3,532.36	5.2164870	5.4734059	5.6901194	5.9529550	6.1747953	6.4929452	6.5487861
1957	4,200	3,641.72	5.0598371	5.3090408	5.5192464	5.7741891	5.9893677	6.2979636	6.3521276
1958	4,200	3,673.80	5.0156541	5.2626817	5.4710518	5.7237683	5.9370679	6.2429691	6.2966601
1959	4,800	3,855.80	4.7789071	5.0142746	5.2128093	5.4535972	5.6568287	5.9482909	5.9994476
1960	4,800	4,007.12	4.5984423	4.8249216	5.0159591	5.2476542	5.4432111	5.7236669	5.7728918
1961	4,800	4,086.76	4.5088310	4.7308968	4.9182115	5.1453915	5.3371375	5.6121279	5.6603936
1962	4,800	4,291.40	4.2938225	4.5052990	4.6836813	4.9000280	5.0826304	5.3445076	5.3904716
1963	4,800	4,396.64	4.1910436	4.3974581	4.5715706	4.7827386	4.9609702	5.2165790	5.2614428
1964	4,800	4,576.32	4.0264907	4.2248007	4.3920770	4.5949540	4.7661877	5.0117605	5.0548629
1965	4,800	4,658.72	3.9552731	4.1500756	4.3143932	4.5136819	4.6818869	4.9231162	4.9654562
1966	6,600	4,938.36	3.7313015	3.9150730	4.0700860	4.2580897	4.4167699	4.6443394	4.6842818
1967	6,600	5,213.44	3.5344245	3.7084996	3.8553335	4.0334175	4.1837251	4.3992872	4.4371221
1968	7,800	5,571.76	3.3071256	3.4700059	3.6073969	3.7740283	3.9146697	4.1163690	4.1517707
1969	7,800	5,893.76	3.1264439	3.2804254	3.4103102	3.5678378	3.7007954	3.8914751	3.9249427
1970	7,800	6,186.24	2.9786284	3.1253298	3.2490738	3.3991536	3.5258251	3.7074895	3.7393748
1971	7,800	6,497.08	2.8361218	2.9758045	3.0936282	3.2365278	3.3571389	3.5301120	3.5604718
1972	9,000	7,133.80	2.5829866	2.7102021	2.8175096	2.9476548	3.0575009	3.2150355	3.2426855
1973	10,800	7,580.16	2.4308867	2.5506111	2.6515997	2.7740813	2.8774591	3.0257171	3.0517390
1974	13,200	8,030.76	2.2944914	2.4074982	2.5028204	2.6184296	2.7160070	2.8559464	2.8805082
1975	14,100	8,630.92	2.1349416	2.2400903	2.3287842	2.4363544	2.5271466	2.6573552	2.6802091
1976	15,300	9,226.48	1.9971333	2.0954947	2.1784635	2.2790902	2.3640218	2.4858256	2.5072043
1977	16,500	9,779.44	1.8842091	1.9770089	2.0552864	2.1502233	2.2303527	2.3452693	2.3654391
1978	17,700	10,556.03	1.7455909	1.8315636	1.9040823	1.9920349	2.0662692	2.1727316	2.1914176
1979	22,900	11,479.46	1.6051722	1.6842290	1.7509142	1.8317917	1.9000545	1.9979529	2.0151357
1980	25,900	12,513.46	1.4725352	1.5450595	1.6062344	1.6804289	1.7430511	1.8328600	1.8486230
1981	29,700	13,773.10	1.3378622	1.4037537	1.4593338	1.5267427	1.5836377	1.6652330	1.6795543
1982	32,400	14,531.34	1.2680530	1.3305063	1.3831863	1.4470778	1.5010040	1.5783417	1.5919158
1983	35,700	15,239.24	1.2091489	1.2687011	1.3189339	1.3798575	1.4312787	1.5050239	1.5179674
1984	37,800	16,135.07	1.1420161	1.1982619	1.2457058	1.3032469	1.3518132	1.4214639	1.4336889
1985	39,600	16,822.51	1.0953484	1.1492958	1.1948009	1.2499906	1.2965723	1.3633768	1.3751022
1986	42,000	17,321.82	1.0637745	1.1161668	1.1603602	1.2139590	1.2591979	1.3240768	1.3354642
1987	43,800	18,426.51	1.0000000	1.0492513	1.0907953	1.1411808	1.1837076	1.2446969	1.2554016
1988	45,000	19,334.04	1.0000000	1.0000000	1.0395939	1.0876144	1.1281450	1.1862715	1.1964737
1989	48,000	20,099.55	1.0000000	1.0000000	1.0000000	1.0461916	1.0851785	1.1410912	1.1509049
1990	51,300	21,027.98	1.0000000	1.0000000	1.0000000	1.0000000	1.0372656	1.0907096	1.1000900
1991	53,400	21,811.60	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0515240	1.0605673
1992	55,500	22,935.42	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0086002
1993	57,600	23,132.67	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1994	60,600	23,753.53	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1995	61,200	24,705.66	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1996	62,700	25,913.90	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1997	65,400	27,426.00	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
1999	72,600	30,469.84	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
2001	80,400	...	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2002	84,900	...	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000

See footnotes at end of table.

Table 2.A8.—Factors for indexing earnings, 1951–2002—Continued

Year	Annual maximum taxable earnings (dollars)	Average annual wage (dollars) <sup>a</sup>	Factors <sup>b</sup> for workers who were first eligible (attained age 62, became disabled, or died) in—						
			1996	1997	1998	1999	2000	2001	2002
1951	3,600	2,799.16	8.4859494	8.8260978	9.2577416	9.7979394	10.3107504	10.8853513	11.4873105
1952	3,600	2,973.32	7.9888912	8.3091157	8.7154763	9.2240324	9.7068059	10.2477500	10.8144498
1953	3,600	3,139.44	7.5661679	7.8694481	8.2543065	8.7359529	9.1931809	9.7055016	10.2422152
1954	3,600	3,155.64	7.5273257	7.8290489	8.2119317	8.6911054	9.1459862	9.6556768	10.1896351
1955	4,200	3,301.44	7.1948998	7.4832982	7.8492718	8.3072841	8.7420762	9.2292575	9.7396348
1956	4,200	3,532.36	6.7245496	6.9940946	7.3361435	7.7642143	8.1705828	8.6259158	9.1029284
1957	4,200	3,641.72	6.5226129	6.7840636	7.1158409	7.5310568	7.9252221	8.3668816	8.8295695
1958	4,200	3,673.80	6.4656568	6.7248244	7.0537046	7.4652948	7.8560183	8.2938211	8.7524688
1959	4,800	3,855.80	6.1604673	6.4074018	6.7207583	7.1129208	7.4852015	7.9023393	8.3393381
1960	4,800	4,007.12	5.9278310	6.1654405	6.4669638	6.8443171	7.2025395	7.6039250	8.0244215
1961	4,800	4,086.76	5.8123134	6.0452926	6.3409400	6.7109397	7.0621813	7.4557449	7.8680471
1962	4,800	4,291.40	5.5351470	5.7570164	6.0385655	6.3909214	6.7254136	7.1002097	7.4928508
1963	4,800	4,396.64	5.4026552	5.6192138	5.8940236	6.2379453	6.5644310	6.9302558	7.3134985
1964	4,800	4,576.32	5.1905308	5.3985866	5.6626066	5.9930250	6.3066918	6.6581533	7.0263487
1965	4,800	4,658.72	5.0987245	5.3031004	5.5624506	5.8870248	6.1951437	6.5403888	6.9020718
1966	6,600	4,938.36	4.8100037	5.0028066	5.2474708	5.5536656	5.8443370	6.1700322	6.5112345
1967	6,600	5,213.44	4.5562105	4.7388404	4.9705952	5.2606341	5.5359686	5.8444789	6.1676782
1968	7,800	5,571.76	4.2632005	4.4340855	4.6509361	4.9223226	5.1799503	5.4686203	5.7710346
1969	7,800	5,893.76	4.0302846	4.1918334	4.3968367	4.6533961	4.8969486	5.1698474	5.4557396
1970	7,800	6,186.24	3.8397363	3.9936472	4.1889581	4.4333876	4.6654252	4.9254216	5.1977970
1971	7,800	6,497.08	3.6560316	3.8025790	3.9885456	4.2212809	4.4422171	4.6897745	4.9491187
1972	9,000	7,133.80	3.3297163	3.4631837	3.6325521	3.8445148	4.0457316	4.2711935	4.5073902
1973	10,800	7,580.16	3.1336449	3.2592531	3.4186482	3.6181294	3.8074975	4.0196830	4.2419711
1974	13,200	8,030.76	2.9578184	3.0763788	3.2268303	3.4151189	3.5938616	3.7941415	4.0039573
1975	14,100	8,630.92	2.7521435	2.8624596	3.0024493	3.1776450	3.3439587	3.5303119	3.7255379
1976	15,300	9,226.48	2.5744954	2.6776907	2.8086443	2.9725312	3.1281095	3.3024339	3.4850582
1977	16,500	9,779.44	2.4289254	2.5262858	2.6498348	2.8044551	2.9512365	3.1157040	3.2880022
1978	17,700	10,556.03	2.2502333	2.3404310	2.4548907	2.5981359	2.7341188	2.8864867	3.0461092
1979	22,900	11,479.46	2.0692202	2.1521622	2.2574145	2.3891368	2.5141810	2.6542921	2.8010743
1980	25,900	12,513.46	1.8982384	1.9743268	2.0708821	2.1917200	2.3064316	2.4349652	2.5696186
1981	29,700	13,773.10	1.7246321	1.7937618	1.8814864	1.9912728	2.0954934	2.2122717	2.3346102
1982	32,400	14,531.34	1.6346414	1.7001639	1.7833111	1.8873690	1.9861513	2.0968362	2.2127911
1983	35,700	15,239.24	1.5587083	1.6211871	1.7004719	1.7996960	1.8938897	1.9994330	2.1100015
1984	37,800	16,135.07	1.4721678	1.5311777	1.6060606	1.6997757	1.7887397	1.8884232	1.9928528
1985	39,600	16,822.51	1.4120087	1.4686072	1.5404301	1.6303156	1.7156441	1.8112541	1.9114163
1986	42,000	17,321.82	1.3713068	1.4262739	1.4960264	1.5833209	1.6661898	1.7590438	1.8563188
1987	43,800	18,426.51	1.2890954	1.3407672	1.4063379	1.4883991	1.5662999	1.6535871	1.7450304
1988	45,000	19,334.04	1.2285860	1.2778323	1.3403251	1.4185344	1.4927785	1.5759686	1.6631196
1989	48,000	20,099.55	1.1817941	1.2291648	1.2892776	1.3645082	1.4359245	1.5159464	1.5997781
1990	51,300	21,027.98	1.1296154	1.1748946	1.2323533	1.3042622	1.3725256	1.4490141	1.5291445
1991	53,400	21,811.60	1.0890320	1.1326844	1.1880788	1.2574043	1.3232152	1.3969557	1.4742073
1992	55,500	22,935.42	1.0356702	1.0771837	1.1298638	1.1957924	1.2583785	1.3285059	1.4019721
1993	57,600	23,132.67	1.0268391	1.0679986	1.1202295	1.1855960	1.2476485	1.3171778	1.3900177
1994	60,600	23,753.53	1.0000000	1.0400837	1.0909494	1.1546073	1.2150379	1.2827500	1.3536860
1995	61,200	24,705.66	1.0000000	1.0000000	1.0489054	1.1101100	1.1682117	1.2333141	1.3015163
1996	62,700	25,913.90	1.0000000	1.0000000	1.0000000	1.0583509	1.1137436	1.1758107	1.2408329
1997	65,400	27,426.00	1.0000000	1.0000000	1.0000000	1.0000000	1.0523387	1.1109837	1.1724211
1998	68,400	28,861.44	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0557283	1.1141100
1999	72,600	30,469.84	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0552999
2000	76,200	32,154.82	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2001	80,400	...	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2002	84,900	...	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000

- 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 (column 2) 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 earnings (AIME).

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

NOTE: ... = not available.

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

**Table 2.A9—Indexed earnings for workers with maximum earnings, 1951–2002**

Year	Annual maximum taxable earning (dollars)	Average annual wage (dollars) <sup>a</sup>	Annual maximum indexed earnings <sup>b</sup> for workers who were first eligible (attained age 62, became disabled, or died) in—							
			1995	1996	1997	1998	1999	2000	2001	2002
1951	3,600	2,799.16	29,750.93	30,549.42	31,773.95	33,327.87	35,272.58	37,118.70	39,187.26	41,354.32
1952	3,600	2,973.32	28,008.29	28,760.01	29,912.82	31,375.71	33,206.52	34,944.50	36,891.90	38,932.02
1953	3,600	3,139.44	26,526.26	27,238.20	28,330.01	29,715.50	31,449.43	33,095.45	34,939.81	36,871.97
1954	3,600	3,155.64	26,390.09	27,098.37	28,184.58	29,562.95	31,287.98	32,925.55	34,760.44	36,682.69
1955	4,200	3,301.44	29,428.74	30,218.58	31,429.85	32,966.94	34,890.59	36,716.72	38,762.88	40,906.47
1956	4,200	3,532.36	27,504.90	28,243.11	29,375.20	30,811.80	32,609.70	34,316.45	36,228.85	38,232.30
1957	4,200	3,641.72	26,678.94	27,394.97	28,493.07	29,886.53	31,630.44	33,285.93	35,140.90	37,084.19
1958	4,200	3,673.80	26,445.97	27,155.76	28,244.26	29,625.56	31,354.24	32,995.28	34,834.05	36,760.37
1959	4,800	3,855.80	28,797.35	29,570.24	30,755.53	32,259.64	34,142.02	35,928.97	37,931.23	40,028.82
1960	4,800	4,007.12	27,709.88	28,453.59	29,594.11	31,041.43	32,852.72	34,572.19	36,498.84	38,517.22
1961	4,800	4,086.76	27,169.89	27,899.10	29,017.40	30,436.51	32,212.51	33,898.47	35,787.58	37,766.63
1962	4,800	4,291.40	25,874.26	26,568.71	27,633.68	28,985.11	30,676.42	32,281.99	34,081.01	35,965.68
1963	4,800	4,396.64	25,254.93	25,932.75	26,972.23	28,291.31	29,942.14	31,509.27	33,265.23	35,104.79
1964	4,800	4,576.32	24,263.34	24,914.55	25,913.22	27,180.51	28,766.52	30,272.12	31,959.14	33,726.47
1965	4,800	4,658.72	23,834.19	24,473.88	25,454.88	26,699.76	28,257.72	29,736.69	31,393.87	33,129.94
1966	6,600	4,938.36	30,916.26	31,746.02	33,018.52	34,633.31	36,654.19	38,572.62	40,722.21	42,974.15
1967	6,600	5,213.44	29,285.01	30,070.99	31,276.35	32,805.93	34,720.18	36,537.39	38,573.56	40,706.68
1968	7,800	5,571.76	32,383.81	33,252.96	34,585.87	36,277.30	38,394.12	40,403.61	42,655.24	45,014.07
1969	7,800	5,893.76	30,614.55	31,436.22	32,696.30	34,295.33	36,296.49	38,196.20	40,324.81	42,554.77
1970	7,800	6,186.24	29,167.12	29,949.94	31,150.45	32,673.87	34,580.42	36,390.32	38,418.29	40,542.82
1971	7,800	6,497.08	27,771.68	28,517.05	29,660.12	31,110.66	32,925.99	34,649.29	36,580.24	38,603.13
1972	9,000	7,133.80	29,184.17	29,967.45	31,168.65	32,692.97	34,600.63	36,411.58	38,440.74	40,566.51
1973	10,800	7,580.16	32,958.78	33,843.37	35,199.93	36,921.40	39,075.80	41,120.97	43,412.58	45,813.29
1974	13,200	8,030.76	38,022.71	39,043.20	40,608.20	42,594.16	45,079.57	47,438.97	50,082.67	52,852.24
1975	14,100	8,630.92	37,790.95	38,805.22	40,360.68	42,334.54	44,804.79	47,149.82	49,777.40	52,530.09
1976	15,300	9,226.48	38,360.23	39,389.78	40,968.67	42,972.26	45,479.73	47,860.08	50,527.24	53,321.39
1977	16,500	9,779.44	39,029.75	40,077.27	41,683.72	43,722.27	46,273.51	48,695.40	51,409.12	54,252.04
1978	17,700	10,556.03	38,788.09	39,829.13	41,425.63	43,451.57	45,987.00	48,393.90	51,090.81	53,916.13
1979	22,900	11,479.46	46,146.61	47,385.14	49,284.51	51,694.79	54,711.23	57,574.74	60,783.29	64,144.60
1980	25,900	12,513.46	47,879.34	49,164.37	51,135.07	53,635.85	56,765.55	59,736.58	63,065.60	66,553.12
1981	29,700	13,773.10	49,882.76	51,221.57	53,274.72	55,880.15	59,140.80	62,236.15	65,704.47	69,337.92
1982	32,400	14,531.34	51,578.07	52,962.38	55,085.31	57,779.28	61,150.75	64,351.30	67,937.49	71,694.43
1983	35,700	15,239.24	54,191.44	55,645.89	57,876.38	60,706.85	64,249.15	67,611.86	71,379.76	75,327.06
1984	37,800	16,135.07	54,193.44	55,647.94	57,878.52	60,709.09	64,251.52	67,614.36	71,382.40	75,329.84
1985	39,600	16,822.51	54,454.05	55,915.54	58,156.85	61,001.03	64,560.50	67,939.51	71,725.66	75,692.09
1986	42,000	17,321.82	56,089.50	57,594.89	59,903.50	62,833.11	66,499.48	69,979.97	73,879.84	77,965.39
1987	43,800	18,426.51	54,986.59	56,462.38	58,725.60	61,597.60	65,191.88	68,603.93	72,427.12	76,432.33
1988	45,000	19,334.04	53,841.32	55,286.37	57,502.45	60,314.63	63,834.05	67,175.03	70,918.59	74,840.38
1989	48,000	20,099.55	55,243.43	56,726.12	58,999.91	61,885.33	65,496.39	68,924.38	72,765.43	76,789.35
1990	51,300	21,027.98	56,434.62	57,949.27	60,272.09	63,219.72	66,908.65	70,410.56	74,334.42	78,445.11
1991	53,400	21,811.60	56,634.29	58,154.31	60,485.35	63,443.41	67,145.39	70,659.69	74,597.44	78,722.67
1992	55,500	22,935.42	55,977.31	57,479.69	59,783.69	62,707.44	66,366.48	69,840.01	73,732.08	77,809.45
1993	57,600	23,132.67	57,600.00	59,145.93	61,516.72	64,525.22	68,290.33	71,864.55	75,869.44	80,065.02
1994	60,600	23,753.53	60,600.00	60,600.00	63,029.07	66,111.54	69,969.20	73,631.30	77,734.65	82,033.37
1995	61,200	24,705.66	61,200.00	61,200.00	61,200.00	64,193.01	67,938.73	71,494.55	75,478.83	79,652.80
1996	62,700	25,913.90	62,700.00	62,700.00	62,700.00	62,700.00	66,358.60	69,831.72	73,723.33	77,800.22
1997	65,400	27,426.00	65,400.00	65,400.00	65,400.00	65,400.00	65,400.00	68,822.95	72,658.34	76,676.34
1998	68,400	28,861.44	68,400.00	68,400.00	68,400.00	68,400.00	68,400.00	68,400.00	72,211.82	76,205.13
1999	72,600	30,469.84	72,600.00	72,600.00	72,600.00	72,600.00	72,600.00	72,600.00	72,600.00	76,614.77
2000	76,200	32,154.82	76,200.00	76,200.00	76,200.00	76,200.00	76,200.00	76,200.00	76,200.00	76,200.00
2001	80,400	...	80,400.00	80,400.00	80,400.00	80,400.00	80,400.00	80,400.00	80,400.00	80,400.00
2002	84,900	...	84,900.00	84,900.00	84,900.00	84,900.00	84,900.00	84,900.00	84,900.00	84,900.00

- 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 (column 2) 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 1999, the indexing factor for 1982 is \$27,426.00/14,531.34, or 1.8873690. Multiplication of maximum taxable earnings of \$32,400 for 1982 by this factor gives maximum indexed earnings of \$61,150.75 for 1982.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

NOTE: ... = not available.

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Table 2.A10—Average monthly wage (AMW) and average indexed monthly earnings (AIME)

Year enacted	Earnings measure	Provision
1939 .....	AMW	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 QC.
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 QC. 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 year 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.
1977 .....	AIME	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.
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 who receive less 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 a child under age 3.) However, the number of years of earnings used is at least 2. <i>Effective for 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 newly eligible after 1984.</i>	

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm).

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

**Table 2.A11—Formulas for computing primary insurance amount (PIA) from AIME, increases in PIA based on cost-of-living adjustments, and minimum PIA, for workers who were first eligible (attained age 62, became disabled, or died) in 1979 or later**

Year enacted	Year of first eligibility	Percentage of AIME applicable to PIA			First applicable cost-of-living adjustment		Minimum PIA based on indexed earnings (dollars)
		90 percent of first (dollars)—	Plus 32 percent of next (dollars)—	Plus 15 percent above (dollars)—	Effective for—	Percentage increase	
1977 <sup>a</sup>	b 1979	180	905	1,085	June 1979	9.9	c 122
	b 1980	194	977	1,171	1980	14.3	c 122
1981 <sup>d</sup>	b 1981	211	1,063	1,274	1981	11.2	c 122
	b 1982	230	1,158	1,388	1982	7.4	d
1983	b 1983	254	1,274	1,528	Dec. 1983	3.5	d
	1984	267	1,345	1,612	1984	3.5	d
	1985	280	1,411	1,691	1985	3.1	d
	1986	297	1,493	1,790	1986	1.3	d
	1987	310	1,556	1,866	1987	4.2	d
	1988	319	1,603	1,922	1988	4.0	d
	1989	339	1,705	2,044	1989	4.7	d
	1990	356	1,789	2,145	1990	5.4	d
	1991	370	1,860	2,230	1991	3.7	d
	1992	387	1,946	2,333	1992	3.0	d
	1993	401	2,019	2,420	1993	2.6	d
	1994	422	2,123	2,545	1994	2.8	d
	1995	426	2,141	2,567	1995	2.6	d
	1996	437	2,198	2,635	1996	2.9	d
	1997	455	2,286	2,741	1997	2.1	d
	1998	477	2,398	2,875	1998	1.3	d
	1999	505	2,538	3,043	1999	e 2.5	d
	2000	531	2,671	3,202	2000	3.5	d
	2001	561	2,820	3,381	2001	2.6	d
	2002	592	2,975	3,567	2002	...	d

- a. The 1977 amendments 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 (attained age 62, became disabled, or died) in successive calendar years. The legislation also "froze" the minimum PIA at \$122.
- b. For workers who attained age 62 in the 1979–1983 period, PIA cannot be less than that derived from PIA table in effect in December 1978 (approximated by PIA formula in Table 2.A16) based on 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.
- c. Not subject to automatic adjustments until earlier of year of attainment of age 65 or year of first receipt of benefits.
- d. Minimum PIA eliminated by 1981 legislation for workers who attain age 62 or die after 1981 (after 1991 for members of certain religious orders). 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 by December 1981 legislation that restored the minimum PIA for workers who attained age 62 or died (before attaining age 62) before 1982.
- e. 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 P.L. 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.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

NOTE: ... = not available.

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Table 2.A11.1—Computation of PIA based on Windfall Elimination Provision (WEP)

Year enacted	Effective	Provision																										
1983 .....	1986	<p>Workers first eligible for pensions based on noncovered employment<sup>a</sup> and disability or retired workers after Dec. 31, 1985. The benefit computation formula uses a reduced factor of the usual first AIME bendpoint.</p> <table border="0"> <thead> <tr> <th><i>Factor</i></th> <th><i>Year eligible</i></th> </tr> </thead> <tbody> <tr> <td>80%</td> <td>1986</td> </tr> <tr> <td>70%</td> <td>1987</td> </tr> <tr> <td>60%</td> <td>1988</td> </tr> <tr> <td>50%</td> <td>1989</td> </tr> <tr> <td>40%</td> <td>1990 and later</td> </tr> </tbody> </table> <p>WEP is not applicable to persons who were federal employees or nonprofit employees on Jan. 1, 1984 and who were covered by Social Security on that date; to federal employees who switched to the Federal Employees Retirement System (FERS) during a special enrollment period and who have worked under FERS for 5 years; 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:</p> <table border="0"> <thead> <tr> <th><i>Factor</i></th> <th><i>Years of coverage</i></th> </tr> </thead> <tbody> <tr> <td>80%</td> <td>29</td> </tr> <tr> <td>70%</td> <td>28</td> </tr> <tr> <td>60%</td> <td>27</td> </tr> <tr> <td>50%</td> <td>26</td> </tr> </tbody> </table>	<i>Factor</i>	<i>Year eligible</i>	80%	1986	70%	1987	60%	1988	50%	1989	40%	1990 and later	<i>Factor</i>	<i>Years of coverage</i>	80%	29	70%	28	60%	27	50%	26				
<i>Factor</i>	<i>Year eligible</i>																											
80%	1986																											
70%	1987																											
60%	1988																											
50%	1989																											
40%	1990 and later																											
<i>Factor</i>	<i>Years of coverage</i>																											
80%	29																											
70%	28																											
60%	27																											
50%	26																											
1988 .....	1989	<p>5% added to factor for each year of coverage over 20.</p> <table border="0"> <thead> <tr> <th><i>Factor</i></th> <th><i>Years of coverage</i></th> </tr> </thead> <tbody> <tr> <td>85%</td> <td>29</td> </tr> <tr> <td>80%</td> <td>28</td> </tr> <tr> <td>75%</td> <td>27</td> </tr> <tr> <td>70%</td> <td>26</td> </tr> <tr> <td>65%</td> <td>25</td> </tr> <tr> <td>60%</td> <td>24</td> </tr> <tr> <td>55%</td> <td>23</td> </tr> <tr> <td>50%</td> <td>22</td> </tr> <tr> <td>45%</td> <td>21</td> </tr> </tbody> </table>	<i>Factor</i>	<i>Years of coverage</i>	85%	29	80%	28	75%	27	70%	26	65%	25	60%	24	55%	23	50%	22	45%	21						
<i>Factor</i>	<i>Years of coverage</i>																											
85%	29																											
80%	28																											
75%	27																											
70%	26																											
65%	25																											
60%	24																											
55%	23																											
50%	22																											
45%	21																											
	1991	<p>Earnings required for a year of substantial coverage (decoupled from the definition of a year of coverage for special minimum PIA).<sup>b</sup></p> <table border="0"> <thead> <tr> <th><i>Year</i></th> <th><i>Earnings (dollars)</i></th> </tr> </thead> <tbody> <tr> <td>1991</td> <td>9,900</td> </tr> <tr> <td>1992</td> <td>10,350</td> </tr> <tr> <td>1993</td> <td>10,725</td> </tr> <tr> <td>1994</td> <td>11,250</td> </tr> <tr> <td>1995</td> <td>11,325</td> </tr> <tr> <td>1996</td> <td>11,625</td> </tr> <tr> <td>1997</td> <td>12,150</td> </tr> <tr> <td>1998</td> <td>12,675</td> </tr> <tr> <td>1999</td> <td>13,425</td> </tr> <tr> <td>2000</td> <td>14,175</td> </tr> <tr> <td>2001</td> <td>14,925</td> </tr> <tr> <td>2002</td> <td>15,750</td> </tr> </tbody> </table>	<i>Year</i>	<i>Earnings (dollars)</i>	1991	9,900	1992	10,350	1993	10,725	1994	11,250	1995	11,325	1996	11,625	1997	12,150	1998	12,675	1999	13,425	2000	14,175	2001	14,925	2002	15,750
<i>Year</i>	<i>Earnings (dollars)</i>																											
1991	9,900																											
1992	10,350																											
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1999	13,425																											
2000	14,175																											
2001	14,925																											
2002	15,750																											

a. Reduction in PIA will not be greater than one-half of the periodic payment 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 old law base, while the criterion for computing the special minimum PIA was changed to 15 percent of the base.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, “Cost-of-Living Increase and Other Determinations for 2002,” *Federal Register*, vol. 66, no. 207 (October 25, 2001).

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A12—Special minimum PIA (formula applies to years of coverage)

Year enacted	Years of coverage		PIA computation			
	Applicable period	Number	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)	Effective for—	
1972 .....	1937–1950	The number (disregarding any remainder and not exceeding 14) obtained by dividing total creditable wages in 1937–1950 by \$900	8.50	170.00	January 1973	
	After 1950	Number of years with creditable earnings equal to at least 25% of the effective annual maximum taxable earnings, that is:				
		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 .....	.....	.....	9.00	180.00	March 1974	
1977 <sup>b</sup> .....	After 1978	Number of years with creditable earnings equal to at least 25% 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:	11.50	230.00	January 1979	
		1979 .....	\$4,725	c 12.64	252.80	June 1979
		1980 .....	5,100	c 14.45	289.00	June 1980
		1981 .....	5,500	c 16.07	321.40	June 1981
		1982 .....	6,075	c 17.26	345.10	June 1982
		1983 .....	6,675	c 17.86	357.10	December 1983
		1984 .....	7,050	c 18.49	369.50	December 1984
		1985 .....	7,425	c 19.06	380.90	December 1985
		1986 .....	7,875	c 19.31	385.80	December 1986
		1987 .....	8,175	c 20.12	402.00	December 1987
		1988 .....	8,400	c 20.92	418.00	December 1988
		1989 .....	8,925	c 21.90	437.60	December 1989
		1990 .....	9,525	c 23.08	461.20	December 1990
				c 23.93	478.20	December 1991
				c 24.65	492.50	December 1992
				c 25.29	505.30	December 1993
				c 26.00	519.40	December 1994
				c 26.68	532.90	December 1995
				c 27.45	548.30	December 1996
				c 28.03	559.80	December 1997
				c 28.39	567.00	December 1998
				c <sup>d</sup> 29.10	<sup>d</sup> 581.10	December 1999
				c 30.12	601.40	December 2000
				c 30.90	617.00	December 2001

See footnotes at end of table.



2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A12—Special minimum PIA (formula applies to years of coverage)—Continued

Year enacted	Years of coverage		PIA computation		
	Applicable period	Number	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)	Effective for—
1990 .....	After 1990	Number of years with creditable earnings equal to at least 15% of what the annual taxable maximum would have been if the statutory increases in the maximum under the 1977 amendments had not been enacted <sup>e</sup> (the "old law" contribution and benefit base), that is:	...	...	...
		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		

- a. The amount effective for a given month applies, as of that month, to all workers from the date of entitlement to benefits.
- b. Provision for future automatic cost-of-living increases of amount per year of coverage (and maximum amount), beginning with the June 1979 increase.
- c. 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 PIA's are published yearly in the *Federal Register*.
- d. 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 P.L. 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.
- e. 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.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

NOTES: Alternative PIA applicable when it exceeds the regularly computed PIA. The usual rates of actuarial reduction apply for retirement before age 65. 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.

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

**Table 2.A13—Formulas for computing maximum family benefit from primary insurance amount (PIA), and increases in maximum based on cost-of-living adjustments, for workers who attained age 62 or died (before attaining age 62) in 1979 or later**

Year enacted	Year of first eligibility	Percentage of PIA applicable to maximum family benefit				First applicable cost-of-living adjustment	
		150 percent of first (dollars)—	Plus 272 percent of next (dollars)—	Plus 134 percent of next (dollars)—	Plus 175 percent above (dollars)—	Effective for—	Percentage increase
1977 <sup>a</sup>	1979	230	102	101	433	June 1979	9.9
	1980	248	110	109	467	1980	14.3
	1981	270	120	118	508	1981	11.2
	1982	294	131	129	554	1982	7.4
	1983	324	144	142	610	Dec. 1983	3.5
	1984	342	151	150	643	1984	3.5
	1985	358	159	158	675	1985	3.1
	1986	379	169	166	714	1986	1.3
	1987	396	175	174	745	1987	4.2
	1988	407	181	179	767	1988	4.0
	1989	433	193	190	816	1989	4.7
	1990	455	201	200	856	1990	5.4
	1991	473	209	208	890	1991	3.7
	1992	495	219	217	931	1992	3.0
	1993	513	227	226	966	1993	2.6
	1994	539	240	237	1,016	1994	2.8
	1995	544	241	239	1,024	1995	2.6
	1996	559	247	246	1,052	1996	2.9
	1997	581	258	255	1,094	1997	2.1
	1998	609	271	267	1,147	1998	1.3
	1999	645	286	283	1,214	1999	<sup>b</sup> 2.5
	2000	679	301	298	1,278	2000	3.5
2001	717	317	315	1,349	2001	2.6	
2002	756	336	332	1,424	2002	...	

- 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 levels. As a result, separate formulas are applicable to workers first eligible in successive calendar years.
- b. 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 P.L. 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.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

NOTE: ... = not available.

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**Table 2.A14—Formulas for computing maximum family benefit, and increases in maximum based on cost-of-living adjustments, for workers first eligible for disability benefits in 1979 or later**

Year enacted	Year of first eligibility	Formula for maximum family benefit
1977 <sup>a</sup>	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>
1980 <sup>d</sup>	1979 or later	Smaller of (1) 85% of the AIME (or 100% of PIA, if larger) and (2) 150% of PIA <sup>e</sup>

- 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).

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A16—Formulas for computing primary insurance amount (PIA) from average monthly wage (AMW) based on earnings after 1950, and percentage increases in PIA

Effective for .....	Apr. 1952 a 77.0	Sept. 1952 b 12.5	Sept. 1954 c 13.0	Jan. 1959 d 7.0	Jan. 1965 e 7.0	Feb. 1968 13.0	Jan. 1970 15.0	Jan. 1971 10.0	Sept. 1972 20.0
Percentage increase in PIA .....									
AMW (dollars)	Percentage of AMW applicable to PIA								
First 110 .....	f 50.00	f 55.00	55.00	58.85	62.97	71.16	81.83	90.01	108.01
Next 290 .....	g 15.00	g 15.00	h 20.00	21.40	22.90	25.88	29.76	32.74	39.29
Next 150 .....	...	...	...	...	21.40	24.18	27.81	30.59	36.71
Next 100 .....	...	...	...	...	...	28.43	32.69	35.96	43.15
Next 100 .....	...	...	...	...	...	...	...	20.00	24.00
Next 250 .....	...	...	...	...	...	...	...	...	i 20.00
Effective for .....	June 1974 j 11.0	June 1975 k 8.0	June 1976 6.4	June 1977 5.9	June 1978 6.5	June 1979 9.9	June 1980 14.3	June 1981 11.2	June 1982 7.4
Percentage increase in PIA .....									
AMW (dollars)	Percentage of AMW applicable to PIA								
First 110 .....	119.89	129.48	137.77	145.90	155.38	170.76	195.18	217.04	233.10
Next 290 .....	43.61	47.10	50.10	53.06	56.51	62.10	70.98	78.93	84.77
Next 150 .....	40.75	44.01	46.82	49.58	52.81	58.04	66.34	73.77	79.23
Next 100 .....	47.90	51.73	55.05	58.30	62.09	68.24	78.00	86.74	93.16
Next 100 .....	26.64	28.77	30.61	32.42	34.53	37.95	43.38	48.24	51.81
Next 250 .....	22.20	23.98	25.51	27.02	28.78	31.63	36.15	40.20	43.17
Next 175 .....	l 20.00	21.60	22.98	24.34	25.92	28.49	32.56	36.21	38.89
Next 100 .....	...	20.00	21.28	22.54	24.01	26.39	30.16	33.54	36.02
Next 100 .....	...	...	20.00	21.18	22.56	24.79	28.33	31.50	33.83
Next 100 .....	...	...	...	20.00	21.30	23.41	26.76	29.76	31.96
Next 435 .....	...	...	...	...	20.00	21.98	25.12	27.93	30.00
Next 250 .....	...	...	...	...	...	20.00	22.86	25.42	27.30
Next 315 .....	...	...	...	...	...	...	20.00	22.24	23.89
Next 225 .....	...	...	...	...	...	...	...	20.00	21.48
Next 275 .....	...	...	...	...	...	...	...	...	20.00
Effective for .....	Dec. 1983 3.5	Dec. 1984 3.5	Dec. 1985 3.1	Dec. 1986 1.3	Dec. 1987 4.2	Dec. 1988 4.0	Dec. 1989 4.7	Dec. 1990 5.4	Dec. 1991 3.7
Percentage increase in PIA .....									
AMW (dollars)	Percentage of AMW applicable to PIA								
First 110 .....	241.26	249.70	257.44	260.79	271.74	282.61	295.89	311.87	323.41
Next 290 .....	87.74	90.81	93.62	94.84	98.82	102.77	107.60	113.42	117.62
Next 150 .....	82.00	84.87	87.50	88.64	92.36	96.05	100.56	105.99	109.91
Next 100 .....	96.42	99.79	102.88	104.22	108.60	112.94	118.25	124.64	129.25
Next 100 .....	53.62	55.50	57.22	57.96	60.39	62.81	65.76	69.31	71.87
Next 250 .....	44.68	46.24	47.67	48.29	50.32	52.33	54.79	57.75	59.89
Next 175 .....	40.25	41.66	42.95	43.51	45.34	47.15	49.37	52.04	53.97
Next 100 .....	37.28	38.58	39.78	40.30	41.99	43.67	45.72	48.19	49.97
Next 100 .....	35.01	36.24	37.36	37.85	39.44	41.02	42.95	45.27	46.94
Next 100 .....	33.08	34.24	35.30	35.76	37.26	38.75	40.57	42.76	44.34
Next 435 .....	31.05	32.14	33.14	33.57	34.98	36.38	38.09	40.15	41.64
Next 250 .....	28.26	29.25	30.16	30.55	31.83	33.10	34.66	36.53	37.88
Next 315 .....	24.73	25.60	26.39	26.73	27.85	28.96	30.32	31.96	33.14
Next 225 .....	22.23	23.01	23.72	24.03	25.04	26.04	27.26	28.73	29.79
Next 275 .....	20.70	21.42	22.08	22.37	23.31	24.24	25.38	26.75	27.74
Next 175 .....	20.00	20.70	21.34	21.62	22.53	23.43	24.53	25.85	26.81
Next 150 .....	...	20.00	20.63	20.90	21.78	22.65	23.71	24.99	25.91
Next 200 .....	...	...	20.00	20.26	21.11	21.95	22.98	24.22	25.12
Next 150 .....	...	...	...	20.00	20.84	21.67	22.69	23.92	24.81
Next 100 .....	...	...	...	...	20.00	20.80	21.78	22.96	23.81
Next 250 .....	...	...	...	...	...	20.00	20.94	22.07	22.89
Next 275 .....	...	...	...	...	...	...	20.00	21.08	21.86
Next 175 .....	...	...	...	...	...	...	20.00	21.08	20.74
Next 175 .....	...	...	...	...	...	...	...	...	20.00

See footnotes at end of table.

**Table 2.A16—Formulas for computing primary insurance amount (PIA) from average monthly wage (AMW) based on earnings after 1950, and percentage increases in PIA—Continued**

Effective for .....	Dec. 1992	Dec. 1993	Dec. 1994	Dec. 1995	Dec. 1996	Dec. 1997	Dec. 1998	Dec. 1999	Dec. 2000	Dec. 2001
Percentage increase in PIA .....	3.0	2.6	2.8	2.6	2.9	2.1	1.3	<sup>m</sup> 2.5	3.5	2.6
AMW (dollars)	Percentage of AMW applicable to PIA									
First 110 .....	333.11	341.77	351.34	360.47	370.93	378.72	383.64	393.23	407.00	417.58
Next 290 .....	121.15	124.30	127.78	131.10	134.90	137.73	139.52	143.01	148.02	151.87
Next 150 .....	113.21	116.15	119.40	122.50	126.06	128.71	130.38	133.64	138.32	141.91
Next 100 .....	133.13	136.59	140.41	144.06	148.24	151.35	153.32	157.15	162.65	166.88
Next 100 .....	74.03	75.95	78.08	80.11	82.43	84.16	85.26	87.39	90.45	92.80
Next 250 .....	61.69	63.29	65.06	66.75	68.69	70.13	71.04	72.82	75.37	77.33
Next 175 .....	55.59	57.04	58.64	60.16	61.91	63.21	64.03	65.63	67.93	69.70
Next 100 .....	51.47	52.81	54.29	55.70	57.32	58.52	59.28	60.77	62.89	64.53
Next 100 .....	48.35	49.61	51.00	52.33	53.84	54.97	55.69	57.08	59.08	60.61
Next 100 .....	45.67	46.86	48.17	49.42	50.86	51.93	52.60	53.92	55.81	57.26
Next 435 .....	42.89	44.01	45.24	46.42	47.76	48.76	49.40	50.63	52.40	53.77
Next 250 .....	39.02	40.03	41.15	42.22	43.44	44.35	44.93	46.05	47.66	48.90
Next 315 .....	34.13	35.02	36.00	36.94	38.01	38.81	39.31	40.30	41.71	42.79
Next 225 .....	30.68	31.48	32.36	33.20	34.16	34.88	35.33	36.21	37.48	38.46
Next 275 .....	28.57	29.31	30.13	30.91	31.81	32.48	32.90	33.72	34.90	35.81
Next 175 .....	27.61	28.33	29.12	29.88	30.74	31.39	31.79	32.59	33.73	34.61
Next 150 .....	26.69	27.38	28.15	28.88	29.72	30.34	30.74	31.51	32.61	33.46
Next 200 .....	25.87	26.54	27.28	27.99	28.80	29.40	29.79	30.53	31.60	32.42
Next 150 .....	25.55	26.21	26.94	27.64	28.44	29.04	29.41	30.15	31.21	32.02
Next 100 .....	24.52	25.16	25.86	26.53	27.30	27.87	28.24	28.94	29.95	30.73
Next 250 .....	23.58	24.19	24.87	25.52	26.26	26.81	27.16	27.84	28.81	29.56
Next 275 .....	22.52	23.11	23.76	24.38	25.08	25.61	25.94	26.59	27.52	28.23
Next 175 .....	21.36	21.92	22.53	23.12	23.79	24.29	24.61	25.22	26.10	26.78
Next 175 .....	20.60	21.14	21.73	22.29	22.94	23.42	23.73	24.32	25.17	25.82
Next 175 .....	20.00	20.52	21.09	21.64	22.27	22.74	23.03	23.61	24.44	25.07
Next 250 .....	...	20.00	20.56	21.09	21.71	22.17	22.45	23.02	23.82	24.44
Next 50 .....	...	...	20.00	20.52	21.12	21.56	21.84	22.39	23.17	23.78
Next 125 .....	...	...	...	20.00	20.58	21.01	21.29	21.82	22.58	23.17
Next 225 .....	...	...	...	...	20.00	20.42	20.69	21.20	21.94	22.52
Next 250 .....	...	...	...	...	...	20.00	20.26	20.77	21.49	22.05
Next 350 .....	...	...	...	...	...	...	20.00	20.50	21.22	21.77
Next 300 .....	...	...	...	...	...	...	...	20.00	20.70	21.24
Next 350 .....	...	...	...	...	...	...	...	...	20.00	20.52
Next 375 .....	...	...	...	...	...	...	...	...	...	20.00

a. Average increase in benefits of about 77 percent—from 100 percent at the lowest level to 50 percent at the highest level.

b. Increase of 12.5 percent or \$5, if larger.

c. Average increase of about 13 percent, with minimum increase of \$5.

d. Increase of 7 percent or \$3, if larger.

e. Increase of 7 percent or \$4, if larger.

f. Applied to first \$100 of AMW.

g. Applied to next \$200 of AMW.

h. Applied to next \$190 before 1955 and to next \$240 effective for January 1955.

i. Applied to next \$150 effective for January 1973 and to next \$350 effective for January 1974.

j. Increase effective in two steps: 7 percent for March–May and other 4 percent for June.

k. Beginning June 1975 all benefit increases are based on automatic cost-of-living adjustments

l. Applied to next \$100 before January 1975.

m. 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 P.L. 106–554, benefits will be 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.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm).

Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

NOTE: ... = not applicable.

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

**Table 2.A17—Minimum primary insurance amount (PIA) and maximum family benefit for workers who attained age 62, were first eligible for disabled-worker benefits, or died before 1979**

Year enacted	Effective for—	Minimum PIA <sup>a</sup> (dollars)	Maximum family benefit	
			Percentage of AMW	But 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	...	150% of PIA
1965	January 1965	44.00	80% of first \$370 + 40% of next \$180	...
1967	February 1968	55.00	80% of first \$436 + 40% of next \$214	...
1969	January 1970	64.00	...	...
1971	January 1971	70.40	88% of first \$436 + 44% of next \$191 <sup>b</sup>	...
1972	September 1972	84.50	105.6% of first \$436 + 52.8% of next \$191 <sup>b</sup>	...
1973 <sup>c</sup>	June 1974	89.50	111.8% of first \$436 + 55.9% of next \$191 <sup>b</sup>	...
1973 <sup>d</sup>	March 1974	90.50	113.0% of first \$436 + 56.5% of next \$191 <sup>b</sup>	...
	June 1974	93.80	117.2% of first \$436 + 58.6% of next \$191 <sup>b</sup>	...
	June 1975	101.40	126.6% of first \$436 + 63.3% of next \$191 <sup>b</sup>	...
	June 1976	107.90	134.7% of first \$436 + 67.3% of next \$191 <sup>b</sup>	...
	June 1977	114.30	142.6% of first \$436 + 71.3% of next \$191 <sup>b</sup>	...
	June 1978	121.80	151.9% of first \$436 + 76.0% of next \$191 <sup>b</sup>	...
	June 1979	133.90	167.0% of first \$436 + 83.5% of next \$191 <sup>b</sup>	...
	June 1980	153.10	190.9% of first \$436 + 95.4% of next \$191 <sup>b</sup>	...
1981 <sup>e</sup>	June 1981	170.30	212.2% of first \$436 + 106.1% of next \$191 <sup>b</sup>	...
	March 1982	f	...	...
1981	June 1982	182.90	227.9% of first \$436 + 114.0% of next \$191 <sup>b</sup>	...
	December 1983	189.30	235.9% of first \$436 + 118.0% of next \$191 <sup>b</sup>	...
	December 1984	195.90	244.2% of first \$436 + 122.1% of next \$191 <sup>b</sup>	...
	December 1985	201.90	251.8% of first \$436 + 125.9% of next \$191 <sup>b</sup>	...
	December 1986	204.50	255.1% of first \$436 + 127.5% of next \$191 <sup>b</sup>	...
	December 1987	213.00	265.8% of first \$436 + 132.9% of next \$191 <sup>b</sup>	...
	December 1988	221.50	276.4% of first \$436 + 138.2% of next \$191 <sup>b</sup>	...
	December 1989	231.90	289.4% of first \$436 + 144.7% of next \$191 <sup>b</sup>	...
	December 1990	244.40	305.0% of first \$436 + 152.5% of next \$191 <sup>b</sup>	...
	December 1991	253.40	316.3% of first \$436 + 158.1% of next \$191 <sup>b</sup>	...
	December 1992	261.00	325.8% of first \$436 + 162.8% of next \$191 <sup>b</sup>	...
	December 1993	267.70	334.3% of first \$436 + 167.0% of next \$191 <sup>b</sup>	...
	December 1994	275.10	343.7% of first \$436 + 171.7% of next \$191 <sup>b</sup>	...
	December 1995	282.20	352.6% of first \$436 + 176.2% of next \$191 <sup>b</sup>	...
	December 1996	290.30	362.8% of first \$436 + 181.3% of next \$191 <sup>b</sup>	...
	December 1997	296.30	370.4% of first \$436 + 185.1% of next \$191 <sup>b</sup>	...
	December 1998	300.10	375.2% of first \$436 + 187.5% of next \$191 <sup>b</sup>	...
December 1999 <sup>g</sup>	307.60	384.6% of first \$436 + 192.2% of next \$191 <sup>b</sup>	...	
December 2000	318.30	398.1% of first \$436 + 198.9% of next \$191 <sup>b</sup>	...	
December 2001	326.50	408.5% of first \$436 + 204.1% of next \$191 <sup>b</sup>	...	

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 1973 legislation.

d. Beginning in 1975, minimum PIA and percentages in maximum family benefit formula subject to automatic cost-of-living increases. (Superseded 1972 legislation for automatic increases beginning in 1974.)

e. Superseded by 1981 legislation that restored the minimum PIA for these groups.

f. Minimum PIA eliminated by 1981 legislation.

g. 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 P.L. 106-554, benefits was 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.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

NOTE: ... = not applicable.

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

**Table 2.A18—Automatic adjustment provisions**

Year enacted	Adjustment of—	Provision
1977 .....	Quarter of coverage	Mandatory annual determination, beginning in 1978, as to whether or not 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 column 2 in 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.
1972 .....	Maximum amount of taxable and creditable earnings	<p>The 1972 Act (as modified by the 1973 legislation) mandated a determination in 1974, and in every subsequent year in which a cost-of-living benefit increase is established, as to whether or not an adjustment is required in the maximum amount of annual earnings that will be taxed and credited toward benefits.</p> <p>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 column 2 in 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.</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 Jan. 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.
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 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 sections 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 column 2 in 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.
1977 .....	Benefits—Computation	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 column 2 in 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.
1972 .....	Benefits— Cost-of-living increase	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 increased by the same percentage, effective for June of the year in which the determination was made.
1983 .....		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.

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

**Table 2.A18—Automatic adjustment provisions—Continued**

Year enacted	Adjustment of—	Provision
		<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 column 2 in Table 2.A8 for the annual amount of the average wage after 1950 and footnote 1 in Table 2.A8 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 Oct. 21, 1986).
2001 .....		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 P.L. 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.
1972 .....	Earnings test	<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 or not 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 column 2 in 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 Jan. 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 6 in Table 2.A29) 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 column 2 in Table 2.A8 for annual amounts of the national average wage index.) 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 Mar. 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 index as under the 1994 legislation.
2000 .....		Public Law 106–182, enacted Apr. 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, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

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

**Table 2.A19—Cumulative effect of statutory and automatic increases in benefits: 100 dollar base benefit**

Base dates/ COLA	Illustrated benefit growth (Cost-of-living adjustment (COLA) increases only. Rounded to nearest dollar)												
	Aug. 1950 ...	Sept. 1950 77.0	Sept. 1952 12.5	Sept. 1954 13.0	Jan. 1959 7.0	Jan. 1965 7.0	Feb. 1968 13.0	Jan. 1970 15.0	Jan. 1971 10.0	Sept. 1972 20.0	June 1974 11.0	June 1975 8.0	June 1976 6.4
Aug. 1950.....	<b>100</b>	177	199	225	241	258	291	335	368	442	491	530	564
Sept. 1950.....	...	<b>100</b>	113	127	136	146	164	189	208	250	277	299	318
Sept. 1952.....	...	...	<b>100</b>	113	121	129	146	168	185	222	246	266	283
Sept. 1954.....	...	...	...	<b>100</b>	107	114	129	149	164	196	218	235	250
Jan. 1959.....	...	...	...	...	<b>100</b>	107	121	139	153	184	204	220	234
Jan. 1965.....	...	...	...	...	...	<b>100</b>	113	130	143	172	190	206	219
Feb. 1968.....	...	...	...	...	...	...	<b>100</b>	115	127	152	168	182	194
Jan. 1970.....	...	...	...	...	...	...	...	<b>100</b>	110	132	147	158	168
Jan. 1971.....	...	...	...	...	...	...	...	...	<b>100</b>	120	133	144	153
Sept. 1972.....	...	...	...	...	...	...	...	...	...	<b>100</b>	111	120	128
June 1974.....	...	...	...	...	...	...	...	...	...	...	<b>100</b>	108	115
June 1975.....	...	...	...	...	...	...	...	...	...	...	...	<b>100</b>	106
June 1976.....	...	...	...	...	...	...	...	...	...	...	...	...	<b>100</b>
	June 1977 5.9	June 1978 6.5	June 1979 9.9	June 1980 14.3	June 1981 11.2	June 1982 7.4	Dec. 1983 3.5	Dec. 1984 3.5	Dec. 1985 3.1	Dec. 1986 1.3	Dec. 1987 4.2	Dec. 1988 4.0	Dec. 1989 4.7
Aug. 1950.....	597	636	699	799	888	954	987	1,022	1,053	1,067	1,112	1,156	1,211
Sept. 1950.....	337	359	395	451	502	539	558	577	595	603	628	653	684
Sept. 1952.....	300	319	351	401	446	479	496	513	529	536	558	581	608
Sept. 1954.....	265	283	310	355	395	424	439	454	468	474	494	514	538
Jan. 1959.....	248	264	290	332	369	396	410	424	437	443	462	480	503
Jan. 1965.....	232	247	271	310	345	370	383	397	409	414	432	449	470
Feb. 1968.....	205	218	240	274	305	328	339	351	362	367	382	397	416
Jan. 1970.....	178	190	209	239	265	285	295	305	315	319	332	345	362
Jan. 1971.....	162	173	190	217	241	259	268	277	286	290	302	314	329
Sept. 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.....	<b>100</b>	107	117	134	149	160	165	171	176	179	186	194	203
June 1978.....	...	<b>100</b>	110	126	140	150	155	161	166	168	175	182	190
June 1979.....	...	...	<b>100</b>	114	127	137	141	146	151	153	159	166	173
June 1980.....	...	...	...	<b>100</b>	111	119	124	128	132	134	139	145	152
June 1981.....	...	...	...	...	<b>100</b>	107	111	115	119	120	125	130	136
June 1982.....	...	...	...	...	...	<b>100</b>	104	107	110	112	117	121	127
Dec. 1983.....	...	...	...	...	...	...	<b>100</b>	104	107	108	113	117	123
Dec. 1984.....	...	...	...	...	...	...	...	<b>100</b>	103	104	109	113	118
Dec. 1985.....	...	...	...	...	...	...	...	...	<b>100</b>	101	106	110	115
Dec. 1986.....	...	...	...	...	...	...	...	...	...	<b>100</b>	104	108	113
Dec. 1987.....	...	...	...	...	...	...	...	...	...	...	<b>100</b>	104	109
Dec. 1988.....	...	...	...	...	...	...	...	...	...	...	...	<b>100</b>	105
Dec. 1989.....	...	...	...	...	...	...	...	...	...	...	...	...	<b>100</b>

See footnotes at end of table.



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

**Table 2.A19—Cumulative effect of statutory and automatic increases in benefits: 100 dollar base benefit—  
Continued**

Base dates/ COLA	Illustrated benefit growth (Cost-of-living adjustment (COLA) increases only. Rounded to nearest dollar)											
	Dec. 1990 5.4	Dec. 1991 3.7	Dec. 1992 3.0	Dec. 1993 2.6	Dec. 1994 2.8	Dec. 1995 2.6	Dec. 1996 2.9	Dec. 1997 2.1	Dec. 1998 1.3	Dec. 1999 2.5 <sup>a</sup>	Dec. 2000 3.5	Dec. 2001 2.6
Aug. 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
Sept. 1950.....	721	748	770	790	812	833	857	875	887	909	941	965
Sept. 1952.....	641	665	684	702	722	741	762	778	788	808	836	858
Sept. 1954.....	567	588	606	621	639	655	674	689	698	715	740	759
Jan. 1959.....	530	550	566	581	597	613	630	644	652	668	692	710
Jan. 1965.....	495	514	529	543	558	573	589	601	609	625	646	663
Feb. 1968.....	438	455	468	480	494	507	521	532	539	553	572	587
Jan. 1970.....	381	395	407	418	429	441	453	463	469	481	497	510
Jan. 1971.....	347	359	370	380	390	401	412	421	426	437	452	464
Sept. 1972.....	289	299	308	316	325	334	343	351	355	364	377	387
June 1974.....	260	270	278	285	293	301	309	316	320	328	339	348
June 1975.....	241	250	257	264	271	278	286	292	296	304	314	323
June 1976.....	226	235	242	248	255	262	269	275	278	285	295	303
June 1977.....	214	222	228	234	241	247	254	260	263	270	279	286
June 1978.....	201	208	214	220	226	232	239	244	247	253	262	269
June 1979.....	183	189	195	200	206	211	217	222	225	230	238	245
June 1980.....	160	166	171	175	180	185	190	194	197	201	209	214
June 1981.....	144	149	153	157	162	166	171	174	177	181	188	192
June 1982.....	134	139	143	147	151	155	159	162	165	169	175	179
Dec. 1983.....	129	134	138	142	146	149	154	157	159	163	169	173
Dec. 1984.....	125	130	133	137	141	144	149	152	154	157	163	167
Dec. 1985.....	121	126	129	133	136	140	144	147	149	153	158	162
Dec. 1986.....	120	124	128	131	135	138	142	145	147	151	156	160
Dec. 1987.....	115	119	123	126	129	133	137	139	141	145	150	154
Dec. 1988.....	110	114	118	121	124	128	131	134	136	139	144	148
Dec. 1989.....	105	109	113	116	119	122	125	128	130	133	138	141
Dec. 1990.....	<b>100</b>	104	107	110	113	116	119	121	123	126	131	134
Dec. 1991.....	...	<b>100</b>	103	106	109	111	115	117	119	122	126	129
Dec. 1992.....	...	...	<b>100</b>	103	105	108	111	114	115	118	122	125
Dec. 1993.....	...	...	...	<b>100</b>	103	105	109	111	112	115	119	122
Dec. 1994.....	...	...	...	...	<b>100</b>	103	106	108	109	112	116	119
Dec. 1995.....	...	...	...	...	...	<b>100</b>	103	105	106	109	113	116
Dec. 1996.....	...	...	...	...	...	...	<b>100</b>	102	103	106	110	113
Dec. 1997.....	...	...	...	...	...	...	...	<b>100</b>	101	104	107	110
Dec. 1998.....	...	...	...	...	...	...	...	...	<b>100</b>	103	106	109
Dec. 1999.....	...	...	...	...	...	...	...	...	...	<b>100</b>	104	106
Dec. 2000.....	...	...	...	...	...	...	...	...	...	...	<b>100</b>	103
Dec. 2001.....	...	...	...	...	...	...	...	...	...	...	...	<b>100</b>

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 P.L. 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.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm).

Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol.66, no. 207 (October 25, 2001).

NOTE: ... = not applicable.

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## 2.A OASDI: Benefits Types and Levels

**Table 2.A20—Monthly benefits for retired and disabled workers**

Type of benefit	Year enacted	Age	Percent of PIA	Condition or qualification																																
Retired worker	1935	65 or older	...	<i>Fully insured.</i> Amount based on cumulative wages.																																
	1939	...	100	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	100% of PIA payable at:	...	Applicable to workers who attain age 62 in year:																																
		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 border="1"> <thead> <tr> <th>Age 62 in years—</th> <th>Rate of increase</th> <th>Annual rate</th> </tr> </thead> <tbody> <tr> <td>1987–1988 .....</td> <td>7/24 of 1%</td> <td>3 1/2%</td> </tr> <tr> <td>1989–1990 .....</td> <td>1/3 of 1%</td> <td>4%</td> </tr> <tr> <td>1991–1992 .....</td> <td>9/24 of 1%</td> <td>4 1/2%</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 1/2%</td> </tr> <tr> <td>1997–1998 .....</td> <td>1/2 of 1%</td> <td>6%</td> </tr> <tr> <td>1999–2000 .....</td> <td>13/24 of 1%</td> <td>6 1/2%</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 1/2%</td> </tr> <tr> <td>2005 and later .....</td> <td>2/3 of 1%</td> <td>8%</td> </tr> </tbody> </table>	Age 62 in years—	Rate of increase	Annual rate	1987–1988 .....	7/24 of 1%	3 1/2%	1989–1990 .....	1/3 of 1%	4%	1991–1992 .....	9/24 of 1%	4 1/2%	1993–1994 .....	10/24 of 1%	5%	1995–1996 .....	11/24 of 1%	5 1/2%	1997–1998 .....	1/2 of 1%	6%	1999–2000 .....	13/24 of 1%	6 1/2%	2001–2002 .....	14/24 of 1%	7%	2003–2004 .....	15/24 of 1%	7 1/2%	2005 and later .....	2/3 of 1%	8%
Age 62 in years—	Rate of increase	Annual rate																																		
1987–1988 .....	7/24 of 1%	3 1/2%																																		
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2003–2004 .....	15/24 of 1%	7 1/2%																																		
2005 and later .....	2/3 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).																																	
Disabled worker	1956	50–64	100	<i>Disability insured.</i> 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, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm).

NOTE: ... = not applicable.

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Table 2.A21—Monthly benefits for spouses and children of retired and disabled workers

Type of benefit	Year enacted	Age	Percent of PIA	Condition or qualification	
Wife .....	1939	65 or older	50	<i>Fully insured.</i>	
	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.	
	Divorced wife .....	1965	65 or older	50	<i>Fully insured.</i> 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.		
Wife (mother) .....	1950	Under 65	50	<i>Fully insured.</i> 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.	
	Child .....	1939	Under 18	50	<i>Fully insured.</i> <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.	

See footnotes at end of table.

## 2.A OASDI: Benefits Types and Levels

**Table 2.A21—Monthly benefits for spouses and children of retired and disabled workers—Continued**

Type of benefit	Year enacted	Age	Percent of PIA	Condition or qualification
Child (continued) .....		...	...	Includes grandchild under certain circumstances.
	1981	18–22	...	Student benefits eliminated (to be phased out gradually for those entitled before May 1982), except for elementary or secondary school students under age 19.
	1996	...	...	Stepchildren must be dependent on worker.
Disabled child .....	1956	18 or older	50	<i>Fully insured</i> . <sup>a</sup> Disabled before age 18.
	1972	...	...	Disabled before age 22.
Husband .....		...	...	Includes grandchild under certain circumstances.
	1950	65 or older	50	<i>Fully and currently insured</i> . Dependent.
	1961	62–64	...	Reduced 25/36 of 1% for each month under age 65.
	1967	...	...	<i>Currently insured</i> 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.
Divorced husband .....	1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
	1977 <sup>b</sup>	65 or older	50	<i>Fully insured</i> . 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.	
Husband (father) .....	1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
	1978 <sup>c</sup>	Under 65	50	<i>Fully insured</i> . 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.

a. Under 1939 Act, generally not available to child of married female worker. Under 1950 Act, available if female worker is *fully and currently insured*. Currently insured requirement eliminated by 1967 Act.

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*, Dec. 29, 1978. Statutory change enacted in 1983.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm).

NOTE: ... = not applicable.

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

Type of benefit	Year enacted	Age	Percent of PIA	Condition or qualification
Widow.....	1939	65 or older	75	<i>Fully insured.</i>
	1956	62–64	...	...
	1961	...	82 1/2	...
	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.
		100% of PIA payable at:	...	Applicable to widows who attain age 60 in year:
		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.	
Disabled widow .....	1967	50–59	82 1/2	<i>Fully insured.</i> Reduced 13 1/3%, plus 43/198 of 1% for each month under age 60. Includes divorced wife, dependent and married 20 years.
		...	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.
1984	...	...	Additional reduction for each month under age 60 eliminated.	
Surviving divorced wife.....	1965	60 or older	82 1/2	<i>Fully insured.</i> Dependent. Married 20 years. Not counted toward family maximum. Reduced 5/9 of 1% for each month under age 62.
		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.
	1972	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.
		...	...	Dependency requirement eliminated.
	1977	...	...	Increased by any delayed retirement increment former husband would be receiving.

See footnotes at end of table.

2.A OASDI: Benefit Types and Levels

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

Type of benefit	Year enacted	Age	Percent of PIA	Condition or qualification
Surviving divorced wife (continued) .....	...	...	...	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 increased gradually (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.
Disabled surviving divorced wife .....	1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
	1967	50–59	82 1/2	<i>Fully insured.</i> 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.
Widowed mother .....	1939	Under 65	75	<i>Fully or currently insured.</i> 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.
	1950	Under 65	75	<i>Fully or currently insured.</i> Caring for eligible child. Dependent. Not counted toward family maximum.
	1965	...	...	Eligible child excludes student over age 18.
	1972	...	...	Dependency requirement eliminated.
Surviving divorced mother .....	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.
	1939	Under 18	50	<i>Fully or currently insured.</i> <sup>a</sup> Student aged 16–17
	1946	...	...	Student requirement eliminated.
	1950	...	...	Plus 25% of PIA divided among the children.
	Child .....	1950	...	...

See footnotes at end of table.

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

Type of benefit	Year enacted	Age	Percent of PIA	Condition or qualification
Child (continued) .....	1960	...	75	Additional 25% of PIA eliminated.
	1965	...	...	Full-time student.
	1972	...	...	Benefits extended to end of quarter or semester in which 22nd birthday occurs while undergraduate student.
		...	...	Includes grandchild under certain circumstances.
	1981	18–22	...	Student category eliminated (to be phased out gradually for those entitled before May 1982), except for elementary or secondary school students under age 19.
Disabled child .....	1996	...	...	Stepchildren must be dependent on worker.
	1956	18 or older	50	<i>Fully or currently insured.</i> <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.
Parent .....		...	...	Includes grandchild under certain circumstances.
	1939	65 or older	50	<i>Fully insured.</i> 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.
Widower .....	1961	62 or older	82 1/2	75% each if two parents.
	1950	65 or older	75	Fully and currently insured. Dependent.
	1961	62 or older	82 1/2	...
	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 increased gradually (see Widow).
Disabled 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.
	1967	50–61	82 1/2	<i>Fully insured.</i> 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.
	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.

See footnotes at end of table.

## 2.A OASDI: Benefit Types and Levels

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

Type of benefit	Year enacted	Age	Percent of PIA	Condition or qualification
Disabled widower (continued) .....	...	...	...	Additional reduction for each month under age 60 eliminated.
	1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
Surviving divorced husband.....	1980 <sup>b</sup>	65 or older	100	<i>Fully insured.</i> 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 50% of PIA is payable will be gradually increased (see Retired-Worker).
	1984	62–66	...	Reduced 24/36 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.
1980 <sup>b</sup>		50–59	100	<i>Fully insured.</i> 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).
Disabled surviving divorced husband.....	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	...	...	Additional reduction for each month under age 60 eliminated.
Widowed father .....	1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
	1975 <sup>c</sup>	Under 65	75	<i>Fully or currently insured.</i> 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.
Surviving divorced father...	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.
	1979 <sup>d</sup>	Under 65	75	<i>Fully or currently insured.</i> 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.

a. Under 1939 Act, generally not available to child of married female worker. Under 1950 Act, available if female worker is fully and currently insured; currently insured requirement eliminated by 1967 Act.

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*, Mar. 19, 1975. Statutory change enacted in 1983.

d. Western District Court decision in *Yates v. Califano*, Jan. 28, 1979. Statutory change enacted in 1983.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm).

NOTE: ... = not applicable.

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**Table 2.A23—Monthly benefits for transitionally insured workers and their spouses and surviving spouses, aged 72 before 1969**

Year enacted	Type of benefit	Amount	Effective for—
1965.....	Worker	\$35.00	September 1965
		Same as benefit for individual receiving special age-72 benefits (see table 2.A24)	October 1966
	Wife	One-half of worker's benefit	September 1963
	Widow	Same as worker's benefit	September 1963
1983.....	Husband	One-half of worker's benefit	May 1983
	Widower	Same as worker's benefit	May 1983

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm).

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## 2.A OASDI: Benefits Types and Levels

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

Year enacted	Age	Amount <sup>a</sup> (dollars)		Effective for—
		Individual	Couple	
1966 .....	72	35.00	52.50	October 1966
1967 .....	...	40.00	60.00	February 1968
1969 .....	...	46.00	69.00	January 1970
1971 .....	...	48.30	72.50	January 1971
1972 <sup>b</sup> .....	...	58.00	87.00	September 1972
1973 <sup>c</sup> .....	...	61.50	92.30	June–December 1974
1973 <sup>d</sup> .....	...	62.10	93.20	March 1974
	...	64.40	96.60	June 1974
	...	69.50	104.40	June 1975
	...	74.10	111.20	June 1976
	...	78.50	117.80	June 1977
	...	83.70	125.60	June 1978
	...	92.00	138.10	June 1979
	...	105.20	157.90	June 1980
	...	117.00	175.70	June 1981
	...	125.60	188.60	June 1982
	1983 <sup>e</sup> .....	...	129.90	...
...		134.40	...	December 1984
...		138.50	...	December 1985
...		140.30	...	December 1986
...		146.10	...	December 1987
...		151.90	...	December 1988
...		159.00	...	December 1989
1990 .....	72 before 1972 <sup>f</sup>	167.50	...	December 1990
	...	173.60	...	December 1991
	...	178.80	...	December 1992
	...	183.40	...	December 1993
	...	188.50	...	December 1994
	...	193.40	...	December 1995
	...	199.00	...	December 1996
	...	203.10	...	December 1997
	...	205.70	...	December 1998
	...	210.80	...	<sup>g</sup> December 1999
	...	218.10	...	December 2000
...	223.70	...	December 2001	

- a. Monthly benefit reduced by amount of any government pension excluding workers' compensation benefits and veterans' compensation for service-connected disability or death. Not available for persons receiving assistance.
- b. Provision for future automatic cost-of-living adjustments.
- c. Suspended by 1973 legislation.
- d. Beginning June 1975, subject to automatic cost-of-living adjustments. Benefits no longer available to persons receiving payments under Supplemental Security Income program.
- e. Separate rate for couples eliminated. Rate for individuals applied to all beneficiaries.
- f. Effective for applications after Nov. 5, 1990.
- g. 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 P.L. 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.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

NOTE: ... = not applicable.

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Table 2.A25—Lump-sum benefits and vocational rehabilitation services

Year enacted	Type of benefit	Provision
1935 .....	Lump-sum refund	Persons not insured at age 65 eligible for lump-sum refund equal to 3 1/2 percent of cumulative wage credits.
1939 .....		Lump-sum refund eliminated.
1935 .....	Lump-sum death payment	Under age 65: 3 1/2 percent of cumulative wage credits. Aged 65 or older and fully insured: 3 1/2 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. Amount of lump sum fixed at \$255.
1965 .....		Vocational rehabilitation services
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, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm).

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## 2.A OASDI: Benefit Types and Levels

**Table 2.A26—Monthly benefit amount for selected beneficiary families with first eligibility in 2001, by average indexed monthly earnings for selected wage levels, effective December 2001 (in dollars)**

Beneficiary family	Worker with yearly earnings equal to—				
	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.....	1,204.00	1,907.00	2,543.00	3,704.00	5,126.00
Primary insurance amount.....	729.00	959.90	1,168.70	1,493.50	1,712.30
Maximum family benefit.....	1,093.60	1,713.40	2,132.50	2,612.70	2,995.70
Monthly benefit amount					
Retired worker claiming benefits at age 62					
Worker alone.....	571.00	751.00	915.00	1,169.00	1,341.00
Worker with spouse claiming benefits at—					
Age 65 or older.....	935.00	1,230.00	1,499.00	1,915.00	2,197.00
Age 62.....	838.00	1,102.00	1,343.00	1,716.00	1,968.00
<b>Survivor families<sup>e</sup></b>					
Average indexed monthly earnings.....	993.00	1,912.00	2,549.00	3,824.00	6,192.00
Primary insurance amount.....	659.80	961.50	1,170.60	1,512.00	1,876.40
Maximum family benefit.....	989.60	1,717.90	2,135.20	2,645.00	3,282.70
Monthly benefit amount					
Survivor of worker deceased at age 40					
1 surviving child.....	494.00	721.00	877.00	1,134.00	1,407.00
Widowed mother or father and 1 child.....	988.00	1,442.00	1,754.00	2,268.00	2,814.00
Widowed mother or father and 2 children.....	987.00	1,716.00	2,133.00	2,643.00	3,282.00
<b>Disabled-worker families<sup>f</sup></b>					
Average indexed monthly earnings.....	1,111.00	1,908.00	2,545.00	3,817.00	5,914.00
Primary insurance amount.....	698.60	960.20	1,169.30	1,510.90	1,833.60
Maximum family benefit <sup>g</sup> .....	968.80	1,440.20	1,753.90	2,266.40	2,750.50
Monthly benefit amount:					
Disabled worker age 50					
Worker alone.....	698.00	960.00	1,169.00	1,510.00	1,833.00
Worker, spouse, and 1 child.....	968.00	1,440.00	1,753.00	2,264.00	2,749.00

- 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, column 2.  
c. See Table 2.A9, column 1.  
d. Assumes the worker began to work at age 22, retired at age 62 in 2001 with maximum reduction, and had no prior period of disability.  
e. Assumes the deceased worker began to work at age 22, died in 2001 at age 40, had no earnings in that year, and had no prior period of disability.  
f. Assumes the worker began to work at age 22, became disabled at age 50 in 2001, had no earnings in that year, and had no prior period of disability.  
g. The 1980 Amendments 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 AIME (or 100 percent of the PIA, if larger) or (2) 150 percent of the PIA.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

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**Table 2.A27—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 62, 1957–2002 (in dollars)**

Year of attainment of age 62 <sup>a</sup>	Minimum benefit		Maximum benefit			
	Payable at time of retirement	Payable effective December 2001 <sup>b</sup>	Payable at time of retirement		Payable effective December 2001 <sup>b</sup>	
			Men	Women	Men	Women
1957	24.00	307.50	...	86.80	...	758.00
1958	24.00	307.50	...	86.80	...	758.00
1959	26.40	307.50	...	92.80	...	758.00
1960	26.40	306.20	...	95.20	...	777.60
1961	26.40	304.50	...	96.00	...	783.20
1962	32.00	303.60	93.60	96.80	763.90	790.10
1963	32.00	302.00	94.40	97.60	769.10	795.30
1964	32.00	302.00	95.20	98.40	774.00	800.50
1965	35.20	301.60	102.80	105.40	778.30	798.80
1966	35.20	299.10	102.80	106.20	775.60	801.60
1967	35.20	297.30	105.40	108.80	792.90	817.90
1968	<sup>c</sup> 44.00	293.40	<sup>c</sup> 121.00	<sup>c</sup> 124.80	796.90	822.90
1969	44.00	290.60	124.80	128.40	814.20	837.90
1970	51.20	286.40	146.80	151.90	821.90	850.30
1971	56.40	282.60	163.60	170.50	820.80	856.00
1972	56.40	278.60	167.10	172.90	827.30	855.80
1973	67.60	274.80	207.60	212.90	842.80	865.10
1974	67.60	270.40	217.00	219.70	868.80	879.00
1975	75.10	266.80	253.10	253.10	899.40	899.40
1976	81.20	263.70	285.60	285.60	928.60	928.60
1977	86.40	261.70	319.40	319.40	969.50	969.50
1978	91.50	260.50	354.60	354.60	1,014.00	1,014.00
1979	97.60	261.60	<sup>d</sup> 388.90	<sup>d</sup> 388.90	1,044.30	1,044.30
1980	97.60	237.70	<sup>d</sup> 402.80	<sup>d</sup> 402.80	984.10	984.10
1981	97.60	207.60	432.00	432.00	923.00	923.00
1982	<sup>e</sup>	<sup>e</sup>	474.60	474.60	912.20	912.20
1983	<sup>e</sup>	<sup>e</sup>	526.40	526.40	941.70	941.70
1984	<sup>e</sup>	<sup>e</sup>	559.40	559.40	967.00	967.00
1985	<sup>e</sup>	<sup>e</sup>	591.30	591.30	988.00	988.00
1986	<sup>e</sup>	<sup>e</sup>	630.50	630.50	1,021.70	1,021.70
1987	<sup>e</sup>	<sup>e</sup>	662.10	662.10	1,059.20	1,059.20
1988	<sup>e</sup>	<sup>e</sup>	686.70	686.70	1,054.40	1,054.40
1989	<sup>e</sup>	<sup>e</sup>	734.00	734.00	1,083.60	1,083.60
1990	<sup>e</sup>	<sup>e</sup>	774.60	774.60	1,092.40	1,092.40
1991	<sup>e</sup>	<sup>e</sup>	810.00	810.00	1,083.80	1,083.80
1992	<sup>e</sup>	<sup>e</sup>	854.10	854.10	1,102.30	1,102.30
1993	<sup>e</sup>	<sup>e</sup>	893.60	893.60	1,119.80	1,119.80
1994	<sup>e</sup>	<sup>e</sup>	948.00	948.00	1,157.80	1,157.80
1995	<sup>e</sup>	<sup>e</sup>	965.90	965.90	1,147.70	1,147.70
1996	<sup>e</sup>	<sup>e</sup>	999.90	999.90	1,158.00	1,158.00
1997	<sup>e</sup>	<sup>e</sup>	1,049.10	1,049.10	1,180.90	1,180.90
1998	<sup>e</sup>	<sup>e</sup>	1,109.60	1,109.60	1,223.40	1,223.40
1999	<sup>e</sup>	<sup>e</sup>	1,183.60	1,183.60	<sup>f</sup> 1,288.10	<sup>f</sup> 1,288.10
2000	<sup>e</sup>	<sup>e</sup>	1,241.70	1,241.70	1,318.50	1,318.50
2001	<sup>e</sup>	<sup>e</sup>	1,307.30	1,307.30	1,341.20	1,341.20
2002	<sup>e</sup>	<sup>e</sup>	1,375.30	1,375.30	...	...

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 to 65 and 2 months, the reduction increased to 20.008333 percent (see Table 2.A20). In 2001 the full retirement age increased to 65 and 4 months for a maximum reduction of 21.666667 percent. In 2002 the full retirement age increased to 65 and 6 months for a maximum reduction of 22.5 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 1978 PIA table.

e. Minimum PIA eliminated by 1981 legislation 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 Dec. 29, 1981).

f. 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 P.L. 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.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; regulations issued under the Act; and precedential case decisions (rulings).

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Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

NOTES: Benefit first available at age 62 to female workers effective November 1956 and to male workers effective August 1961.

... = not applicable.

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## 2.A OASDI: Benefit Types and Levels

**Table 2.A28—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 65, 1940–2002 (in dollars)**

Year of attainment of age 65 <sup>a</sup>	Minimum benefit		Maximum benefit			
	Payable at time of retirement	Payable effective December 2001 <sup>b</sup>	Payable at time of retirement		Payable effective December 2001 <sup>b</sup>	
			Men	Women	Men	Women
1940	10.00	326.20	41.20	41.20	632.50	632.50
1941	10.00	326.20	41.60	41.60	632.50	632.50
1942	10.00	326.20	42.00	42.00	640.00	640.00
1943	10.00	326.20	42.40	42.40	640.00	640.00
1944	10.00	326.20	42.80	42.80	640.00	646.90
1945	10.00	326.20	43.20	43.20	646.90	646.90
1946	10.00	326.20	43.60	43.60	654.70	654.70
1947	10.00	326.20	44.00	44.00	660.80	660.80
1948	10.00	326.20	44.40	44.40	660.80	660.80
1949	10.00	326.20	44.80	44.80	667.50	667.50
1950	10.00	326.20	45.20	45.20	675.80	675.80
1951	20.00	326.20	68.50	68.50	675.80	675.80
1952	20.00	326.20	68.50	68.50	675.80	675.80
1953	25.00	326.20	85.00	85.00	746.60	746.60
1954	25.00	326.20	85.00	85.00	746.60	746.60
1955	30.00	326.20	98.50	98.50	746.60	746.60
1956	30.00	326.20	103.50	103.50	788.80	788.80
1957	30.00	326.20	108.50	108.50	824.40	824.40
1958	30.00	326.20	108.50	108.50	824.40	824.40
1959	33.00	326.20	116.00	116.00	824.40	824.40
1960	33.00	326.20	119.00	119.00	845.10	845.10
1961	33.00	326.20	120.00	120.00	851.80	851.80
1962	40.00	326.20	121.00	123.00	859.60	874.20
1963	40.00	326.20	122.00	125.00	866.40	887.30
1964	40.00	326.20	123.00	127.00	874.20	902.10
1965	44.00	326.20	131.70	135.90	874.20	902.10
1966	44.00	326.20	132.70	135.90	880.60	902.10
1967	44.00	326.20	135.90	140.00	902.10	928.80
1968	<sup>c</sup> 55.00	326.20	<sup>c</sup> 156.00	<sup>c</sup> 161.60	915.70	948.70
1969	55.00	326.20	160.50	167.30	942.60	982.10
1970	64.00	326.20	189.80	196.40	968.90	1,003.40
1971	70.40	326.20	213.10	220.40	988.70	1,021.80
1972	70.40	326.20	216.10	224.70	1,003.40	1,042.60
1973	84.50	326.20	266.10	276.40	1,028.90	1,068.90
1974	84.50	326.20	274.60	284.90	1,061.30	1,101.60
1975	93.80	326.20	316.30	333.70	1,101.60	1,162.20
1976	101.40	326.20	364.00	378.80	1,173.00	1,220.90
1977	107.90	326.20	412.70	422.40	1,250.30	1,279.30
1978	114.30	326.20	459.80	459.80	1,315.30	1,315.30
1979	121.80	326.20	503.40	503.40	1,351.90	1,351.90
1980	133.90	326.20	572.00	572.00	1,397.80	1,397.80
1981	153.10	326.20	677.00	677.00	1,447.40	1,447.40
1982	<sup>d</sup> 170.30	326.20	<sup>d</sup> 679.30	<sup>d</sup> 679.30	1,305.40	1,305.40
1983	<sup>d</sup> 166.40	296.80	709.50	709.50	1,269.90	1,269.90
1984	<sup>d</sup> 150.50	258.90	703.60	703.60	1,216.50	1,216.50
1985	e	e	717.20	717.20	1,198.50	1,198.50
1986	e	e	760.10	760.10	1,231.90	1,231.90
1987	e	e	789.20	789.20	1,262.90	1,262.90
1988	e	e	838.60	838.60	1,287.90	1,287.90
1989	e	e	899.60	899.60	1,328.30	1,328.30

See footnotes at end of table.

**Table 2.A28—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 65, 1940–2002 (in dollars)—Continued**

Year of attainment of age 65 <sup>a</sup>	Minimum benefit		Maximum benefit			
	Payable at time of retirement	Payable effective December 2001 <sup>b</sup>	Payable at time of retirement		Payable effective December 2001 <sup>b</sup>	
			Men	Women	Men	Women
1990.....	e	e	975.00	975.00	1,375.30	1,375.30
1991.....	e	e	1,022.90	1,022.90	1,369.00	1,369.00
1992.....	e	e	1,088.70	1,088.70	1,405.20	1,405.20
1993.....	e	e	1,128.80	1,128.80	1,414.50	1,414.50
1994.....	e	e	1,147.50	1,147.50	1,401.50	1,401.50
1995.....	e	e	1,199.10	1,199.10	1,424.70	1,424.70
1996.....	e	e	1,248.90	1,248.90	1,446.40	1,446.40
1997.....	e	e	1,326.60	1,326.60	1,493.30	1,493.30
1998.....	e	e	1,342.80	1,342.80	1,480.40	1,480.40
1999.....	e	e	1,373.10	1,373.10	<sup>f</sup> 1,494.40	<sup>f</sup> 1,494.40
2000.....	e	e	<sup>f</sup> 1,435.30	<sup>f</sup> 1,435.30	<sup>f</sup> 1,524.10	<sup>f</sup> 1,524.10
2001.....	e	e	<sup>f</sup> 1,538.20	<sup>f</sup> 1,538.20	<sup>f</sup> 1,578.10	1,578.10
2002.....	e	e	<sup>f</sup> 1,660.50	<sup>f</sup> 1,660.50	...	...

- a. Assumes the worker began to work at age 22, retired at the beginning of the year, had no earnings after retirement, and had no prior period of disability.
- b. Final benefit amount payable after Supplementary Medical Insurance (SMI) premium or any other deduction is rounded to next lower \$1.
- c. Effective for February 1968.
- d. Derived from transitional guarantee computation based on 1978 PIA table.
- e. Minimum PIA eliminated by 1981 legislation 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 Dec 29, 1981.)
- f. 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 P.L. 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.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

NOTE: ... = not applicable.

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

Table 2.A29—Earnings (retirement) test

Year enacted	Beneficiaries exempt	Earnings subject to test	Amount permitted without reduction in benefits (exempt amount)		Reduction in monthly benefit <sup>a</sup>	Effective year
			Annual earnings (dollars)	Monthly wages <sup>b</sup> (dollars)		
<b>For all beneficiaries</b>						
1935	...	Covered	...	...	Full monthly benefit	...
1939	...	...	...	14.99	...	1940
1950	Aged 75 or older	...	<sup>c</sup> 600	50.00	...	1951
1952	...	...	<sup>c</sup> 900	75.00	...	1953
1954	Aged 72 or older	All <sup>d</sup>	1,200	80.00	One month's full benefit for each \$80.00 or fraction thereof	1955
1956	Disabled	...	...	...	...	1958
1958	...	...	...	100.00	...	1959
1960	...	...	...	...	\$1 for each \$2 of earnings from \$1,201–\$1,500 \$1 for each \$1 of earnings above \$1,500	1961
1961	...	...	...	...	\$1 for each \$2 of earnings from \$1,201–\$1,700 \$1 for each \$1 of earnings above \$1,700	1962
1965	...	...	1,500	125.00	\$1 for each \$2 of earnings from \$1,501–\$2,700 \$1 for each \$1 of earnings above \$2,700	1966
1967	...	...	1,680	140.00	\$1 for each \$2 of earnings from \$1,681–\$2,880 \$1 for each \$1 of earnings above \$2,880	1968
1972	...	Up to age 72	2,100	175.00	\$1 for each \$2 of earnings above \$2,100	1973
1973	...	...	2,400	200.00	\$1 for each \$2 of earnings above \$2,400	1974
			<sup>e</sup> 2,520	<sup>e</sup> 210.00	\$1 for each \$2 of earnings above \$2,520	1975
			<sup>e</sup> 2,760	<sup>e</sup> 230.00	\$1 for each \$2 of earnings above \$2,760	1976
			<sup>e</sup> 3,000	<sup>e</sup> 250.00	\$1 for each \$2 of earnings above \$3,000	1977
<b>For beneficiaries who have not reached full retirement age <sup>f</sup></b>						
1977	...	...	<sup>e</sup> 3,240	<sup>e</sup> 270.00	\$1 for each \$2 of earnings above \$3,240	1978
			<sup>e</sup> 3,480	<sup>e</sup> 290.00	\$1 for each \$2 of earnings above \$3,480	1979
			<sup>e</sup> 3,720	<sup>e</sup> 310.00	\$1 for each \$2 of earnings above \$3,720	1980
			<sup>e</sup> 4,080	<sup>e</sup> 340.00	\$1 for each \$2 of earnings above \$4,080	1981
			<sup>e</sup> 4,440	<sup>e</sup> 370.00	\$1 for each \$2 of earnings above \$4,440	1982
			<sup>e</sup> 4,920	<sup>e</sup> 410.00	\$1 for each \$2 of earnings above \$4,920	1983
			<sup>e</sup> 5,160	<sup>e</sup> 430.00	\$1 for each \$2 of earnings above \$5,160	1984
			<sup>e</sup> 5,400	<sup>e</sup> 450.00	\$1 for each \$2 of earnings above \$5,400	1985
			<sup>e</sup> 5,760	<sup>e</sup> 480.00	\$1 for each \$2 of earnings above \$5,760	1986
			<sup>e</sup> 6,000	<sup>e</sup> 500.00	\$1 for each \$2 of earnings above \$6,000	1987
			<sup>e</sup> 6,120	<sup>e</sup> 510.00	\$1 for each \$2 of earnings above \$6,120	1988
			<sup>e</sup> 6,480	<sup>e</sup> 540.00	\$1 for each \$2 of earnings above \$6,480	1989
			<sup>e</sup> 6,840	<sup>e</sup> 570.00	\$1 for each \$2 of earnings above \$6,840	1990
			<sup>e</sup> 7,080	<sup>e</sup> 590.00	\$1 for each \$2 of earnings above \$7,080	1991
			<sup>e</sup> 7,440	<sup>e</sup> 620.00	\$1 for each \$2 of earnings above \$7,440	1992
			<sup>e</sup> 7,680	<sup>e</sup> 640.00	\$1 for each \$2 of earnings above \$7,680	1993
			<sup>e</sup> 8,040	<sup>e</sup> 670.00	\$1 for each \$2 of earnings above \$8,040	1994
			<sup>e</sup> 8,160	<sup>e</sup> 680.00	\$1 for each \$2 of earnings above \$8,160	1995
			<sup>e</sup> 8,280	<sup>e</sup> 690.00	\$1 for each \$2 of earnings above \$8,280	1996
			<sup>e</sup> 8,640	<sup>e</sup> 720.00	\$1 for each \$2 of earnings above \$8,640	1997
			<sup>e</sup> 9,120	<sup>e</sup> 760.00	\$1 for each \$2 of earnings above \$9,120	1998
			<sup>e</sup> 9,600	<sup>e</sup> 800.00	\$1 for each \$2 of earnings above \$9,600	1999

See footnotes at end of table.



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

**Table 2.A29—Earnings (retirement) test—Continued**

Year enacted	Beneficiaries exempt	Earnings subject to test	Amount permitted without reduction in benefits (exempt amount)		Reduction in monthly benefit <sup>a</sup>	Effective year
			Annual earnings (dollars)	Monthly wages <sup>b</sup> (dollars)		
<b>For beneficiaries who have reached full retirement age <sup>f</sup></b>						
1977	...	...	g 4,000	g 333.33	\$1 for each \$2 of earnings above \$4,000	1978
			g 4,500	g 375.00	\$1 for each \$2 of earnings above \$4,500	1979
			g 5,000	g 416.66	\$1 for each \$2 of earnings above \$5,000	1980
			g 5,500	g 458.33	\$1 for each \$2 of earnings above \$5,500	1981
			g 6,000	g 500.00	\$1 for each \$2 of earnings above \$6,000	1982
1981	Aged 70 or older	Up to age 70	...	...	...	1983
			e 6,600	e 550.00	\$1 for each \$2 of earnings above \$6,600	1983
			e 6,960	e 580.00	\$1 for each \$2 of earnings above \$6,960	1984
			e 7,320	e 610.00	\$1 for each \$2 of earnings above \$7,320	1985
			e 7,800	e 650.00	\$1 for each \$2 of earnings above \$7,800	1986
			e 8,160	e 680.00	\$1 for each \$2 of earnings above \$8,160	1987
			e 8,400	e 700.00	\$1 for each \$2 of earnings above \$8,400	1988
			e 8,880	e 740.00	\$1 for each \$2 of earnings above \$8,880	1989
1983	...	...	...	...	\$1 for each \$3 of earnings above exempt amount	1990
			e 9,360	e 780.00	\$1 for each \$3 of earnings above \$9,360	1990
			e 9,720	e 810.00	\$1 for each \$3 of earnings above \$9,720	1991
			e 10,200	e 850.00	\$1 for each \$3 of earnings above \$10,200	1992
			e 10,560	e 880.00	\$1 for each \$3 of earnings above \$10,560	1993
			e 11,160	e 930.00	\$1 for each \$3 of earnings above \$11,160	1994
			e 11,280	e 940.00	\$1 for each \$3 of earnings above \$11,280	1995
1996	...	...	12,500	h 1,041.67	\$1 for each \$3 of earnings above \$12,500	1996
			13,500	1,125.00	\$1 for each \$3 of earnings above \$13,500	1997
			14,500	i 1,208.33	\$1 for each \$3 of earnings above \$14,500	1998
			15,500	j 1,291.67	\$1 for each \$3 of earnings above \$15,500	1999
2000	...	...	EARNINGS TEST ELIMINATED <sup>k</sup>			2000
<b>For beneficiaries who will not reach full retirement age during year <sup>f</sup></b>						
2000	...	...	e 10,080	e 840	\$1 for each \$2 of earnings above \$10,080	2000
	...	...	e 10,680	e 890	\$1 for each \$2 of earnings above \$10,680	2001
	...	...	e 11,280	e 940	\$1 for each \$2 of earnings above \$11,280	2002
<b>For beneficiaries who will reach full retirement age during year <sup>f</sup></b>						
2000	...	...	17,000	l 1,416.67	\$1 for each \$3 of earnings above \$17,000	2000
			25,000	m 2,083.33	\$1 for each \$3 of earnings above \$25,000	2001
			30,000	2,500.00	\$1 for each \$3 of earnings above \$30,000	2002

- a. Earnings of retired-worker beneficiary affect total monthly family benefit. Earnings of dependent or survivor beneficiary affect only his or her benefit. However, effective January 1985, earnings of retired-worker beneficiary do not affect benefit to divorced spouse who has been divorced at least 2 years. Effective for benefits after December 1990, the 2-year requirement is waived, if the worker was entitled to benefits before the divorce.
- b. Monthly test for self-employment income is defined in terms of substantial services. For taxable years beginning after Dec. 31, 1977, monthly test eliminated for both wage and self-employment income except that each individual may use monthly test for 1 grace year, usually the year of retirement.
- c. Applied to self-employment income only.
- d. Special provisions for earnings in noncovered employment outside the United States.
- e. Became effective due to automatic adjustment provisions mandated by 1972 and 1973 legislation.
- f. Age 65 for beneficiaries who attain age 62 (age 60 for widows and widowers) before 2000, gradually increasing to age 67 for beneficiaries who attain age 62 in 2022 or later.
- g. Discretionary increase included in 1977 legislation.
- h. Actual amount is \$1,041.66 2/3.
- i. Actual amount is \$1,208.33 1/3.
- j. Actual amount is \$1,291.66 2/3.
- k. Public Law 106-182, enacted Apr. 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.
- l. Actual amount is \$1,416.66 2/3.
- m. Actual amount is \$2,083.33 1/3.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

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

**Table 2.A30—Earnings guidelines regarding substantial gainful activity (SGA), 1961–2002**

Year	Average monthly amounts of earnings (dollars) for —		
	Nonblind beneficiaries <sup>a</sup>		Blind beneficiaries (dollars) <sup>b</sup>
	Maximum (dollars)	Minimum (dollars)	
1961–1965 .....	100	50	c
1966–June 1968 .....	125	75	c
July 1968–1973 .....	140	90	c
1974–1975 .....	200	130	c
1976 .....	230	150	c
1977 .....	240	160	c
1978 .....	260	170	334
1979 .....	280	180	375
1980 .....	300	190	417
1981 .....	300	190	459
1982 .....	300	190	500
1983–1989 .....	300	190	d
1990 .....	500	300	780
1991 .....	500	300	810
1992 .....	500	300	850
1993 .....	500	300	880
1994 .....	500	300	930
1995 .....	500	300	940
1996 .....	500	300	960
1997 .....	500	300	1,000
1998 .....	500	300	1,050
January–June 1999 .....	500	300	1,110
July 1999 .....	700	300	1,110
January 2000 .....	700	300	1,170
January 2001 .....	740	300	1,240
January 2002 .....	<sup>e</sup> 780	300	<sup>f</sup> 1,300

- a. Earnings above the maximum amount ordinarily demonstrate SGA; earnings below the minimum amount show that SGA has not occurred. When earnings are between the minimum and maximum, other factors are considered.
- b. The 1977 amendments provided that, effective 1978, earnings of blind beneficiaries would be evaluated under different SGA guidelines than nonblind beneficiaries.
- c. Pre-1978 guidelines are the same as those applicable to nonblind beneficiaries.
- d. Annual amounts were determined by automatic adjustments linked to increases in average wage level. The amounts equal the monthly exempt amounts under the earnings test applicable to beneficiaries who have reached full retirement age (see Table 2.A29—fourth column, third bank—for the 1983–1995 amounts).
- e. Computed as follows: Nonblind SGA amount for 2001, multiplied by the ratio of the 2001 national average wage index to the 1998 index. Rounding is to the nearest multiple of \$10. (Had this computation produced a lower SGA level than the 2001 level, the 2001 level would have been used.)
- f. Computed as follows: Blind SGA amount for 1994, multiplied by the ratio of the 2001 national average wage index to the 1992 index. Rounding is to the nearest multiple of \$10. (Had this computation produced a lower SGA level than the 2001 level, the 2001 level would have been used.)

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.gov/regulations/index.htm). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2002," *Federal Register*, vol. 66, no. 207 (October 25, 2001).

NOTES: Earnings are net of any wage subsidies and impairment-related expenses. SGA guidelines 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 to that of nondisabled self-employed individuals.

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

Table 2.A31—Taxation of Social Security benefits

Year enacted	Definition of income	Individuals or couples with income exceeding (dollars)—	Benefits included in gross income	Effective for taxable years—
<b>Married filing jointly</b>				
1983 .....	Modified adjusted gross income, <sup>a</sup> plus 50 percent of Social Security and Tier 1 Railroad Retirement benefits <sup>b</sup>	32,000	Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits <sup>b</sup> or one-half of income over 32,000	Ending after Dec. 31, 1983
1993 .....	Same as above	32,000 but not 44,000	Same as above	Beginning after Dec. 31, 1993
		44,000	Lesser of 85 percent of Social Security and Tier 1 Railroad Retirement benefits <sup>b</sup> or the sum of 6,000 plus 85 percent of income over 44,000	
<b>Married filing separate returns <sup>c</sup></b>				
1983 .....	Same as above	0	Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits <sup>b</sup> or one-half of income	Ending after Dec. 31, 1983
1993 .....	Same as above	0	Lesser of 85 percent of Social Security and Tier 1 Railroad Retirement benefits <sup>b</sup> or 85 percent of income	Beginning after Dec. 31, 1993
<b>Individuals in all other filing categories</b>				
1983 .....	Same as above	25,000	Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits <sup>b</sup> or one-half of income over 25,000	Ending after Dec. 31, 1983
1993 .....	Same as above	25,000 but not 34,000	Same as above	Beginning after Dec. 31, 1993
		34,000	Lesser of 85 percent of Social Security and Tier 1 Railroad Retirement benefits <sup>b</sup> or 85 percent of income over 34,000	

- a. Adjusted gross income (before Social Security or Railroad Retirement benefits are considered), plus tax-exempt interest income, with further modification of adjusted gross income in some cases involving certain tax provisions of limited applicability among the beneficiary population.
- b. Includes workers' compensation benefits to the extent they cause a reduction in Social Security or Tier 1 Railroad Retirement disability benefits.
- c. 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.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.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>.

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**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—lesser of one-half of benefits or one-half of income over base amount	If income exceeds upper base amount—lesser of 85 percent of benefits or one-half of income between 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

- a. Adjusted gross income (before Social Security or Railroad Retirement benefits are considered), plus tax-exempt interest income, with further modification of adjusted gross income in some cases involving certain tax provisions of limited applicability among the beneficiary population.
- b. Social Security and Tier 1 Railroad Retirement benefits, including workers' compensation benefits to the extent they cause a reduction in either of these two types of benefits.
- c. For married couples filing joint returns, up to 50 percent of benefits are subject to income tax if gross income is 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).
- d. Includes only married taxpayers filing separately who lived with their spouse at any time during the tax year; married individuals filing separately who did not live with their spouse are treated the same as unmarried individuals.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2001; 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 [www.ssa.gov/regulations/index.htm](http://www.ssa.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.

CONTACT: Curt Pauzenga (410) 965-7210 or Joseph Bondar (410) 965-0162.

Table 2.B1—Federal benefit rates, 1974–2002

Act	Living arrangement <sup>a</sup>	Amount <sup>b</sup> (dollar)		Condition
		Individual	Couple	
1972.....	Own household <sup>c</sup>	130.00	195.00	Was to be effective Jan. 1, 1974; superseded by 1973b provision.
1973b.....	...	140.00	210.00	<i>Effective Jan. 1, 1974.</i>
1973b.....	...	146.00	219.00	<i>Effective July 1, 1974.</i>
1974.....	...	...	...	Mechanism established for providing cost-of-living adjustments.
	...	157.70	236.60	<i>Effective July 1, 1975.</i>
	...	167.80	251.80	<i>Effective July 1, 1976.</i>
	...	177.70	266.70	<i>Effective July 1, 1977.</i>
	...	189.40	284.10	<i>Effective July 1, 1978.</i>
	...	208.20	312.30	<i>Effective July 1, 1979.</i>
	...	238.00	357.00	<i>Effective July 1, 1980.</i>
	...	264.70	397.00	<i>Effective July 1, 1981.</i>
	...	284.30	426.40	<i>Effective July 1, 1982.</i>
1983.....	...	304.30	456.40	<i>Effective July 1, 1983 (general benefit increase).</i>
	...	314.00	472.00	<i>Effective Jan. 1, 1984.</i>
	...	325.00	488.00	<i>Effective Jan. 1, 1985.</i>
	...	336.00	504.00	<i>Effective Jan. 1, 1986.</i>
	...	340.00	510.00	<i>Effective Jan. 1, 1987.</i>
	...	354.00	532.00	<i>Effective Jan. 1, 1988.</i>
	...	368.00	553.00	<i>Effective Jan. 1, 1989.</i>
	...	386.00	579.00	<i>Effective Jan. 1, 1990.</i>
	...	407.00	610.00	<i>Effective Jan. 1, 1991.</i>
	...	422.00	633.00	<i>Effective Jan. 1, 1992.</i>
	...	434.00	652.00	<i>Effective Jan. 1, 1993.</i>
	...	446.00	669.00	<i>Effective Jan. 1, 1994.</i>
	...	458.00	687.00	<i>Effective Jan. 1, 1995.</i>
	...	470.00	705.00	<i>Effective Jan. 1, 1996.</i>
	...	484.00	726.00	<i>Effective Jan. 1, 1997.</i>
	...	494.00	741.00	<i>Effective Jan. 1, 1998.</i>
	...	500.00	751.00	<i>Effective Jan. 1, 1999.</i>
	...	<sup>d</sup> 513.00	769.00	<i>Effective Jan. 1, 2000.</i>
	...	<sup>d</sup> 531.00	796.00	<i>Effective Jan. 1, 2001.</i>
	...	545.00	817.00	<i>Effective Jan. 1, 2002.</i>
1972.....	Receiving institutional care covered by Medicaid	25.00	50.00	<i>Effective Jan. 1, 1974. Must be receiving more than 50 percent of the cost of the care from Medicaid (Title XIX of the Social Security Act).</i>
1987.....	...	30.00	60.00	<i>Effective July 1, 1988. Must be receiving more than 50 percent of the cost of the care from Medicaid (Title XIX of the Social Security Act).</i>

a. For those in another person's household receiving support and maintenance there, the federal benefit rate is reduced by one-third.

b. For those without countable income. These payments are reduced by the amount of countable income of the individual or couple.

c. Includes persons in private institutions whose care is not provided by Medicaid.

d. Benefits originally paid in 2000 and through July 2001 were based on federal benefit rates of \$512.00 and \$530.00, 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 based on an adjusted benefit rate for months prior to August 2001.

NOTE: ... = not applicable.

CONTACT: Lenna D. Kennedy (410) 965-9846.

## 2.C Medicare: History of Provisions

**Table 2.C1—Medicare cost sharing and premium amounts, 1966–2003**

Effective date <sup>a</sup>	Hospital Insurance					Supplementary Medical Insurance					
	All expenses in "benefit period" covered except—					Monthly premium <sup>b</sup> (dollars)	Annual deductible (dollars)	Coinsurance (percents)	Monthly premium (dollars)		
	Inpatient hospital deductible (IHD) covers first 60 days (dollars)	Inpatient hospital daily coinsurance		Skilled nursing facility daily coinsurance after 20 days (1/8 X IHD) (dollars)	For enrollee <sup>c</sup> (aged and disabled)				Government amounts for—		
		Days 61 through 90 (1/4 X IHD) (dollars)	Lifetime reserve days after 90 days (1/2 X IHD)						Aged	Disabled <sup>c</sup>	
July											
1966.....	40	10	d	d	...	50	20	3.00	3.00	...	
1967.....	40	10	d	5.00	...	50	20	3.00	3.00	...	
1968.....	40	10	20	5.00	...	e50	e20	f 4.00	f 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	g20	5.80	5.80	...	
1973.....	72	18	36	9.00	33	60	20	h 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	i,j 60	j 20	11.00	34.20	62.20	
1982.....	260	65	130	32.50	113	k 75	k 20	12.20	37.00	72.00	
1983.....	304	76	152	38.00	113	75	20	12.20	41.80	80.00	
January											
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.....	l 560	l	l	m 25.50	156	75	20	n 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	o 245	100	20	41.10	82.50	111.10	
1995.....	716	179	358	89.50	o 261	100	20	46.10	100.10	165.50	
1996.....	736	184	368	92.00	o 289	100	20	42.50	127.30	167.70	
1997.....	760	190	380	95.00	o 311	100	20	43.80	131.40	177.00	
1998.....	764	191	382	95.50	o 309	100	20	43.80	132.00	150.40	
1999.....	768	192	384	96.00	o 309	100	20	45.50	139.10	160.50	
2000.....	776	194	388	97.00	o 301	100	20	45.50	138.30	196.70	
2001.....	792	198	396	99.00	o 300	100	20	50.00	152.00	214.40	
2002.....	812	203	406	101.50	o 319	100	20	54.00	109.30	123.10	
2003.....	840	210	420	105.00	o 316	100	20	58.70	118.70	141.00	

- a. The HI and SMI deductible and coinsurance amounts begin in January unless otherwise noted. The HI and SMI monthly premium amounts were effective in July through 1983 and in January for 1984 and succeeding years.
- b. Premium paid for voluntary participation of individuals aged 65 or older not otherwise entitled to Hospital Insurance and of certain disabled individuals who have exhausted other entitlement.
- c. Beginning in July 1973 for the disabled.
- d. Benefit not provided.
- e. Professional inpatient services of pathologists and radiologists not subject to deductible or coinsurance, beginning in April 1968.
- f. Beginning in April 1968.
- g. Home health services not subject to coinsurance, beginning in January 1973.
- h. Monthly premium for July and August 1973 was reduced to \$5.80 and \$6.10, respectively, by the Cost of Living Council.
- i. Home health services not subject to deductible.
- j. Same as footnote e, but only when physician accepts assignment.
- k. Effective October 1, 1982, professional inpatient services of pathologists and radiologists are subject to deductible and coinsurance.
- l. 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).
- m. 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.
- n. Includes the standard monthly SMI 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.
- o. A reduced premium is available to individuals aged 65 or 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 Social Security coverage. The reduced premium is \$184, \$183, \$188, \$187, \$170, \$170, \$166, \$165, \$175, and \$174, for 1994 to 2003, respectively.

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: ... = not applicable.

CONTACT: Clare McFarland (410) 786-6390 or Rita DiSimone (202) 358-6221.

**Table 2.C2—Federal medical assistance percentage and enhanced federal medical assistance percentage, by state or other area, 2001 and 2002**

State or area	Federal medical assistance percentage <sup>a</sup>			Enhanced federal medical assistance percentage <sup>b</sup>	
	2001 <sup>c</sup>	2002 <sup>d</sup>	2003 <sup>e</sup>	2002	2003
Alabama .....	69.99	70.45	70.60	79.32	79.42
Alaska.....	<sup>f</sup> 56.04	<sup>f</sup> 53.01	<sup>f</sup> 58.27	<sup>f</sup> 67.11	<sup>f</sup> 70.79
Arizona .....	65.77	64.98	67.25	75.49	77.08
Arkansas.....	73.02	72.64	74.28	80.85	82.00
California .....	51.25	51.40	50.00	65.98	65.00
Colorado.....	50.00	50.00	50.00	65.00	65.00
Connecticut.....	50.00	50.00	50.00	65.00	65.00
Delaware .....	50.00	50.00	50.00	65.00	65.00
District of Columbia .....	<sup>f</sup> 70.00	<sup>f</sup> 70.00	<sup>f</sup> 70.00	<sup>f</sup> 79.00	<sup>f</sup> 79.00
Florida.....	56.52	56.43	58.83	69.50	71.18
Georgia .....	59.67	59.00	59.60	71.30	71.72
Hawaii.....	53.85	56.34	58.77	69.44	71.14
Idaho.....	70.76	71.02	70.96	79.71	79.67
Illinois.....	50.00	50.00	50.00	65.00	65.00
Indiana.....	62.04	62.04	61.97	73.43	73.38
Iowa.....	62.67	62.86	63.50	74.00	74.45
Kansas.....	59.85	60.20	60.15	72.14	72.11
Kentucky.....	70.39	69.94	69.89	78.96	78.92
Louisiana .....	70.53	70.30	71.28	79.21	79.90
Maine.....	66.12	66.58	66.22	76.61	76.35
Maryland.....	50.00	50.00	50.00	65.00	65.00
Massachusetts.....	50.00	50.00	50.00	65.00	65.00
Michigan.....	56.18	56.36	55.42	69.45	68.79
Minnesota.....	51.11	50.00	50.00	65.00	65.00
Mississippi.....	76.82	76.09	76.62	83.26	83.63
Missouri.....	61.03	61.06	61.23	72.74	72.86
Montana.....	73.04	72.83	72.96	80.98	81.07
Nebraska.....	60.38	59.55	59.52	71.69	71.66
Nevada.....	50.36	50.00	52.39	65.00	66.67
New Hampshire.....	50.00	50.00	50.00	65.00	65.00
New Jersey.....	50.00	50.00	50.00	65.00	65.00
New Mexico.....	73.80	73.04	74.56	81.13	82.19
New York.....	50.00	50.00	50.00	65.00	65.00
North Carolina.....	62.47	61.46	62.56	73.02	73.79
North Dakota.....	69.99	69.87	68.36	78.91	77.85
Ohio.....	59.03	58.78	58.83	71.15	71.18
Oklahoma.....	71.24	70.43	70.56	79.30	79.39
Oregon.....	60.00	59.20	60.16	71.44	72.11
Pennsylvania.....	53.62	54.65	54.69	68.26	68.28
Rhode Island.....	53.79	52.45	55.40	66.72	68.78
South Carolina.....	70.44	69.34	69.81	78.54	78.87
South Dakota.....	68.31	65.93	65.29	76.15	75.70
Tennessee.....	63.79	63.64	64.59	74.55	75.21
Texas.....	60.57	60.17	59.99	72.12	71.99
Utah.....	71.44	70.00	71.24	79.00	79.87
Vermont.....	62.40	63.06	62.41	74.14	73.69
Virginia.....	51.85	51.45	50.53	66.02	65.37
Washington.....	50.70	50.37	50.00	65.26	65.00
West Virginia.....	75.34	75.27	75.04	82.69	82.53
Wisconsin.....	59.29	58.57	58.43	71.00	70.90
Wyoming.....	64.60	61.97	61.32	73.38	72.92
Outlying areas					
American Samoa.....	<sup>g</sup> 50.00	<sup>g</sup> 50.00	<sup>g</sup> 50.00	<sup>g</sup> 65.00	<sup>g</sup> 65.00
Guam.....	<sup>g</sup> 50.00	<sup>g</sup> 50.00	<sup>g</sup> 50.00	<sup>g</sup> 65.00	<sup>g</sup> 65.00
Northern Mariana Islands.....	<sup>g</sup> 50.00	<sup>g</sup> 50.00	<sup>g</sup> 50.00	<sup>g</sup> 65.00	<sup>g</sup> 65.00
Puerto Rico.....	<sup>g</sup> 50.00	<sup>g</sup> 50.00	<sup>g</sup> 50.00	<sup>g</sup> 65.00	<sup>g</sup> 65.00
Virgin Islands.....	<sup>g</sup> 50.00	<sup>g</sup> 50.00	<sup>g</sup> 50.00	<sup>g</sup> 65.00	<sup>g</sup> 65.00

a. Section 1905 (b) of the Social Security Act specifies the method to be used to compute the federal medical assistance percentage. From this section the following formula is derived:

N = 3-year average national per capita personal income

S = 3-year average state per capita personal income

Federal medical assistance percentage:

State share =  $(S^2/N^2) \times 45$  or  $(45/N^2) \times S^2$

Federal share = 100 - 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%.

c. Effective October 1, 1998, through September 30, 1999.

d. Effective October 1, 2000, through September 30, 2001.

e. Effective October September 1, 2002, through September 30, 2003.

f. For 1998, 1999, and 2000, the values in the table were set for state plans under Titles XIX and XXI and for capitation payments and disproportionate share hospital allotments under those titles. For other purposes, the percentage for Alaska is 52.26 and for the District of Columbia 50 percent.

g. For purposes of section 1118 of the Social Security Act, the federal medical assistance percentage used under Title I, X, XIV, and XVI, and part A of Title IV will be 75 percent.

SOURCE: Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation.

CONTACT: Gene Moyer (202) 690-7861.

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

**Table 2.F1—Number of SSA offices, 2001**

Organization	Number
Headquarters (Baltimore, Maryland).....	1
Regional offices <sup>a</sup> .....	10
Field offices <sup>b</sup> .....	1,337
Level 1.....	612
Level 2.....	675
Resident stations.....	50
Teleservice centers.....	36
Program service centers <sup>c</sup> .....	6
Data operations center <sup>d</sup> .....	1
Office of Hearings and Appeals	
Headquarters (Falls Church, Virginia).....	1
Regional offices.....	10
Hearing offices.....	138
Satellite offices.....	4

- a. Regional offices are located in Boston, MA; New York, NY; Philadelphia, PA; Atlanta, GA; Chicago, IL; Dallas, TX; Kansas City, MO; Denver, CO; San Francisco, CA; and Seattle, WA.
- 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. Program service centers are located in Jamaica, NY; Philadelphia, PA; Birmingham, AL; Chicago, IL; Kansas City, MO; and Richmond, CA.
- d. The data operations center is located in Wilkes-Barre, PA.

SOURCES: Social Security Administration, Office of Public Service and Operations Support's database and Office of Hearings and Appeals Case Control System.

CONTACT: Harold Atkins for SSA data (410) 965-2367 and Leola Britford for Office of Hearings and Appeals data (703) 605-8219.

**Table 2.F2—Number of SSA employees and percentage distribution who are women, minorities, and disabled, by grade, September 30, 2001**

Employees	Total	GS 1–4	GS 5–8	GS 9–12	GS 13–15	SES
Total number <sup>a</sup> .....	63,360	1,191	20,601	32,544	7,517	115
Percentage of—						
Women.....	70.7	76.5	81.6	71.7	47.4	35.7
Minorities.....	41.7	44.8	55.9	37.5	24.2	32.2
Black.....	26.8	31.4	35.0	24.4	16.4	20.9
Hispanic.....	10.9	9.9	15.7	9.6	4.8	9.6
Asian or Pacific Islander.....	2.8	2.9	3.8	2.5	1.9	1.7
American Indian or Alaska Native.....	1.1	0.6	1.4	1.0	1.0	0
Employees with severe disabilities.....	2.3	12.3	3.9	1.3	0.9	0

- a. Includes all full-time and part-time permanent employees.

SOURCE: Social Security Administration's Affirmative Employment Plan.

CONTACT: Nelson Izquierdo (410) 965-4364.

**Table 2.F3—Number of work years, fiscal years 1992–2001**

Year	Full-time permanent staff <sup>a</sup>	Total work years <sup>b</sup>
1992.....	62,398	68,135
1993.....	61,640	66,623
1994.....	62,434	66,741
1995 <sup>c</sup> .....	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

- 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 1,055 positions that were transferred from the Department of Health and Human Services to SSA when SSA became an independent agency (under Public Law 103-296, Social Security Independence and Program Improvements Act of 1994, effective March 31, 1995).

SOURCE: Social Security Administration's Payroll Reports.

CONTACT: Donna Frocke (410) 965-3094.



**Table 2.F4—Number of Old-Age and Survivors Insurance claims, fiscal year 2001 (in thousands)**

Workload	Total	Worker	Family members and survivors
Beginning-of-year pending .....	176.0	143.7	32.3
Received .....	3,071.1	1,727.6	1,343.5
Processed <sup>a</sup> .....	3,092.7	1,735.5	1,357.2
End-of-year pending .....	154.4	135.8	18.6

a. See Table 6.A1 for data on number of awards.

SOURCES: Office of Systems' Integrated Work Measurement System and the Office of Disability Operations, Division of Direct Service Operations Report.

NOTE: In prior years, the number of claims were from SSA field offices only, but they now come from all offices.

CONTACT: Shirley Hodges (410) 965-0635.

**Table 2.F5—Number of Disability Insurance claims, fiscal year 2001 (in thousands)**

Workload	Total	Worker	Family members and survivors
Beginning-of-year pending .....	381.4	368.3	13.1
Received .....	1,747.6	1,523.4	224.2
Processed <sup>a</sup> .....	1,733.5	1,503.3	230.2
End-of-year pending .....	395.5	388.4	7.1

a. See Table 6.A1 for data on number of awards.

SOURCES: Office of Systems' Integrated Work Measurement System and Office of Disability Operations, Division of Direct Service Operations Report.

NOTE: In prior years, the number of claims were from SSA field offices only, but they now come from all offices.

CONTACT: Shirley Hodges (410) 965-0635.

**Table 2.F6—Number of Supplemental Security Income claims, fiscal year 2001 (in thousands)**

Workload	Total	Aged	Blind or disabled
Beginning-of-year pending .....	415.4	12.8	402.6
Received .....	1,773.6	153.6	1,620.0
Processed <sup>a</sup> .....	1,737.7	153.6	1,584.1
End-of-year pending .....	451.3	12.8	438.5

a. See Table 7.A8 for data on number of awards.

SOURCES: Office of Systems' Integrated Work Measurement System and Office of Disability Operations, Division of Direct Service Operations Report.

NOTE: In prior years, the number of claims were from SSA field offices only, but they now come from all offices.

CONTACT: Shirley Hodges (410) 965-0635.

## 2.F SSA Administrative Data: Service Delivery

**Table 2.F7—Accuracy rates and use of 800 telephone number, fiscal years 1997–2001**

Item	1997	1998	1999	2000	2001
<i>Accuracy rates (percent)</i>					
OASI payments					
Index of dollar accuracy .....	99.8	99.8	99.6	99.6	a
Postentitlement payment change accuracy <sup>b</sup> .....	98.0	98.5	<sup>c</sup> 98.6	98.6	a
Payment review/stewardship results					
Excess payments .....	99.9	99.9	99.8	99.9	a
Underpayments .....	99.9	99.9	99.9	99.9	a
SSI payments <sup>d</sup>					
Index of dollar accuracy <sup>e</sup> .....	93.0	93.9	94.2	94.0	a
Posteligibility .....	a	a	a	a	a
Payment review/stewardship results <sup>f</sup>					
Excess payments .....	94.7	93.5	94.3	94.7	a
Underpayments .....	98.9	98.8	98.3	98.6	a
Disability Insurance benefits <sup>g</sup>					
Initial claims .....	94.0	93.7	94.3	94.2	93.9
Allowances .....	95.9	96.1	96.5	97.0	96.8
Denials .....	93.1	92.3	93.0	92.4	92.0
Reconsideration .....	92.3	91.6	92.3	92.2	91.0
Reversals of denials .....	94.0	95.6	96.0	96.9	96.8
Affirmations of denials .....	92.0	90.9	91.6	91.3	89.9
<i>National 800 number network (1-800-772-1213)</i>					
Number of calls received (millions) .....	75.3	78.9	78.7	76.3	74.8
Average time calls answered (minutes) .....	1.9	2.7	2.0	2.5	2.8

a. Data not available.

b. Represents calendar year data.

c. Preliminary data.

d. Excludes determinations of disability.

e. Prior to FY 1999, percentages exclude errors of less than \$5. Any payments to ineligible beneficiaries are included regardless of the dollar amount of the error.

f. Beginning with FY 2000, the SSI payment review/stewardship results are reported as the percentage of payments free of preventable error.

g. Represents cases free of decisional and documentation errors.

SOURCE: Social Security Administration, Office of Finance, Assessment and Management, Office of Central Operations.

CONTACT: Bob Marks (410) 965-4527 or Jay Garrett (410) 966-1886.

**Table 2.F8—Workload of SSA’s Administrative Law Judges (ALJs), fiscal years 2000–2002**

Item	2000	2001	2002 <sup>a</sup>
Number of ALJs .....	989	919	972
Average monthly hearing dispositions per ALJ .....	42	42	42
Average hearings pending per ALJ .....	348	447	514

a. Estimated data.

SOURCES: Social Security Administration, Office of Hearings and Appeals. Actual data from the Key Workload Indicator Report. Estimated data from the Government Performance and Results Act, Annual Performance Plan.

NOTE: Administrative Law Judge’s availability during fiscal year 2001; excludes Regional Chief ALJs.

CONTACT: Beverly Nateghi (703) 605-8788.

**Table 2.F9—Number of hearing receipts, dispositions, and end-of-year pending cases, fiscal years 2001–2002**

Program	Hearing receipts		Hearing dispositions		End-of-year pending cases	
	2001	2002 <sup>a</sup>	2001	2002 <sup>a</sup>	2001	2002 <sup>a</sup>
Total .....	554,376	591,100	465,228	490,000	435,904	537,004
OASI .....	3,091	3,577	2,468	2,940	3,177	3,814
Disability						
DI .....	186,981	193,054	146,848	148,862	150,592	194,784
SSI .....	147,737	151,013	129,402	140,189	124,497	135,321
DI and SSI .....	139,288	159,329	116,842	117,992	114,119	155,456
Medicare (Parts A and B and adversarial) .....	77,276	84,124	69,663	80,017	43,517	47,624
Black Lung .....	3	3	5	0	2	5

a. Data estimated for 2002.

SOURCES: Social Security Administration, Office of Hearings and Appeals. Actual data from the Key Workload Indicator Report. Estimated data from the Government Performance and Results Act, Annual Performance Plan.

CONTACT: Beverly Nateghi (703) 605-8788.

**Table 2.F10—Number of civil litigation cases, fiscal year 2001**

Program	New cases	Court decisions <sup>a</sup>	Affirmations	Reversals	Dismissals	End-of-year pending cases
Total .....	16,014	11,729	3,581	717	677	30,185
OASI .....	128	133	46	5	26	281
Disability						
DI .....	5,964	4,222	1,317	291	198	11,249
SSI .....	4,469	3,304	990	163	223	8,267
DI and SSI .....	5,451	4,066	1,228	258	226	10,363
SSI nondisability .....	2	4	0	0	4	25
Black Lung .....	0	0	0	0	0	0

a. Includes 6,754 remands that may not be a final court decision.

SOURCE: U.S. District Courts and Courts of Appeal case data.

CONTACT: Jack Sacchetti (410) 965-3177.

**Table 2.F11—Number of SSA Appeals Council cases, fiscal years 2000–2002**

Cases	2000	2001	2002 <sup>a</sup>
Beginning-of-year pending .....	146,564	127,190	95,355
Receipts .....	100,950	78,833	86,000
Dispositions .....	134,191	110,668	139,431
End-of-year pending .....	113,323	95,355	41,924

a. Estimated data.

SOURCES: Social Security Administration, Office of Hearings and Appeals. Actual data from the Key Workload Indicator Report. Estimated data from the Government Performance and Results Act, Annual Performance Plan.

CONTACT: Beverly Nateghi (703) 605-8788.

### 3.A Social Welfare Expenditures

**Table 3.A1—Gross domestic product (GDP) and social welfare expenditures under public programs, selected fiscal years 1965–1995**

Item	1965	1970	1975	1980	1985	1990 <sup>a</sup>	1992 <sup>a</sup>	1993 <sup>a</sup>	1994 <sup>a</sup>	1995
<i>Amount (millions of dollars)</i>										
Gross domestic product.....	701,000	1,023,100	1,590,800	2,718,900	4,108,000	5,682,900	6,149,300	6,476,600	6,837,100	7,186,900
Total social welfare expenditures <sup>b</sup> .....	77,084	145,979	288,967	492,213	731,840	1,048,951	1,266,504	1,366,743	1,435,714	1,505,136
Social insurance.....	28,123	54,691	123,013	229,754	369,595	513,822	618,938	659,210	683,779	705,483
Public aid.....	6,283	16,488	41,447	72,703	98,362	146,811	207,953	221,000	238,025	253,530
Health and medical programs.....	6,155	10,030	16,535	26,762	38,643	61,684	70,143	74,706	80,130	85,507
Veterans' programs.....	6,031	9,078	17,019	21,466	27,042	30,916	35,642	36,378	37,895	39,072
Education.....	28,108	50,846	80,834	121,050	172,048	258,332	292,145	331,997	344,091	365,625
Housing.....	318	701	3,172	6,879	12,598	19,468	20,151	20,782	27,032	29,361
Other social welfare.....	2,066	4,145	6,947	13,599	13,552	17,918	21,532	22,670	24,762	26,558
All health and medical care <sup>c</sup> .....	9,302	24,801	51,022	99,145	170,665	274,472	353,174	381,710	408,780	435,075
<i>As a percentage of gross domestic product</i>										
Gross domestic product.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Total social welfare expenditures.....	11.0	14.3	18.2	18.1	17.8	18.5	20.6	21.1	21.0	20.9
Social insurance.....	4.0	5.3	7.7	8.5	9.0	9.0	10.1	10.2	10.0	9.8
Public aid.....	0.9	1.6	2.6	2.7	2.4	2.6	3.4	3.4	3.5	3.5
Health and medical programs.....	0.9	1.0	1.0	1.0	0.9	1.1	1.1	1.2	1.2	1.2
Veterans' programs.....	0.9	0.9	1.1	0.8	0.7	0.5	0.6	0.6	0.6	0.5
Education.....	4.0	5.0	5.1	4.5	4.2	4.5	4.8	5.1	5.0	5.1
Housing.....	<sup>d</sup>	0.1	0.2	0.3	0.3	0.3	0.3	0.3	0.4	0.4
Other social welfare.....	0.3	0.4	0.4	0.5	0.3	0.3	0.4	0.4	0.4	0.4
All health and medical care.....	1.3	2.4	3.2	3.6	4.2	4.8	5.7	5.9	6.0	6.1

a. Revised data.

b. Represents program and administrative expenditures from federal, state and local public revenues and trust funds under public law. Includes workers' compensation and temporary disability insurance payments made through private carriers and self-insurers. Includes capital outlay and some expenditures abroad.

c. Combines "health and medical programs" with medical services provided in connection with social insurance, public aid, veterans', and "other social welfare" categories.

d. Less than 0.05 percent.

SOURCES: Gross domestic product data from Department of Commerce, *Survey of Current Business*.

GDP figures revised in 1996 to reflect changes in the source data.

Social welfare expenditures data taken or estimated from *Federal Budgets, Census of Governments*, and reports of administering agencies.

NOTES: See Table 3.A3 for components of individual categories.

Through 1976, fiscal year ended June 30 for federal government, most states, and some localities.

Beginning in 1977, federal fiscal year ended September 30.

CONTACT: Martynas Ycas (202) 358-6215.

**The series Social Welfare Expenditures Under Public Programs in the United States is undergoing review and revision.**

**Table 3.A3—Social welfare expenditures under public programs, selected fiscal years 1965–1995<sup>a</sup> (in millions of dollars)**

Item	1965	1970	1975	1980	1985	1990 <sup>b</sup>	1992 <sup>b</sup>	1993 <sup>b</sup>	1994 <sup>b</sup>	1995
Total .....	77,058.0	145,979.2	288,966.0	492,212.7	731,840.1	1,048,950.8	1,266,502.8	1,366,743.1	1,435,714.3	1,505,136.4
Social insurance .....	28,122.8	54,691.2	123,013.1	229,754.4	369,595.2	513,821.8	618,938.1	659,209.9	683,778.7	705,483.3
OASDI <sup>c</sup> .....	16,997.5	36,835.4	78,429.9	152,110.4	257,535.1	355,264.5	416,564.0	449,276.8	477,339.7	496,355.8
Health Insurance (Medicare) <sup>d</sup> .....	...	7,149.0	14,781.4	34,991.5	71,384.3	109,709.0	132,246.3	148,093.5	161,392.7	164,713.3
Railroad Retirement <sup>c</sup> .....	1,128.1	1,609.9	3,085.1	4,768.7	6,275.6	7,229.9	7,737.1	7,920.6	8,025.2	8,106.2
Public employee retirement <sup>e</sup> .....	4,528.5	8,658.7	20,118.6	39,490.2	63,044.0	90,391.2	103,698.7	112,559.5	119,253.1	128,001.8
Unemployment insurance and employment service <sup>f</sup> .....	3,002.6	3,819.5	13,835.9	18,326.4	18,343.8	19,973.7	41,166.0	40,720.8	31,251.1	26,302.0
Railroad unemployment insurance .....	76.7	38.5	41.6	155.4	138.4	64.6	67.4	60.3	53.5	48.4
Railroad temporary disability insurance .....	46.5	61.1	32.9	68.7	50.6	40.3	27.5	25.9	29.3	30.0
State temporary disability insurance <sup>g</sup> .....	483.5	717.7	990.0	1,377.4	1,944.1	3,224.2	4,009.4	3,316.0	3,200.8	3,189.1
Workers' compensation <sup>h</sup> .....	1,859.4	2,950.4	6,479.1	13,457.2	22,263.6	37,633.4	45,668.0	45,330.0	44,626.0	43,450.0
Public aid .....	6,283.5	16,487.8	41,446.6	72,703.1	98,361.8	146,811.1	207,953.0	220,999.8	238,025.3	253,530.0
Public assistance <sup>i</sup> .....	5,874.9	14,433.5	27,409.4	45,064.3	66,170.2	105,093.8	152,018.2	160,625.0	171,755.1	187,219.0
Supplemental Security Income <sup>j</sup> .....	...	...	6,091.6	8,226.5	11,840.0	17,230.4	23,423.2	26,506.2	30,085.5	30,138.0
Food Stamps .....	35.6	577.0	4,693.9	9,083.3	12,512.7	16,254.5	23,232.9	24,496.7	25,273.6	25,319.0
Other <sup>k</sup> .....	373.0	1,477.3	3,251.7	10,329.0	7,838.9	8,232.4	9,278.7	9,371.9	10,911.1	10,854.0
Health and medical programs <sup>l</sup> .....	6,129.0	10,030.0	16,535.0	26,762.0	38,643.0	61,684.0	70,143.0	74,706.0	80,130.0	85,507.0
Hospital and medical care <sup>m</sup> .....	3,391.0	5,407.0	8,729.0	12,286.0	16,373.0	25,971.0	28,697.0	30,617.0	31,562.0	31,904.0
Maternal and child health program <sup>n</sup> .....	239.0	450.0	567.0	870.0	1,222.0	1,865.0	2,106.0	2,185.0	2,272.0	2,348.0
Medical research .....	1,227.0	1,684.0	2,648.0	4,924.0	6,903.0	10,848.0	12,599.0	12,779.0	13,988.0	14,982.0
School health (education agencies) .....	140.0	247.0	352.0	575.0	790.0	1,113.0	1,230.0	1,309.0	1,384.0	1,667.0
Other public health activities .....	614.0	1,312.0	2,727.0	6,484.0	11,223.0	19,354.0	22,976.0	24,772.0	27,685.0	30,808.0
Medical facilities construction .....	518.0	930.0	1,512.0	1,623.0	2,132.0	2,533.0	2,535.0	3,044.0	3,239.0	3,798.0
Veterans' programs .....	6,031.1	9,078.1	17,018.9	21,465.5	27,042.3	30,916.2	35,642.0	36,378.3	37,894.8	39,072.0
Pensions and compensation <sup>o</sup> .....	4,141.4	5,393.8	7,578.5	11,306.0	14,333.0	15,792.6	16,539.3	17,205.2	17,481.0	18,074.0
Health and medical programs .....	1,228.7	1,784.1	3,516.8	6,203.9	9,493.2	12,004.1	15,442.0	15,410.5	16,231.4	16,654.4
Education .....	40.9	1,018.5	4,433.8	2,400.7	1,170.8	522.8	772.0	937.7	1,098.3	1,118.2
Life insurance <sup>p</sup> .....	434.3	502.3	556.1	664.5	795.5	1,037.8	1,113.7	904.7	971.5	946.3
Welfare and other .....	185.8	379.4	933.7	890.4	1,249.8	1,558.9	1,775.0	1,920.2	2,112.6	2,282.7
Education .....	28,107.8	50,845.5	80,834.1	121,049.6	172,047.5	258,331.6	292,144.6	331,996.8	344,091.0	365,625.3
Housing .....	318.1	701.2	3,171.7	6,879.0	12,598.5	19,468.5	20,150.6	20,782.3	27,032.0	29,361.1
Other social welfare .....	2,065.7	4,145.4	6,946.6	13,599.1	13,551.8	17,917.6	21,531.5	22,670.0	24,762.5	26,557.7
Vocational rehabilitation <sup>q</sup> .....	210.5	703.8	1,036.4	1,251.1	1,536.7	2,126.6	2,446.8	2,379.1	2,560.1	2,630.3
Institutional care <sup>r</sup> .....	789.5	201.8	296.1	482.4	379.6	629.4	684.4	721.5	783.1	874.0
Child nutrition programs <sup>s</sup> .....	617.4	896.0	2,517.6	4,852.3	5,308.5	7,165.4	8,775.8	9,392.4	10,099.1	10,653.4
Child welfare <sup>t</sup> .....	354.3	585.4	597.0	800.0	200.0	252.6	273.9	294.6	294.6	292.0
Special OEO and ACTION programs <sup>u</sup> .....	51.7	752.8	638.3	2,302.7	503.8	169.4	193.8	208.3	204.4	222.0
Social welfare, not elsewhere classified <sup>v</sup> .....	42.3	1,005.6	1,861.2	3,910.6	5,623.2	7,574.2	9,156.8	9,674.1	10,821.2	11,886.0

- a. Expenditures from federal, state, and local revenues and trust funds under public law; includes capital outlays and administrative expenditures unless otherwise noted. Includes some payments abroad. Through 1976, fiscal year ended June 30 for federal government, most states, and some localities; for federal government, beginning in 1977, fiscal year ends September 30.
- b. Revised data.
- c. Excludes financial interchange between OASDI and Railroad Retirement.
- d. Hospital Insurance and Supplementary Medical Insurance. Included in total shown directly above.
- e. Excludes refunds of employee contributions; includes payments to retired military personnel and survivors. Administrative expenses for federal noncontributory retirement not available.
- f. Includes unemployment compensation under state programs, programs for federal military and civilian employees and trade adjustment and cash training allowances, and payments under extended, emergency, disaster, and special unemployment insurance programs.
- g. Cash and medical benefits in five areas; includes private plans where applicable and state costs of administering state plans and supervising private plans. Administrative expenses of private plans and all data for Hawaii not available.
- h. Cash and medical benefits paid under federal and state laws by private insurance carriers, state funds, and self-insurers. Beginning in 1959–1960, includes Alaska and Hawaii. Administrative costs of private carriers and self-insurers not available. Beginning in 1969–1970, includes federal "black lung" benefit program.
- i. Categorical cash and medical payments under the Social Security Act, and general assistance from state and local funds. Beginning in 1968–1969, includes work-incentive activities.
- j. Income-maintenance payments began in Jan. 1974.
- k. Work relief, other emergency aid, surplus food for the needy, repatriate and refugee assistance, and work-experience training programs. Beginning 1974 includes Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) program. Beginning in 1981, includes Low-Income Home Energy Assistance.
- l. Excludes state and local expenditures for domiciliary care in institutions other than mental and tuberculosis, and services in connection with OASDI, state temporary disability insurance, workers' compensation, public assistance, vocational rehabilitation, and veterans' programs which are included in expenditures for these programs.
- m. Civilian and Department of Defense programs (including medical care provided to military dependents).
- n. Includes services for disabled children.
- o. Includes burial awards. Beginning in 1964–1965, includes special allowances for survivors of veterans who did not qualify under OASDI. Beginning in 1973–1974, subsistence payments to disabled veterans undergoing training shifted from the pensions and compensation to the education subgroup.
- p. Excludes the service persons' group life insurance program.
- q. Beginning in 1973–1974, excludes administrative expenses.
- r. Federal expenditures represent primarily surplus food for institutions.
- s. Surplus food for schools and programs under National School Lunch and Child Nutrition Acts.
- t. Represents primarily child welfare services under the Social Security Act. Beginning in 1968–1969, excludes administrative expenses.
- u. Includes domestic programs consolidated in 1971–1972 under ACTION and special Office of Economic Opportunity programs. Beginning 1988, represents ACTION funds only.
- v. Federal expenditures include administrative and related expenses of the Secretary of Health and Human Services; Indian welfare and guidance, aging and juvenile delinquency, and certain manpower and human development activities. State and local expenditures include amounts for antipoverty and manpower programs, day care, child placement and adoption services, foster care, legal assistance, care of transients, and other unspecified welfare services; before 1969–1970, these amounts were included with institutional care.

SOURCE: Data taken or estimated from *Federal Budgets*, *Census of Governments*, and reports of administrative agencies.

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**The series Social Welfare Expenditures Under Public Programs in the United States is undergoing review and revision.**

### 3.A Social Welfare Expenditures

**Table 3.A4—Private social welfare expenditures, by category and as a percentage of gross domestic product (GDP), selected years 1980–1994 (in millions)**

Category	1980	1987	1988	1989	1990	1991	1992	1993	1994
<i>Amount (millions of dollars)</i>									
Private social welfare expenditures .....	251,938	549,423	606,377	676,424	729,989	774,096	840,192	887,555	924,994
Health <sup>a</sup> .....	142,463	292,965	333,128	369,844	413,145	440,978	477,024	505,086	528,600
Personal health care.....	130,026	273,030	307,110	336,005	373,691	399,617	431,456	452,346	469,900
Income maintenance.....	53,519	143,359	148,533	166,885	164,397	170,307	186,655	194,119	204,736
Private pension payments .....	37,560	120,442	124,546	140,911	137,739	142,924	158,487	165,097	174,452
Life insurance .....	5,075	8,166	8,418	9,063	9,278	9,472	9,866	10,276	11,229
Short-term sickness and disability benefits ..	8,630	11,822	12,789	13,616	13,680	13,787	14,566	15,389	15,901
Long-term disability .....	1,282	2,293	2,295	2,892	2,926	3,172	3,143	2,900	2,895
Supplemental unemployment.....	972	636	485	403	774	952	593	457	259
Education <sup>b</sup> .....	33,180	65,498	72,137	80,383	87,864	93,813	100,491	107,451	105,361
Welfare and other services.....	22,776	47,601	52,579	59,312	64,583	68,998	76,022	80,899	86,297
<i>As a percentage of gross domestic product</i>									
Total social welfare expenditures <sup>c</sup> .....	27.4	29.1	29.2	29.6	31.3	32.9	34.3	34.8	34.5
Public <sup>d</sup> .....	18.6	18.7	18.5	18.5	18.5	19.8	20.6	21.1	21.8
Private <sup>e</sup> .....	9.3	11.7	12.0	12.4	12.8	13.2	13.6	13.7	13.5

a. Includes program administration and net cost of health insurance, research, and construction of medical facilities.

b. Includes construction.

c. Represents sum of public and private expenditures as a percent of GDP, after adjustment for elimination of overlap. The overlap occurs when payments received under public or private income-maintenance programs are used to purchase medical care, educational services, or residential care.

d. Represents fiscal year expenditures as a percent of federal fiscal year GDP.

e. Represents calendar year expenditures as a percent of calendar year GDP.

SOURCE: Various agency reports and privately compiled sources.

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**The series Social Welfare Expenditures Under Private Programs in the United States is undergoing review and revision.**

**Table 3.B3—Federal minimum wage rates under the Fair Labor Standards Act and average hourly earnings and average weekly hours for production workers in manufacturing, selected years 1938–2001**

Effective date	Minimum hourly wage for workers in jobs first covered by—				Average for 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>		Gross hourly earnings (dollars)	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
1998 <sup>e</sup> .....	5.15	5.15	5.15	5.15	13.49	41.7
1999 <sup>e</sup> .....	5.15	5.15	5.15	5.15	13.91	41.7
2000 <sup>e</sup> .....	5.15	5.15	5.15	5.15	14.38	41.6
2001 <sup>e</sup> .....	5.15	5.15	5.15	5.15	14.83	40.7

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.

SOURCE: Department of Labor, Bureau of Labor Statistics.

NOTE: . . . = not applicable.

CONTACT: Greg Diez (410) 965-0153.

### 3.C Interprogram Data

**Table 3.C3—Selected social insurance programs: Source of funds from contributions, selected years 1965–2001**  
(in millions of dollars)

Program and source	1965	1970	1975	1980	1985	1990	1995	1997	1998	1999	2000	2001
<b>Social Security Trust Funds</b>												
<b>Old-Age and Survivors</b>												
Insurance <sup>a</sup> .....	16,017	30,257	56,815	103,456	178,010	270,507	309,906	357,104	380,113	407,023	432,977	453,354
Employer.....	7,618	14,489	27,184	49,731	83,682	125,272	143,978	165,563	176,564	188,461	200,431	210,659
Employee.....	7,440	14,204	26,947	49,436	83,400	124,481	143,335	164,667	174,786	187,160	198,736	207,999
Self-employed.....	959	1,564	2,684	4,289	7,720	15,906	17,103	19,448	19,614	20,503	22,216	22,793
Taxation of benefits.....	...	...	...	...	3,208	4,848	5,490	7,426	9,149	10,899	11,594	11,903
Disability Insurance <sup>a</sup> .....	1,188	4,481	7,444	13,255	17,204	28,498	54,695	56,473	59,485	63,827	71,813	75,743
Employer.....	564	2,154	3,562	6,307	8,119	13,414	25,665	26,437	28,064	29,936	33,971	35,759
Employee.....	551	2,117	3,530	6,254	8,087	13,338	25,545	26,279	27,772	29,730	33,701	35,312
Self-employed.....	73	210	352	694	776	1,602	3,144	3,287	3,091	3,500	3,420	3,861
Taxation of benefits.....	...	...	...	...	222	144	341	470	558	661	721	811
<b>Medicare Trust Funds</b>												
<b>Hospital Insurance<sup>a</sup>.....</b>												
Employer.....	...	4,880	11,510	23,866	47,173	71,753	103,301	119,546	130,700	140,306	154,520	160,896
Employee.....	...	2,379	5,578	11,591	22,613	33,850	45,839	53,345	57,849	61,826	67,526	71,181
Self-employed.....	...	2,332	5,530	11,518	22,549	33,635	45,852	53,348	57,849	61,826	67,526	71,181
Voluntarily insured <sup>b</sup> .....	...	169	395	739	1,970	4,146	6,743	7,976	8,619	8,655	9,299	9,631
Taxation of benefits.....	...	...	7	18	41	122	954	1,319	1,316	1,447	1,382	1,370
Supplementary Medical Insurance <sup>a,c</sup> .....	...	...	...	...	...	...	3,913	3,558	5,067	6,552	8,787	7,533
Aged.....	...	1,096	1,917	3,011	5,613	11,319	19,717	19,289	20,932	18,966	20,556	22,764
Disabled.....	...	1,096	1,759	2,707	5,105	10,311	17,651	17,079	18,594	16,604	17,892	19,905
Railroad Retirement <sup>d</sup> .....	647	968	1,506	2,630	4,626	4,316	4,032	4,273	e	e	e	e
Employer.....	315	510	1,146	1,722	2,417	2,512	2,592	2,707	e	e	e	e
Employee.....	315	439	356	594	1,110	1,209	1,265	1,355	e	e	e	e
Self-employed.....	17	19	4	313	1,099	595	175	211	e	e	e	e
Federal Civil Service <sup>f</sup> .....	2,197	3,870	9,507	19,986	27,160	31,869	37,628	39,745	e	e	e	e
Employer.....	1,123	2,001	6,905	16,220	22,472	27,368	33,174	35,376	e	e	e	e
Employee.....	1,073	1,869	2,600	3,766	4,688	4,501	4,454	4,369	e	e	e	e
State and local government <sup>g</sup> .....	4,225	7,895	14,560	25,654	37,455	41,700	59,611	e	e	e	e	e
Employer.....	2,525	4,920	9,880	18,776	27,699	29,300	41,011	e	e	e	e	e
Employee.....	1,700	2,975	4,680	6,878	9,756	12,400	18,600	e	e	e	e	e

a. For OASDI and HI contribution rates and wage base, see Table 2.A3. Beginning in 1952 (1959 for DI, 1968 for HI) employer and employee contributions differ by estimated amount of refunds of employee tax overpayments and, beginning in 1966, by employee tax on tips. For SMI premium rates, see Table 2.C1.

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.

d. Beginning in 1966, excludes HI contributions and includes employer contributions to supplemental benefit account.

e. Data not available.

f. Employer share represents federal and District of Columbia government contributions; employee share includes voluntary contributions to purchase additional annuity. Beginning in 1980, estimated by the Social Security Administration from fiscal year data.

g. Estimated by Social Security Administration from U.S. Census Bureau fiscal year data. Employer share represents government contribution.

SOURCE: Department of the Treasury and U.S. Census Bureau, 100 percent data.

NOTE: . . . = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013 or Martynas Ycas (202) 358-6215.



**Table 3.C4—Average monthly amount of Social Security and selected public assistance programs: December 1950–2001 (in current and 2001 dollars)**

Year	Consumer price index, all items <sup>a</sup> (1982-1984 = 100)	Average monthly Social Security benefit in current-payment status				Average monthly amount per recipient under—			
		Retired workers		Widowed mother or father and 2 children		Old-Age Assistance/ Supplemental Security Income <sup>b</sup>		Temporary Assistance for Needy Families <sup>c</sup>	
		Current dollars	2001 dollars	Current dollars	2001 dollars	Current dollars	2001 dollars	Current dollars	2001 dollars
1950	25.0	43.86	310.00	93.90	663.69	43.05	304.28	20.85	147.37
1951	26.5	42.14	280.99	93.80	625.45	44.55	297.06	22.00	146.69
1952	26.7	49.25	325.94	106.00	701.51	48.80	322.96	23.45	155.19
1953	26.9	51.10	335.66	111.90	735.05	48.90	321.21	23.20	152.40
1954	26.7	59.14	391.39	130.50	863.65	48.70	322.30	23.25	153.87
1955	26.8	61.90	408.12	135.40	892.73	50.05	329.99	23.50	154.94
1956	27.6	63.09	403.91	141.00	902.71	53.25	340.92	24.80	158.77
1957	28.4	64.58	401.81	146.30	910.25	55.50	345.31	25.40	158.03
1958	28.9	66.35	405.68	151.70	927.52	56.95	348.20	26.65	162.94
1959	29.4	72.78	437.42	170.70	1025.94	56.70	340.78	27.30	164.08
1960	29.8	74.04	439.02	188.00	1,114.75	58.90	349.25	28.35	168.10
1961	30.0	75.65	445.58	189.30	1,114.98	57.60	339.26	29.45	173.46
1962	30.4	76.19	442.85	190.70	1,108.44	61.55	357.76	29.30	170.31
1963	30.9	76.88	439.63	192.50	1,100.80	62.80	359.12	29.70	169.84
1964	31.2	77.57	439.31	193.40	1,095.31	63.65	360.48	31.50	178.40
1965	31.8	83.92	466.31	219.80	1,221.34	63.10	350.62	32.85	182.53
1966	32.9	84.35	453.03	221.90	1,191.79	68.05	365.48	36.25	194.69
1967	33.9	85.37	444.98	224.40	1,169.66	70.15	365.65	39.50	205.89
1968	35.5	98.86	492.07	257.10	1,279.71	69.55	346.18	44.75	222.74
1969	37.7	100.40	470.58	255.80	1,198.94	73.90	346.37	45.15	211.62
1970	39.8	118.10	524.33	291.10	1,292.40	77.65	344.74	50.30	223.32
1971	41.1	132.17	568.23	320.00	1,375.77	77.50	333.19	52.30	224.85
1972	42.5	162.35	674.99	383.10	1,592.79	79.95	332.40	54.10	224.93
1973	46.2	166.42	636.50	391.00	1,495.45	76.15	291.25	56.95	217.82
1974	51.9	188.21	640.78	438.40	1,492.59	91.06	310.03	63.37	215.75
1975	55.5	207.18	659.62	468.60	1,491.92	90.93	289.50	69.69	221.88
1976	58.2	224.86	682.69	503.40	1,528.36	94.37	286.52	75.20	228.31
1977	62.1	243.00	691.43	546.60	1,555.30	96.62	274.92	80.08	227.86
1978	67.7	263.20	686.96	591.90	1,544.89	100.43	262.13	83.60	218.20
1979	76.7	294.30	678.00	655.00	1,508.98	122.67	282.60	90.34	208.12
1980	86.3	341.40	699.02	759.20	1,554.47	128.20	262.49	97.10	198.81
1981	94.0	385.97	725.54	858.00	1,612.86	137.81	259.05	103.15	193.90
1982	97.6	419.30	759.12	885.50	1,603.15	145.69	263.76	106.33	192.51
1983	101.3	440.77	768.85	923.00	1,610.01	157.89	275.41	109.93	191.75
1984	105.3	460.57	772.87	948.30	1,591.31	157.88	264.93	114.72	192.51
1985	109.3	478.62	773.76	981.50	1,586.74	164.26	265.55	118.17	191.04
1986	110.5	488.44	781.06	994.00	1,589.50	173.66	277.70	122.09	195.23
1987	115.4	512.65	784.97	1,032.30	1,580.65	180.64	276.60	125.19	191.69
1988	120.5	536.77	787.11	1,070.40	1,569.62	188.23	276.02	130.30	191.07
1989	126.1	566.85	794.31	1,120.04	1,569.48	198.81	278.59	131.89	184.81
1990	133.8	602.56	795.76	1,177.70	1,555.30	212.66	280.84	135.96	179.55
1991	137.9	629.32	806.39	1,216.76	1,559.11	221.30	283.57	134.98	172.96
1992	141.9	652.64	812.70	1,252.40	1,559.54	227.39	283.16	132.92	165.52
1993	145.8	674.06	816.92	1,282.60	1,554.43	236.52	286.65	132.87	161.03
1994	149.7	697.34	823.11	1,328.40	1,567.99	242.54	286.28	133.71	157.83
1995	153.5	719.80	828.59	1,365.50	1,571.88	250.65	288.53	134.35	154.66
1996	158.6	744.96	829.98	1,450.60	1,616.15	260.75	290.51	133.53	148.77
1997	161.3	774.84	848.82	1,502.60	1,646.06	268.46	294.09	170.71	187.01
1998	163.9	779.69	840.58	1,537.70	1,657.79	277.45	299.12	197.80	213.25
1999	168.3	804.30	844.44	1,590.40	1,669.78	289.19	303.62	236.16	247.95
2000	174.0	844.48	857.58	1,675.40	1,701.40	299.69	304.34	151.32	153.67
2001	176.7	874.44	874.44	1,755.10	1,755.10	299.69	299.69	158.43	158.43

a. Data from Bureau of Labor Statistics, consumer price index for all urban consumers (CPI-U).

b. Beginning in 1974, represents payments to the aged under the SSI program.

c. Effective July 1, 1997, the Temporary Assistance for Needy Families (TANF) block grant program replaced the Aid to Families with Dependent Children (AFDC) program. Beginning in 1997, payments include services.

SOURCES: Social Security Administration, Supplemental Security Record, and the Department of Health and Human Services, 100 percent data.

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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 rank, December 1940–2001, 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 or 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
1996	907	...	61	...	38	931	4.2	61.7
1997	913	...	60	...	37	955	4.0	61.4
1998	906	...	59	...	36	929	3.9	60.5
1999	908	...	58	...	35	927	3.8	59.7
2000	911	...	57	...	34	934	3.7	59.1
2001								
Alabama	908	...	56	...	33	931	3.6	58.4
Alaska	925	28	73	6	58	940	6.3	79.9
Arizona	928	26	59	12	27	960	2.9	45.9
Arkansas	828	50	31	32	19	841	2.2	59.6
California	913	36	61	11	51	923	5.6	83.3
Colorado	856	48	132	1	63	924	7.4	48.3
Connecticut	910	37	32	29	19	923	2.1	59.2
Delaware	950	9	26	37	12	964	1.3	47.0
District of Columbia	931	23	23	42	15	938	1.6	66.0
Florida	803	51	70	9	43	831	5.3	61.0
Georgia	845	49	46	21	24	867	2.8	52.2
Hawaii	908	38	70	8	52	926	5.7	73.6
Idaho	886	45	53	17	22	918	2.4	41.0
Illinois	955	6	20	43	15	960	1.6	75.9
Indiana	919	32	38	25	16	940	1.8	42.9
Iowa	947	10	17	48	12	952	1.3	70.1
Kansas	955	7	17	49	13	960	1.3	72.5
Kentucky	934	21	19	45	12	941	1.3	64.3
Louisiana	924	30	72	7	54	942	5.8	74.8
Maine	898	41	81	4	60	919	6.6	74.1
Maryland	943	12	32	30	26	949	2.8	82.5
Massachusetts	881	47	40	23	20	901	2.3	49.2
Michigan	918	33	57	15	33	943	3.6	57.5
Minnesota	961	3	30	34	18	973	1.9	59.8
Mississippi	941	14	26	38	13	953	1.4	51.9
Missouri	913	35	108	2	87	934	9.5	80.6
Montana	934	20	30	35	22	942	2.3	72.4
Nebraska	929	24	20	44	16	934	1.7	77.0
Nevada	942	13	18	47	12	948	1.3	70.2
New Hampshire	892	43	32	31	18	905	2.1	58.6
New Jersey	969	1	12	51	8	973	0.9	69.9
New Mexico	925	29	45	22	21	950	2.2	46.1
New York	883	46	69	10	48	904	5.4	69.0
North Carolina	894	42	90	3	42	943	4.7	46.3
North Dakota	939	15	57	16	44	951	4.7	78.5
Ohio	946	11	23	41	17	952	1.8	74.5
Oklahoma	937	16	24	39	15	946	1.6	60.6
Oregon	923	31	39	24	29	933	3.1	74.0
Pennsylvania	959	4	27	36	16	970	1.6	57.8
Rhode Island	935	17	34	28	21	948	2.3	62.5
South Carolina	929	25	50	18	32	947	3.4	63.0
South Dakota	917	34	58	13	46	930	5.0	78.6
Tennessee	954	8	30	33	21	963	2.2	69.6
Texas	932	22	58	14	44	946	4.7	76.5
Utah	886	44	75	5	52	910	5.8	68.6
Vermont	902	40	18	46	9	911	1.0	50.3
Virginia	934	19	36	26	30	940	3.3	83.3
Washington	902	39	47	19	30	919	3.3	63.2
West Virginia	934	18	36	27	15	956	1.6	41.2
Wisconsin	925	27	47	20	33	940	3.5	69.9
Wyoming	962	2	23	40	16	969	1.6	66.3

a. 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.

SOURCES: Social Security Administration, Master Beneficiary Record and Supplemental Security Record, and the U.S. Census Bureau, 100 percent data.

NOTE: ... = not applicable.

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

**Table 3.C6—Number and percentage of Social Security (OASDI) beneficiaries also receiving federally administered Supplemental Security Income (SSI) payments, by SSI eligibility category and type of OASDI benefit, December 2001**

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 .....	45,874,010	2,393,440	729,050	1,664,390	5.2	1.6	3.6
Retirement .....	32,052,750	1,054,440	576,070	478,370	3.3	1.8	1.5
Workers aged 65 or older .....	26,278,270	784,770	515,340	269,430	3.0	2.0	1.0
Men .....	13,601,650	299,930	190,690	109,240	2.2	1.4	0.8
Women .....	12,676,620	484,840	324,650	160,190	3.8	2.6	1.3
Workers aged 62–64 .....	2,570,130	39,040	0	39,040	1.5	0	1.5
Men .....	1,332,710	24,510	0	24,510	1.8	0	1.8
Women .....	1,237,420	14,530	0	14,530	1.2	0	1.2
Wives and husbands .....	2,737,720	128,070	60,690	67,380	4.7	2.2	2.5
Aged 65 or older .....	2,391,410	115,390	60,690	54,700	4.8	2.5	2.3
Aged 62–64 .....	298,740	11,370	0	11,370	3.8	0	3.8
Under age 62 with children .....	47,570	1,310	0	1,310	2.8	0	2.8
Disabled adult children .....	192,450	98,480	40	98,440	51.2	0	51.2
Aged 65 or older .....	980	370	40	330	37.8	4.1	33.7
Aged 18–64 .....	191,470	98,110	0	98,110	51.2	0	51.2
Children under age 18 and students aged 18–19 .....	274,180	4,080	0	4,080	1.5	0	1.5
Survivors .....	6,914,800	479,100	151,980	327,120	6.9	2.2	4.7
Nondisabled widow(er)s .....	4,623,310	255,940	148,790	107,150	5.5	3.2	2.3
Aged 65 or older .....	4,170,360	247,860	148,790	99,070	5.9	3.6	2.4
Aged 60–64 .....	452,950	8,080	0	8,080	1.8	0	1.8
Disabled widow(er)s .....	203,400	38,010	0	38,010	18.7	0	18.7
Widowed mothers and fathers .....	195,160	5,380	70	5,310	2.8	<sup>b</sup>	2.7
Parents .....	2,650	210	190	20	7.9	7.2	0.8
Disabled adult children .....	490,050	158,880	2,930	155,950	32.4	0.6	31.8
Aged 65 or older .....	63,960	21,860	2,930	18,930	34.2	4.6	29.6
Aged 18–64 .....	426,090	137,020	0	137,020	32.2	0	32.2
Children under age 18 and students aged 18–19 .....	1,400,230	20,680	0	20,680	1.5	0	1.5
Disability .....	6,906,460	859,900	1,000	858,900	12.5	0	12.4
Workers under age 65 .....	5,258,610	768,630	0	768,630	14.6	0	14.6
Men .....	2,947,550	345,060	0	345,060	11.7	0	11.7
Women .....	2,311,060	423,570	0	423,570	18.3	0	18.3
Wives and husbands .....	157,430	11,070	1,000	10,070	7.0	0.6	6.4
Aged 65 or older .....	22,430	3,220	1,000	2,220	14.4	4.5	9.9
Aged 62–64 .....	29,700	1,920	0	1,920	6.5	0	6.5
Under age 62 with children .....	105,300	5,930	0	5,930	5.6	0	5.6
Disabled adult children aged 18–64 .....	59,370	40,790	0	40,790	68.7	0	68.7
Children under age 18 and students aged 18–19 .....	1,431,050	39,410	0	39,410	2.8	0	2.8

a. Excludes 30 special age-72 beneficiaries.

b. Less than 0.5 percent.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Lenna Kennedy (410) 965-9846.

### 3.C Interprogram Data

**Table 3.C6.1—Number of persons aged 18–64 receiving Social Security (OASDI) benefits or federally administered Supplemental Security Income payments based on disability, by type of benefit, December 1978–2001**

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	Persons with—	
							SSI only	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

a. Includes persons receiving OASDI, SSI, or both.

b. The number of OASDI disabled adult child beneficiaries aged 18–64 also receiving SSI was estimated based on 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.

c. 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.

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

CONTACT: Art Kahn (410) 965-0186.

**Table 3.C7—Number of persons aged 15 or older with Social Security (OASDI) benefits or Supplemental Security Income, by sex, age, and race in March 2001, and median annual benefit in 2000**

Sex, age, and median benefit	Total	White	Black	American Indian, Alaska Native	Asian, Pacific Islander
	<b>With Social Security</b>				
Total number in March 2001 (thousands).....	38,436	33,629	3,782	293	732
Sex					
Men .....	16,683	14,682	1,513	136	352
Women .....	21,753	18,947	2,268	157	381
Age					
15-54 .....	4,176	3,197	812	59	108
55-64 .....	4,644	3,985	550	34	74
65-74 .....	15,705	13,875	1,380	125	325
75 or older .....	13,911	12,571	1,039	75	226
Median benefit in 2000 (dollars).....	8,904	8,958	7,326	6,966	7,700
	<b>With Supplemental Security Income</b>				
Total number in March 2001 (thousands).....	4,685	3,193	1,180	77	235
Sex					
Men .....	1,791	1,264	422	24	81
Women .....	2,894	1,929	758	53	154
Age					
15-54 .....	2,651	1,808	748	44	51
55-64 .....	828	593	196	6	33
65-74 .....	650	445	108	15	83
75 or older .....	556	346	129	13	68
Median benefit in 2000 (dollars).....	5,436	5,052	5,760	4,884	6,168

SOURCE: U.S. Census Bureau, Current Population Survey, public use file of the March 2001 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.

CONTACT: Curt Pauzenga (410) 965-7210.

### 3.C Interprogram Data

**Table 3.C8—Number of persons aged 15 or older with Social Security (OASDI) benefits or Supplemental Security Income and number and percentage of Hispanic origin, by age and sex in March 2001, and median annual benefit in 2000**

Age and median benefit	Number (thousands)						Percentage of Hispanic origin <sup>a</sup>		
	Total			Hispanic origin <sup>a</sup>			Total	Men	Women
	Total	Men	Women	Total	Men	Women			
<b>With Social Security</b>									
Total.....	38,436	16,683	21,753	2,201	964	1,237	5.7	5.8	5.7
Age									
15-34.....	1,319	671	648	134	66	67	10.1	9.9	10.4
35-44.....	1,176	481	695	105	36	69	8.9	7.5	9.9
45-54.....	1,680	846	835	132	69	63	7.9	8.1	7.6
55-64.....	4,644	1,997	2,647	357	164	193	7.7	8.2	7.3
65-74.....	15,705	7,218	8,487	864	391	473	5.5	5.4	5.6
75 or older.....	13,911	5,470	8,440	609	238	371	4.4	4.4	4.4
Median benefit in 2000 (dollars).....	8,904	10,646	7,440	7,146	8,442	6,450	...	...	...
<b>With Supplemental Security Income</b>									
Total.....	4,685	1,791	2,894	627	206	421	13.4	11.5	14.5
Age									
15-34.....	968	462	506	94	45	49	9.7	9.7	9.7
35-44.....	840	367	473	82	33	49	9.8	9.0	10.4
45-54.....	843	339	504	97	38	59	11.5	11.1	11.7
55-64.....	828	280	547	106	33	73	12.8	11.9	13.3
65-74.....	650	214	436	128	31	97	19.7	14.3	22.3
75 or older.....	556	128	428	120	26	94	21.6	20.6	21.9
Median benefit in 2000 (dollars).....	5,436	5,724	5,100	5,400	4,776	5,436	...	...	...

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

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of March 2001 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.

CONTACT: Curt Pauzenga (410) 965-7210.

Table 3.E1—Weighted average poverty thresholds for nonfarm families of specified size, 1959–2001

Year	Unrelated individuals (dollars)			Families of 2 persons or more (dollars)								Annual average CPI, all items <sup>a</sup> (1982–84 = 100)
				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	3,448	4,540	5,815	6,876	7,760	9,588	56.9
1977	3,075	3,152	2,906	3,951	4,072	3,666	4,833	6,191	7,320	8,261	10,216	60.6
1978	3,311	3,392	3,127	4,249	4,383	3,944	5,201	6,662	7,880	8,891	11,002	65.2
1979	3,689	3,778	3,479	4,725	4,878	4,390	5,784	7,412	8,775	9,914	12,280	72.6
1980	4,190	4,290	3,949	5,363	5,537	4,983	6,565	8,414	9,966	11,269	13,955	82.4
1981	4,620	4,729	4,359	5,917	6,111	5,498	7,250	9,287	11,007	12,449	...	90.9
1982	4,901	5,019	4,626	6,281	6,487	5,836	7,693	9,862	11,684	13,207	...	96.5
1983	5,061	5,180	4,775	6,483	6,697	6,023	7,938	10,178	12,049	13,630	...	99.6
1984	5,278	5,400	4,979	6,762	6,983	6,282	8,277	10,609	12,566	14,207	...	103.9
1985	5,469	5,593	5,156	6,998	7,231	6,503	8,573	10,989	13,007	14,696	...	107.6
1986	5,572	5,701	5,255	7,138	7,372	6,630	8,737	11,203	13,259	14,986	...	109.6
1987	5,778	5,909	5,447	7,397	7,641	6,872	9,056	11,611	13,737	15,509	...	113.6
1988	6,022	6,155	5,674	7,704	7,958	7,157	9,435	12,092	14,304	16,146	...	118.3
1989	6,310	6,451	5,947	8,076	8,343	7,501	9,885	12,674	14,990	16,921	...	124.0
1990	6,652	6,800	6,268	8,509	8,794	7,905	10,419	13,359	15,792	17,839	...	130.7
1991	6,932	7,086	6,532	8,865	9,165	8,241	10,860	13,924	16,456	18,587	...	136.2
1992	7,143	7,299	6,729	9,137	9,443	8,487	11,186	14,335	16,952	19,137	...	140.3
1993	7,363	7,518	6,930	9,414	9,728	8,740	11,522	14,763	17,449	19,718	...	144.5
1994	7,547	7,710	7,108	9,661	9,976	8,967	11,821	15,141	17,900	20,235	...	148.2
1995	7,763	7,929	7,309	9,933	10,259	9,219	12,158	15,569	18,408	20,804	...	152.4
1996	7,995	8,163	7,525	10,233	10,564	9,491	12,516	16,036	18,952	21,389	...	156.9
1997	8,183	8,350	7,698	10,473	10,805	9,712	12,802	16,400	19,380	21,886	...	160.5
1998	8,316	8,480	7,818	10,634	10,972	9,862	13,003	16,660	19,680	22,228	...	163.0
1999	8,501	8,667	7,990	10,869	11,214	10,075	13,290	17,029	20,127	22,727	...	166.6
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

a. Beginning in January 1978, the Bureau of Labor Statistics introduced a new price index for all urban consumers (CPI-U) that forms a continuous series with the earlier index for urban wage earners and for clerical workers as of December 1977.

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			Year	9 persons or more		
	7 persons	8 persons	9 persons or more		7 persons	8 persons	9 persons or more
1980	12,761	14,199	16,896	1991	21,058	23,605	27,942
1981	14,110	15,655	18,572	1992	21,594	24,053	28,745
1982	15,036	16,719	19,698	1993	22,383	24,838	29,529
1983	15,500	17,170	20,310	1994	22,923	25,427	30,300
1984	16,096	17,961	21,247	1995	23,552	26,237	31,280
1985	16,656	18,512	22,083	1996	24,268	27,091	31,971
1986	17,049	18,791	22,497	1997	24,802	27,593	32,566
1987	17,649	19,515	23,105	1998	25,257	28,166	33,339
1988	18,232	20,253	24,129	1999	25,912	28,967	34,417
1989	19,162	21,328	25,480	2000	26,754	29,701	35,060
1990	20,241	22,582	26,848	2001	27,517	30,627	36,286

CONTACT: Joe Dalaker (301) 763-3213.

### 3.E Poverty

**Table 3.E2—Number and percentage of poor persons, by age, at end of selected years 1959–2000**

Age and family status <sup>a</sup>	1959	1970	1975	1980	1985	1990 <sup>b</sup>	1999	2000
<b>Total population (millions) <sup>c</sup></b>								
All ages .....	176.5	202.5	210.4	225.0	236.6	248.6	273.5	275.9
Children under 18 in families .....	64.0	69.9	64.8	62.2	62.0	64.9	70.5	70.6
With—								
Male householder <sup>d</sup> .....	58.3	60.8	54.1	50.6	49.5	49.5	54.0	54.5
Female householder .....	5.7	9.0	10.6	11.5	12.5	15.4	16.4	16.1
18–54 <sup>e</sup> .....	81.0	94.9	104.7	116.3	125.2	132.3	146.0	147.4
55–64 .....	15.5	18.4	19.8	21.7	22.1	21.3	23.4	23.8
65 or older .....	15.6	19.3	21.7	24.7	27.3	30.1	32.6	33.0
In families .....	11.9	13.4	14.8	16.7	18.4	20.1	22.0	22.3
Unrelated individuals .....	3.7	5.8	6.9	8.0	8.9	10.0	10.6	10.7
Men .....	1.2	1.4	1.5	1.7	2.0	2.3	2.8	2.9
Women .....	2.5	4.4	5.4	6.3	7.0	7.7	7.8	7.8
<b>Number poor <sup>c</sup> (millions)</b>								
All ages .....	39.5	25.3	25.9	29.3	33.1	33.6	32.3	31.1
Children under 18 in families .....	17.2	10.5	10.9	11.1	12.5	13.3	11.5	11.1
With—								
Male householder <sup>d</sup> .....	13.1	5.7	5.3	5.2	5.8	5.3	4.8	4.9
Female householder .....	4.1	4.8	5.6	5.9	6.7	8.0	6.7	6.2
18–54 <sup>e</sup> .....	13.4	8.2	9.7	12.2	14.8	14.6	15.0	14.1
55–64 .....	3.3	2.1	2.0	2.1	2.3	2.1	2.2	2.2
65 or older .....	5.5	4.7	3.3	3.9	3.5	3.7	3.2	3.4
In families .....	3.2	2.0	1.2	1.4	1.2	1.2	1.1	1.1
Unrelated individuals .....	2.3	2.7	2.1	2.4	2.3	2.5	2.1	2.2
Men .....	0.7	0.5	0.4	0.4	0.4	0.4	0.5	0.5
Women .....	1.6	2.2	1.7	2.0	1.9	2.1	1.6	1.7
<b>Percent poor <sup>c</sup></b>								
All ages .....	22.4	12.6	12.3	13.0	14.0	13.5	11.8	11.3
Children under 18 in families .....	26.9	15.0	16.8	17.9	20.1	20.5	16.3	15.7
With—								
Male householder <sup>d</sup> .....	22.4	9.3	9.8	10.4	11.7	10.7	9.0	8.9
Female householder .....	72.2	53.4	52.7	50.8	53.6	52.1	40.6	38.4
18–54 <sup>e</sup> .....	16.5	8.7	9.2	10.5	11.8	11.0	10.3	9.6
55–64 .....	21.5	11.4	10.2	9.5	10.5	9.7	9.5	9.4
65 or older .....	35.2	24.6	15.3	15.7	12.6	12.2	9.7	10.2
In families .....	26.9	14.7	8.0	8.5	6.4	5.9	4.9	5.1
Unrelated individuals .....	61.9	47.1	31.0	30.6	25.6	24.8	19.7	20.8
Men .....	59.0	38.9	27.7	24.4	20.5	17.3	16.4	18.3
Women .....	63.3	49.7	31.9	32.3	27.0	26.9	20.9	21.8

- 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.

SOURCES: U.S. Census Bureau, Current Population Survey, public use file of the March 2001 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.

CONTACT: Curt Pauzenga (410) 965-7210.



Table 3.E3—Shares of money income from earnings and other sources for aged and nonaged families, 2000

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) .....	10.7	8.4	2.2	11.6	11	0.6	34.7	28	6.7	60.8	55.2	5.6
<i>Percent receiving income of specified type<sup>b</sup></i>												
Earnings.....	13	16	3	45	46	22	84	94	40	95	97	69
Public program payments												
Social Security <sup>c</sup> .....	93	95	84	92	93	64	6	5	12	10	10	10
Supplemental Security Income.....	5	3	16	5	4	16	4	1	14	3	2	10
Other public assistance.....	2	3	2	4	3	8	10	9	12	12	10	25
Other programs <sup>d</sup> .....	4	4	2	8	8	7	5	6	4	9	9	7
Other sources												
Dividends, interest, rent .....	58	66	27	67	69	30	46	53	16	61	66	15
Employment-related pensions, alimony, annuities .....	39	47	9	51	53	9	6	6	3	15	15	15
<i>Percentage distribution of income, by type</i>												
Total percent.....	100	100	100	100	100	100	100	100	100	100	100	100
Earnings.....	14	15	1	34	34	12	88	89	46	90	91	68
Public program payments												
Social Security <sup>c</sup> .....	44	42	85	32	32	64	2	1	20	2	1	7
Supplemental Security Income.....	1	1	8	1	e	9	1	e	17	e	e	6
Other public assistance.....	e	e	e	e	e	3	2	2	7	1	1	10
Other programs <sup>d</sup> .....	1	1	1	1	1	2	1	1	3	1	1	2
Other sources												
Dividends, interest, rent .....	20	21	3	15	15	5	5	5	3	4	4	1
Employment-related pensions, alimony, annuities .....	19	20	3	17	18	4	2	2	3	3	2	5
Median income (dollars).....	13,767	16,716	5,747	32,858	34,641	8,440	24,185	29,318	3,791	55,145	56,310	8,790

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 1999. 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.

SOURCE: U.S. Census Bureau, Current Population Survey, Public use file of the March 2001 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.

CONTACT: Curt Pauzenga (410) 965-7210.

### 3.E Poverty

**Table 3.E4—Current living arrangements of persons aged 65 or older, March 2001**

Living arrangement and sex	Population (thousands)			Percentage distribution			Percent officially poor
	Total	Poor	Nonpoor	Total	Poor	Nonpoor	
All .....	32,979	3,360	29,619	100.0	100.0	100.0	10.2
Unrelated individuals.....	10,659	2,220	8,439	32.3	66.1	28.5	20.8
Family members .....	22,320	1,140	21,180	67.7	33.9	71.5	5.1
Householder or spouse .....	20,196	1,020	19,176	61.2	30.3	64.7	5.0
Other relative <sup>a</sup> .....	2,124	120	2,004	6.4	3.6	6.8	5.7
Poor by own income.....	854	102	751	2.6	3.0	2.5	12.0
Not poor by own income.....	1,271	18	1,253	3.9	0.5	4.2	1.4
Men .....	14,179	1,063	13,116	43.0	31.7	44.3	7.5
Unrelated individuals.....	2,882	528	2,354	8.7	15.7	7.9	18.3
Family members .....	11,298	536	10,762	34.3	15.9	36.3	4.7
Householder.....	7,974	354	7,620	24.2	10.5	25.7	4.4
Spouse of householder .....	2,692	151	2,542	8.2	4.5	8.6	5.6
Other relative <sup>a</sup> .....	632	31	600	1.9	0.9	2.0	5.0
Poor by own income.....	158	27	131	0.5	0.8	0.4	16.8
Not poor by own income.....	474	5	469	1.4	0.1	1.6	1.0
Women .....	18,799	2,296	16,503	57.0	68.3	55.7	12.2
Unrelated individuals.....	7,777	1,692	6,085	23.6	50.4	20.5	21.8
Family members .....	11,022	604	10,418	33.4	18.0	35.2	5.5
Householder, no husband present .....	1,727	175	1,552	5.2	5.2	5.2	10.1
Householder with husband present.....	2,039	104	1,935	6.2	3.1	6.5	5.1
Wife of householder .....	5,764	236	5,527	17.5	7.0	18.7	4.1
Other relative <sup>a</sup> .....	1,493	89	1,404	4.5	2.6	4.7	6.0
Poor by own income.....	696	76	620	2.1	2.3	2.1	10.9
Not poor by own income.....	797	13	783	2.4	0.4	2.6	1.7

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.

SOURCE: U.S. Census Bureau, Current Population Survey, Public use file of the March 2001 Income Supplement.

NOTES: Living arrangements as of March 2001.

Poverty status in 2000 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.

CONTACT: Curt Pauzenga (410) 965-7210.

Table 3.E6—Aged families receiving Social Security benefits, by share of income from benefits and race, 2000

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>							
Total number (thousands).....	10,653	8,435	2,218	...	11,822	11,134	688	...
Total percent.....	100	100	100	21	100	100	100	6
No Social Security benefits.....	7	5	16	46	8	7	36	25
Some Social Security benefits.....	93	95	84	19	92	93	64	4
Less than one-fourth of income.....	10	12	1	2	22	23	<sup>c</sup>	<sup>c</sup>
One-fourth up to one-half of income.....	19	23	2	2	26	27	4	1
One-half up to three-fourths of income.....	20	23	11	11	20	21	12	4
Three-fourths or more of income.....	44	37	70	33	24	23	48	11
	<b>White</b>							
Total number (thousands).....	9,452	7,711	1,742	...	10,299	9,840	459	...
Total percent.....	100	100	100	18	100	100	100	4
No Social Security benefits.....	7	5	15	44	8	6	40	23
Some Social Security benefits.....	93	95	85	17	92	94	60	3
Less than one-fourth of income.....	10	12	1	2	22	23	<sup>c</sup>	<sup>c</sup>
One-fourth up to one-half of income.....	19	23	2	2	26	28	4	1
One-half up to three-fourths of income.....	21	24	10	9	20	21	8	2
Three-fourths or more of income.....	43	36	71	31	24	23	48	9
	<b>Black</b>							
Total number (thousands).....	985	568	417	...	991	866	126	...
Total percent.....	100	100	100	42	100	100	100	13
No Social Security benefits.....	11	8	16	60	10	9	19	24
Some Social Security benefits.....	89	92	84	40	90	91	81	11
Less than one-fourth of income.....	6	11	<sup>c</sup>	<sup>c</sup>	24	28	<sup>c</sup>	<sup>c</sup>
One-fourth up to one-half of income.....	15	24	2	7	22	24	6	3
One-half up to three-fourths of income.....	15	17	12	33	20	19	23	15
Three-fourths or more of income.....	53	40	70	56	24	20	52	28

a. Payments under Social Security program any time in 2000 to any family member as reported in the March 2001 Current Population Survey.

b. Includes other races.

c. Less than 0.05 percent.

SOURCE: U.S. Census Bureau, Current Population Survey, Public use file of the March 2001 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.

CONTACT: Curt Pauzenga (410) 965-7210.

### 3.E Poverty

**Table 3.E8—Poverty guidelines for families of specified size, 1965–2002 (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
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

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

b. Add this amount for each additional family member. Before 1973, increments between some of the smaller family sizes differed from the increment shown in the table. Beginning in 1973, the increment has been the same for all family sizes in each year's set of guidelines.

SOURCE: Department of Health and Human Services, *Federal Register*, vol. 67, no. 31, February 14, 2002, pp. 6931–6933.

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

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.

CONTACT: Gordon Fisher (202) 690-5880.

Table 4.A1—Old-Age and Survivors Insurance, selected years 1937–2001 (in millions of dollars)

Year	Receipts					Expenditures				Assets	
	Total	Net contributions <sup>a</sup>	Income from taxation of benefits	Payments from the general fund of the Treasury <sup>b</sup>	Net interest <sup>c</sup>	Total	Benefit payments <sup>d</sup>	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of period
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	...	4	257	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
1961	11,833	11,285	...	...	548	12,432	11,862	239	332	-599	19,725
1962	12,585	12,059	...	...	526	13,973	13,356	256	361	-1,388	18,337
1963	15,063	14,541	...	...	521	14,920	14,217	281	423	143	18,480
1964	16,258	15,689	...	...	569	15,613	14,914	296	403	645	19,125
1965	16,610	16,017	...	...	593	17,501	16,737	328	436	-890	18,235
1966	21,302	20,580	...	78	644	18,967	18,267	256	444	2,335	20,570
1967	24,034	23,138	...	78	818	20,382	19,468	406	508	3,652	24,222
1968	25,040	23,719	...	382	939	23,557	22,643	476	438	1,483	25,704
1969	29,554	27,947	...	442	1,165	25,176	24,210	474	491	4,378	30,082
1970	32,220	30,256	...	449	1,515	29,848	28,798	471	579	2,371	32,454
1971	35,877	33,723	...	488	1,667	34,542	33,414	514	613	1,335	33,789
1972	40,050	37,781	...	475	1,794	38,522	37,124	674	724	1,528	35,318
1973	48,344	45,975	...	442	1,928	47,175	45,745	647	783	1,169	36,487
1974	54,688	52,081	...	447	2,159	53,397	51,623	865	909	1,291	37,777
1975	59,605	56,816	...	425	2,364	60,395	58,517	896	982	-790	36,987
1976	66,276	63,362	...	614	2,301	67,876	65,705	959	1,212	-1,600	35,388
1977	72,412	69,572	...	613	2,227	75,309	73,121	981	1,208	-2,897	32,491
1978	78,094	75,471	...	615	2,008	83,064	80,361	1,115	1,589	-4,971	27,520
1979	90,274	87,919	...	557	1,797	93,133	90,573	1,113	1,448	-2,860	24,660
1980	105,841	103,456	...	540	1,845	107,678	105,083	1,154	1,442	-1,837	22,823
1981	125,361	122,627	...	675	2,060	126,695	123,803	1,307	1,585	-1,334	21,490
1982	125,198	123,673	...	680	845	142,119	138,806	1,519	1,793	<sup>e</sup> 598	22,088
1983	150,584	138,337	...	5,541	6,706	152,999	149,221	1,528	2,251	-2,416	19,672
1984	169,328	164,122	2,835	105	2,266	161,883	157,841	1,638	2,404	7,445	27,117
1985	184,239	176,958	3,208	2,203	1,871	171,150	167,248	1,592	2,310	<sup>e</sup> 8,725	35,842
1986	197,393	190,741	3,424	160	3,069	181,000	176,813	1,601	2,585	<sup>e</sup> 3,239	39,081
1987	210,736	202,735	3,257	55	4,690	187,668	183,587	1,524	2,557	23,068	62,149
1988	240,770	229,775	3,384	43	7,568	200,020	195,454	1,776	2,790	40,750	102,899
1989	264,653	250,195	2,439	34	11,985	212,489	207,971	1,673	2,845	52,164	155,063
1990	286,653	267,530	4,848	-2,089	16,363	227,519	222,987	1,563	2,969	59,134	214,197
1991	299,286	272,574	5,864	19	20,829	245,634	240,467	1,792	3,375	53,652	267,849
1992	311,162	280,992	5,852	14	24,303	259,861	254,883	1,830	3,148	51,301	319,150
1993	323,277	290,905	5,335	10	27,027	273,104	267,755	1,996	3,353	50,173	369,322
1994	328,271	293,323	4,995	7	29,946	284,133	279,068	1,645	3,420	44,138	413,460
1995	342,801	304,620	5,490	-129	32,820	297,760	291,630	2,077	4,052	45,041	458,502
1996	363,741	321,557	6,471	7	35,706	308,217	302,861	1,802	3,554	55,524	514,026
1997	397,169	349,946	7,426	2	39,795	322,073	316,257	2,128	3,688	75,096	589,121
1998	424,848	371,207	9,149	1	44,491	332,324	326,762	1,899	3,662	92,524	681,645
1999	457,040	396,352	10,899	f	49,788	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

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. 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.

c. 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. For the OASI trust fund, the amount shown for 1985 includes an interest adjustment of \$88 million on unnegotiated checks issued before April 1985. For the OASI and DI trust funds, combined, the amount shown for 1985 includes an interest adjustment of \$102.8 million on unnegotiated checks issued before April 1985.

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. Less than \$500,000.

SOURCE: Department of the Treasury, 100 percent data.

NOTE: ... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

## 4.A OASDI: Trust Funds

**Table 4.A2—Disability Insurance, 1957–2001 (in millions of dollars)**

Year	Receipts					Expenditures				Assets	
	Total	Net contributions <sup>a</sup>	Income from taxation of benefits	Payments from the general fund of the Treasury <sup>b</sup>	Net interest <sup>c</sup>	Total	Benefit payments <sup>d</sup>	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of period
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	...	16	58	1,947	1,784	137	25	133	1,739
1967	2,379	2,286	...	16	78	2,089	1,950	109	31	290	2,029
1968	3,454	3,316	...	32	106	2,458	2,311	127	20	996	3,025
1969	3,792	3,599	...	16	177	2,716	2,557	138	21	1,075	4,100
1970	4,774	4,481	...	16	277	3,259	3,085	164	10	1,514	5,614
1971	5,031	4,620	...	50	361	4,000	3,783	205	13	1,031	6,645
1972	5,572	5,107	...	51	414	4,759	4,502	233	24	813	7,457
1973	6,443	5,932	...	52	458	5,973	5,764	190	20	470	7,927
1974	7,378	6,826	...	52	500	7,196	6,957	217	22	182	8,109
1975	8,035	7,444	...	90	502	8,790	8,505	256	29	-754	7,354
1976	8,757	8,233	...	103	422	10,366	10,055	285	26	-1,609	5,745
1977	9,570	9,138	...	128	304	11,945	11,547	399	e	-2,375	3,370
1978	13,810	13,413	...	142	256	12,954	12,599	325	30	856	4,226
1979	15,590	15,114	...	118	358	14,186	13,786	371	30	1,404	5,630
1980	13,871	13,255	...	130	485	15,872	15,515	368	-12	-2,001	3,629
1981	17,078	16,738	...	168	172	17,658	17,192	436	29	-580	3,049
1982	22,715	21,995	...	174	546	17,992	17,376	590	26	f -358	2,691
1983	20,682	17,991	...	1,121	1,569	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	1,017	870	19,478	18,827	608	43	f 2,363	6,321
1986	19,439	18,399	238	...	803	20,522	19,853	600	68	f 1,459	7,780
1987	20,303	19,691	g -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	-775	883	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
1995	56,696	54,401	341	-203	2,158	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	-836	6,942	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

- 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. 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.
- c. 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.
- 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. Less than \$500,000.
- f. Amount equals total receipts less total expenditures, less amounts loaned or plus amounts repaid under interfund borrowing provisions.
- g. 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.

SOURCE: Department of the Treasury, 100 percent data.

NOTE: ... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

Table 4.A3—Combined OASI and DI, 1957–2001 (in millions of dollars)

Year	Receipts					Expenditures				Assets	
	Total	Net contributions <sup>a</sup>	Income from taxation of benefits	Payments from the general fund of the Treasury <sup>b</sup>	Net interest <sup>c</sup>	Total	Benefit payments <sup>d</sup>	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of period
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	...	94	702	20,913	20,051	393	469	2,467	22,308
1967	26,413	25,424	...	94	896	22,471	21,417	515	539	3,942	26,250
1968	28,493	27,034	...	414	1,045	26,015	24,954	603	458	2,479	28,729
1969	33,346	31,546	...	458	1,342	27,892	26,767	612	513	5,453	34,182
1970	36,993	34,737	...	465	1,791	33,108	31,884	635	589	3,886	38,068
1971	40,908	38,343	...	538	2,027	38,542	37,197	719	626	2,366	40,434
1972	45,622	42,888	...	526	2,208	43,281	41,625	907	749	2,341	42,775
1973	54,787	51,907	...	494	2,386	53,148	51,508	837	802	1,639	44,414
1974	62,066	58,907	...	499	2,660	60,593	58,581	1,082	931	1,472	45,886
1975	67,640	64,259	...	515	2,866	69,184	67,022	1,152	1,010	-1,544	44,342
1976	75,034	71,595	...	717	2,722	78,242	75,759	1,244	1,239	-3,209	41,133
1977	81,982	78,710	...	741	2,531	87,254	84,667	1,379	1,208	-5,272	35,861
1978	91,903	88,883	...	757	2,264	96,018	92,960	1,440	1,618	-4,115	31,746
1979	105,864	103,034	...	675	2,155	107,320	104,359	1,483	1,477	-1,456	30,291
1980	119,712	116,711	...	670	2,330	123,550	120,598	1,522	1,430	-3,838	26,453
1981	142,438	139,364	...	843	2,231	144,352	140,995	1,743	1,614	-1,914	24,539
1982	147,913	145,667	...	854	1,391	160,111	156,182	2,109	1,820	<sup>e</sup> 239	24,778
1983	171,266	156,328	...	6,662	8,276	171,177	166,745	2,153	2,279	89	24,867
1984	186,637	180,067	3,025	105	3,440	180,429	175,739	2,264	2,426	6,208	31,075
1985	203,540	194,149	3,430	3,220	2,741	190,628	186,075	2,200	2,353	<sup>e</sup> 11,088	42,163
1986	216,833	209,140	3,662	160	3,871	201,522	196,667	2,202	2,653	<sup>e</sup> 4,698	46,861
1987	231,039	222,425	3,221	55	5,338	209,093	204,106	2,373	2,614	21,946	68,807
1988	263,469	251,814	3,445	43	8,168	222,514	217,149	2,513	2,851	40,955	109,762
1989	289,448	274,189	2,534	34	12,692	236,242	230,882	2,427	2,934	53,206	162,968
1990	315,443	296,070	4,992	-2,864	17,245	253,135	247,816	2,270	3,049	62,309	225,277
1991	329,676	301,711	6,054	19	21,892	274,205	268,162	2,587	3,457	55,471	280,747
1992	342,591	311,128	6,084	14	25,365	291,865	285,995	2,664	3,206	50,726	331,473
1993	355,578	322,090	5,616	10	27,862	308,766	302,368	2,963	3,435	46,812	378,285
1994	381,111	344,695	5,306	7	31,103	323,011	316,812	2,674	3,526	58,100	436,385
1995	399,497	359,021	5,831	-332	34,977	339,815	332,554	3,141	4,120	59,683	496,068
1996	424,451	378,881	6,844	7	38,718	353,569	347,050	2,962	3,556	70,883	566,950
1997	457,668	405,984	7,896	2	43,787	369,108	361,952	3,409	3,747	88,560	655,510
1998	489,204	430,174	9,707	1	49,323	382,255	374,969	3,467	3,819	106,950	762,460
1999	526,582	459,556	11,559	f	55,466	392,908	385,765	3,328	3,816	133,673	896,133
2000	568,433	492,484	12,314	-836	64,471	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

- 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. 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.
- c. 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. For the OASI trust fund, the amount shown for 1985 includes an interest adjustment of \$88 million on unnegotiated checks issued before April 1985. For the OASI and DI trust funds, combined, the amount shown for 1985 includes an interest adjustment of \$102.8 million on unnegotiated checks issued before April 1985.
- 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. Less than \$500,000.

SOURCE: Department of the Treasury, 100 percent data.

NOTE: ... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

## 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 1937–2001 (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 percent 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	...	...	...	...	...	74,300	e
1938	10	10	...	...	...	...	...	68,600	e
1939	14	14	...	...	...	...	...	73,100	e
1940	35	35	...	...	...	...	...	78,600	e
1945	274	274	...	...	...	...	...	171,900	0.2
1950	961	961	...	...	...	...	...	229,900	0.4
1955	4,968	4,968	...	...	...	...	...	316,800	1.6
1956	5,715	5,715	...	...	...	...	...	340,000	1.7
1957	7,404	7,347	57	...	...	...	...	359,300	2.1
1958	8,576	8,327	249	...	...	...	...	370,000	2.3
1959	10,298	9,842	457	...	...	...	...	394,000	2.6
1960	11,245	10,677	568	...	...	...	...	412,700	2.7
1961	12,749	11,862	887	...	...	...	...	430,300	3.0
1962	14,461	13,356	1,105	...	...	...	...	457,900	3.2
1963	15,427	14,217	1,210	...	...	...	...	481,000	3.2
1964	16,223	14,914	1,309	...	...	...	...	515,800	3.1
1965	18,311	16,737	1,573	...	...	...	...	557,400	3.3
1966	21,070	18,267	1,781	891	128	f	3	606,400	3.5
1967	25,967	19,468	1,939	3,353	1,197	f	11	650,400	4.0
1968	30,651	22,642	2,294	4,179	1,518	1	16	714,500	4.3
1969	33,371	24,209	2,542	4,739	1,865	1	15	780,800	4.3
1970	38,982	28,796	3,067	5,124	1,975	2	18	841,100	4.6
1971	45,065	33,413	3,758	5,751	2,117	2	24	905,100	5.0
1972	50,269	37,122	4,473	6,318	2,325	2	29	994,300	5.1
1973	61,091	45,741	5,718	7,057	2,526	3	46	1,113,400	5.5
1974	70,996	51,618	6,903	9,099	3,318	5	54	1,225,600	5.8
1975	82,611	58,509	8,414	11,315	4,273	9	91	1,331,700	6.2
1976	94,180	65,699	9,966	13,340	5,080	6	89	1,475,400	6.4
1977	106,443	73,113	11,463	15,737	6,038	8	84	1,637,100	6.5
1978	117,894	80,352	12,513	17,682	7,252	9	86	1,848,300	6.4
1979	133,691	90,556	13,708	20,623	8,708	18	78	2,081,500	6.4
1980	156,298	105,074	15,437	25,064	10,635	8	78	2,323,900	6.7
1981	184,450	123,795	17,199	30,342	13,113	8	-8	2,599,400	7.1
1982	207,268	138,800	17,338	35,631	15,455	6	38	2,768,400	7.5
1983	224,524	149,502	17,530	39,337	18,106	6	42	2,946,900	7.6
1984	238,682	157,862	17,900	43,257	19,661	f	1	3,274,800	7.3
1985	256,723	167,360	18,836	47,580	22,947	f	f	3,515,000	7.3
1986	272,698	176,845	19,847	49,758	26,239	...	9	3,712,400	7.3
1987	284,487	183,644	20,512	49,496	30,820	...	16	3,962,500	7.2
1988	303,717	195,522	21,692	52,517	33,970	...	16	4,272,100	7.1
1989	329,193	207,977	22,873	60,011	38,294	...	38	4,599,800	7.2
1990	356,536	222,993	24,803	66,239	42,468	...	32	4,903,200	7.3
1991	386,912	240,436	27,662	71,549	47,229	...	36	5,085,400	7.6
1992	419,325	254,939	31,091	83,895	49,367	...	33	5,390,400	7.8
1993	449,896	267,804	34,598	93,487	53,979	...	28	5,610,000	8.0
1994	478,775	279,118	37,717	103,282	58,618	...	40	5,888,000	8.1
1995	513,959	291,682	40,898	116,368	64,972	...	39	6,200,900	8.3
1996	544,350	302,914	44,174	128,632	68,598	...	31	6,547,400	8.3
1997	572,542	316,311	45,659	137,762	72,757	...	53	6,937,000	8.3
1998	585,156	326,817	48,173	133,990	76,125	...	51	7,426,000	7.9
1999	595,326	334,437	51,331	128,766	80,724	...	68	7,777,300	7.7
2000	625,060	352,706	54,938	128,458	88,893	...	63	8,319,200	7.5
2001	672,853	372,370	59,577	141,183	99,663	...	60	8,723,500	7.7

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. Less than \$500,000.

SOURCES: Department of the Treasury and Bureau of Economic Analysis, 100 percent data.

NOTE: ... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.



**Table 4.A5—Total annual benefits paid from OASI trust fund, by type of benefit, selected years 1937–2001**  
(in millions of dollars)

Year	Benefits paid to—									Lump-sum death payments
	Total	Retired workers and dependents			Survivors				Special age-72 beneficiaries	
		Retired workers	Wives and husbands	Children	Children	Widowed mothers and fathers	Widow(er)s	Parents		
1937	1	...	...	...	...	...	...	...	...	1
1938	10	...	...	...	...	...	...	...	...	10
1939	14	...	...	...	...	...	...	...	...	14
1940	35	15	2	a	3	2	a	a	...	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
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	a	218
1999	334,437	238,478	18,415	1,992	12,125	1,415	61,769	27	a	216
2000	352,706	253,542	18,969	2,133	12,532	1,406	63,884	26	a	214
2001	372,370	268,976	19,491	2,332	13,134	1,441	66,758	26	a	212

a. Less than \$500,000.

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

NOTES: Unnegotiated checks not deducted.

... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

## 4.A OASDI: Trust Funds

**Table 4.A6—Total annual benefits paid from DI trust fund, by type of benefit, 1957–2001 (in millions of dollars)**

Year	Total	Benefits paid to—		
		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

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

NOTES: Unnegotiated checks not deducted.

... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

Table 4.B1—Workers, earnings, and Social Security numbers issued, selected years 1937–2001

Year	Number of workers reported with taxable earnings <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
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 <sup>e</sup>	146,100	9,022	4,700	3,860,200	3,285,300	85.1	26,422	22,487	5,413
1998 <sup>e</sup>	148,900	9,371	4,893	4,167,200	3,521,500	84.5	27,987	23,650	5,288
1999 <sup>e</sup>	151,400	9,099	4,898	4,451,100	3,744,600	84.1	29,400	24,733	5,306
2000 <sup>f</sup>	153,700	<sup>g</sup>	<sup>g</sup>	4,794,500	3,991,100	83.2	31,194	25,967	5,476
2001 <sup>h</sup>	153,500	<sup>g</sup>	<sup>g</sup>	5,056,100	4,198,300	83.0	32,939	27,350	5,883

a. Relates to wage and salary workers for 1937–1950. Beginning in 1951, includes self-employment. See Table 2.A3 for annual maximum taxable earnings.

b. Excludes railroad account numbers. Since program began, 408 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. During 1937–1999, 300 million different persons reported with taxable earnings.

d. Total wages, including estimated amounts above taxable limit, for 1937–1950. 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.

g. Data not available.

h. Preliminary estimates based on data from Bureau of Labor Statistics and the Bureau of Economic Analysis.

SOURCES: Social Security Administration, Master Earnings File, 1 percent sample; Bureau of Labor Statistics; and Bureau of Economic Analysis.

CONTACT: Greg Diez (410) 965-0153 or William Keams (410) 965-6750.

## 4.B OASDI: Covered Workers

**Table 4.B2—Number and amount of earnings for wage and salary and self-employed workers, 1951–2001**

Year	Number of workers reported with taxable earnings <sup>a</sup> (thousands)		Wage and salary earnings					Self-employment earnings				
			Total in covered employment <sup>b</sup> (millions of dollars)	Reported taxable		Average per worker		Total in covered employment <sup>c</sup> (millions)	Reported taxable		Average per self-employed person (dollars)	
	Wage and salary employment	Self-employment		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
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 <sup>e</sup>	137,700	14,100	3,588,000	3,104,500	86.5	26,057	22,545	272,200	180,800	66.4	19,305	12,823
1998 <sup>e</sup>	140,400	14,300	3,876,400	3,330,100	85.9	27,610	23,719	290,800	191,400	65.8	20,336	13,385
1999 <sup>e</sup>	142,700	14,600	4,143,900	3,542,800	85.5	29,039	24,827	307,200	201,800	65.7	21,041	13,822
2000 <sup>f</sup>	144,900	14,700	4,474,200	3,780,400	84.5	30,878	26,090	320,300	210,700	65.8	21,789	14,333
2001 <sup>g</sup>	144,800	14,700	4,722,700	3,978,700	84.2	32,615	27,477	333,400	219,600	65.9	22,680	14,939

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. Preliminary estimates.

g. Preliminary estimates.

SOURCES: Social Security Administration, Master Earnings File, 1 percent sample; Bureau of Labor Statistics; and Bureau of Economic Analysis.

NOTE: See Table 4.B1 for wage and salary data before 1951.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

Table 4.B3—Number of workers and median annual earnings, by type of worker and sex, selected years 1937–1999

Year	All workers			All wage and salary workers			All self-employed workers <sup>a</sup>		
	Total	Men	Women	Total	Men	Women	Total	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
1981	113,000	63,984	49,016	107,300	59,562	47,738	8,250	6,361	1,889
1982	111,800	63,089	48,711	105,800	58,557	47,243	8,550	6,443	2,107
1983	112,100	62,881	49,219	105,900	58,248	47,652	9,200	6,823	2,377
1984	116,300	64,700	51,600	109,900	60,009	49,891	9,900	7,196	2,704
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 <sup>b</sup>	146,100	77,463	68,636	137,700	71,864	65,837	14,100	9,130	4,970
1998 <sup>b</sup>	148,900	78,690	70,210	140,400	73,097	67,303	14,300	9,143	5,156
1999 <sup>b</sup>	151,400	79,879	71,521	142,700	74,237	68,463	14,600	9,244	5,356
<i>Median earnings<sup>c</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
1981	9,361	12,941	6,690	9,476	13,255	6,807	8,655	10,512	4,330
1982	9,924	13,318	7,232	10,109	13,726	7,390	8,175	10,139	4,333
1983	10,322	13,687	7,618	10,527	14,130	7,809	8,669	10,686	4,722
1984	10,757	14,360	7,878	11,094	15,062	8,088	9,302	11,684	5,113
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 <sup>b</sup>	17,555	21,810	14,038	18,120	22,688	14,476	12,911	15,914	8,939
1998 <sup>b</sup>	18,516	23,045	14,834	19,096	23,920	15,283	13,494	16,652	9,360
1999 <sup>b</sup>	19,195	23,849	15,419	19,784	24,719	15,876	13,881	17,237	9,696

a. Not covered before 1951.

b. Preliminary data.

c. 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.

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

NOTE: ... = not applicable.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

## 4.B OASDI: Covered Workers

**Table 4.B4—Percentage of all workers and self-employed workers with total annual earnings below annual maximum taxable, by sex, selected years 1937–1999**

Year	Annual maximum taxable earnings (dollars)	All workers <sup>a</sup> (percent)			All self-employed workers (percent)		
		Total	Men	Women	Total	Men	Women
1937	3,000	96.9	95.8	99.7	...	...	...
1940	3,000	96.6	95.4	99.7	...	...	...
1945	3,000	86.3	78.6	98.9	...	...	...
1950	3,000	71.1	59.9	94.6	...	...	...
1951	3,600	75.5	64.6	96.7	65.4	62.6	83.3
1952	3,600	72.1	60.0	95.4	64.1	61.2	83.5
1953	3,600	68.8	55.5	93.8	62.9	59.5	83.1
1954	3,600	68.4	55.4	93.0	62.6	58.8	82.8
1955	4,200	74.4	63.4	95.9	74.0	72.3	86.3
1956	4,200	71.6	59.7	94.5	71.2	69.1	86.0
1957	4,200	70.1	58.7	93.1	69.6	67.2	85.5
1958	4,200	69.4	58.4	91.8	68.8	66.3	85.7
1959	4,800	73.3	62.7	94.3	72.0	69.6	88.0
1960	4,800	72.0	60.9	93.5	71.6	69.2	87.7
1961	4,800	70.8	59.6	92.4	70.3	67.8	86.9
1962	4,800	68.8	57.1	91.1	67.9	65.3	85.3
1963	4,800	67.5	55.5	90.0	66.3	63.4	85.3
1964	4,800	65.5	53.1	88.5	63.8	60.5	84.4
1965	4,800	63.9	51.0	87.3	59.5	55.8	82.5
1966	6,600	75.8	64.4	95.6	68.3	65.0	88.4
1967	6,600	73.6	61.5	94.2	66.7	63.2	87.5
1968	7,800	78.6	68.0	96.3	70.3	67.2	89.7
1969	7,800	75.5	62.8	96.0	68.3	65.0	89.1
1970	7,800	74.0	61.8	93.5	67.8	64.3	88.3
1971	7,800	71.7	59.1	91.7	66.7	63.3	86.2
1972	9,000	75.0	62.9	93.9	68.8	65.0	89.7
1973	10,800	79.7	68.9	96.2	71.1	67.4	91.0
1974	13,200	84.9	76.2	97.8	75.7	72.1	94.0
1975	14,100	84.9	76.4	97.5	77.8	74.4	93.9
1976	15,300	85.1	76.3	97.5	78.6	75.1	94.3
1977	16,500	85.2	76.3	97.5	79.3	75.8	94.1
1978	17,700	84.6	75.4	97.1	79.3	75.6	94.0
1979	22,900	90.0	83.6	98.6	84.3	81.3	95.9
1980	25,900	91.2	85.5	98.8	86.9	84.2	96.6
1981	29,700	92.4	87.4	99.0	89.4	87.1	97.2
1982	32,400	92.9	88.3	98.9	91.0	88.8	97.7
1983	35,700	93.7	89.6	99.0	92.0	90.0	97.7
1984	37,800	93.6	89.4	98.9	91.8	89.7	97.6
1985	39,600	93.5	89.3	98.8	92.0	89.8	97.5
1986	42,000	93.8	89.7	98.7	92.3	90.2	97.5
1987	43,800	93.9	89.9	98.6	92.5	90.4	97.5
1988	45,000	93.5	89.4	98.3	91.7	89.4	97.1
1989	48,000	93.8	90.1	98.3	92.4	90.1	97.3
1990	51,300	94.3	90.9	98.4	93.3	91.3	97.7
1991	53,400	94.4	91.1	98.3	93.6	91.6	97.7
1992	55,500	94.3	91.0	98.1	93.6	91.7	97.6
1993	57,600	94.4	91.3	98.1	93.7	91.9	97.4
1994	60,600	94.6	91.4	98.1	93.9	92.0	97.5
1995	61,200	94.2	91.0	97.9	93.9	92.0	97.5
1996	62,700	93.9	90.6	97.7	93.9	92.0	97.4
1997 <sup>b</sup>	65,400	93.8	90.5	97.6	93.8	91.9	97.3
1998 <sup>b</sup>	68,400	93.7	90.3	97.5	93.8	92.0	97.2
1999 <sup>b</sup>	72,600	94.0	90.8	97.6	94.1	92.3	97.3

a. For 1937–1950, relates to wage and salary workers. Beginning in 1951, includes self-employed workers.

b. Preliminary data.

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

NOTE: ... = not applicable.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

Table 4.B5—Number of all workers, by age and sex, selected years 1937–1999 (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
<b>Total</b>															
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 <sup>b</sup>	146,100	11,399	15,478	17,147	18,025	19,267	17,956	15,369	12,020	8,447	2,568	2,907	2,914	731	1,870
1998 <sup>b</sup>	148,900	11,920	15,731	17,018	17,702	19,373	18,401	15,779	12,676	8,936	2,688	3,002	2,975	754	1,946
1999 <sup>b</sup>	151,400	12,125	16,073	16,664	17,438	19,307	18,743	16,342	13,437	9,377	2,757	3,134	3,066	804	2,130
<b>Men</b>															
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	4,891	4,729	4,023	1,418	1,595	1,352	285	643
1980	64,288	6,620	9,971	9,278	8,206	6,372	5,178	4,590	4,516	4,152	1,391	1,597	1,411	309	697
1985	66,114	5,547	9,432	9,870	9,066	7,920	6,050	4,838	4,186	3,932	1,408	1,593	1,297	289	686
1990	72,292	5,690	8,835	10,131	10,251	9,216	7,977	5,976	4,651	3,857	1,381	1,619	1,526	358	823
1995	75,443	5,590	8,069	9,097	10,146	10,106	8,966	7,663	5,620	4,193	1,374	1,547	1,614	405	1,053
1996	76,241	5,672	7,876	9,074	9,935	10,198	9,240	7,873	5,963	4,307	1,416	1,569	1,629	403	1,086
1997 <sup>b</sup>	77,463	5,820	7,938	9,011	9,693	10,274	9,494	7,995	6,373	4,575	1,421	1,644	1,650	433	1,142
1998 <sup>b</sup>	78,690	6,071	8,035	8,895	9,472	10,343	9,683	8,202	6,675	4,827	1,474	1,695	1,690	444	1,183
1999 <sup>b</sup>	79,999	6,147	8,201	8,702	9,316	10,325	9,876	8,505	7,066	5,060	1,521	1,763	1,752	473	1,291
<b>Women</b>															
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 <sup>b</sup>	68,636	5,579	7,540	8,136	8,332	8,994	8,463	7,374	5,647	3,872	1,147	1,263	1,264	299	727
1998 <sup>b</sup>	70,210	5,849	7,696	8,123	8,230	9,029	8,718	7,577	6,000	4,109	1,214	1,307	1,285	309	763
1999 <sup>b</sup>	71,397	5,978	7,871	7,962	8,122	8,982	8,867	7,837	6,371	4,317	1,236	1,371	1,314	332	838

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.

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

NOTES: Age refers to age attained during year.

... = not applicable.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

## 4.B OASDI: Covered Workers

**Table 4.B6—Median earnings of all workers, by age and sex, selected years 1937–1999 (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
<b>Total</b>															
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 <sup>b</sup>	17,555	2,307	9,055	17,588	21,257	23,272	24,979	26,264	26,415	23,406	20,493	14,318	8,050	6,387	5,038
1998 <sup>b</sup>	18,516	2,513	9,740	18,665	22,465	24,352	25,989	27,409	27,620	24,731	21,365	15,291	8,438	6,755	5,320
1999 <sup>b</sup>	19,195	2,582	9,995	19,465	23,397	25,126	26,742	28,289	28,641	25,561	22,094	15,864	8,915	6,795	5,463
<b>Men</b>															
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 <sup>b</sup>	21,810	2,375	10,339	19,738	25,228	28,867	31,789	33,740	34,908	31,047	26,234	18,216	8,821	7,108	5,302
1998 <sup>b</sup>	23,045	2,599	11,114	21,050	26,658	30,172	33,030	34,864	36,155	32,667	27,596	19,812	9,307	7,438	5,653
1999 <sup>b</sup>	23,849	2,692	11,424	22,075	27,705	31,080	33,899	35,704	36,960	33,434	28,321	20,097	9,834	7,304	5,825
<b>Women</b>															
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 <sup>b</sup>	14,038	2,240	7,855	15,232	17,153	17,796	19,276	20,321	19,991	17,748	15,754	11,022	7,326	5,638	4,701
1998 <sup>b</sup>	14,834	2,432	8,501	16,123	18,144	18,628	20,049	21,497	21,087	18,678	16,627	11,713	7,619	5,973	4,898
1999 <sup>b</sup>	15,419	2,491	8,793	16,853	18,881	19,249	20,652	22,242	22,107	19,589	17,139	12,323	8,013	6,288	5,110

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.

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.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.



Table 4.B7—Number of wage and salary workers, by amount of taxable earnings and sex, 1992–1999

Year	All workers	Workers with earnings below the taxable maximum by dollar amount of earnings (numbers in thousands)											Workers with maximum earnings
		1–999	1,000–4,999	5,000–9,999	10,000–14,999	15,000–19,999	20,000–24,999	25,000–29,999	30,000–39,999	40,000–49,999	50,000–59,999	60,000–72,599	
<b>Total</b>													
1992	126,000	9,357	19,519	17,496	15,765	14,047	11,641	9,058	12,554	7,084	2,422	...	7,057
1993	128,100	9,655	19,395	17,521	15,808	14,092	11,807	9,327	12,786	7,371	3,325	...	7,013
1994	130,100	9,591	19,403	17,273	15,709	14,194	11,930	9,552	13,230	7,709	4,310	277	6,921
1995	132,800	9,213	19,355	17,213	15,766	14,376	12,230	9,867	13,853	8,171	4,662	498	7,597
1996	135,100	9,161	19,195	16,977	15,579	14,253	12,448	10,164	14,435	8,706	5,052	1,053	8,077
1997 <sup>a</sup>	137,700	8,767	18,832	16,837	15,425	14,203	12,593	10,456	15,232	9,327	5,521	2,105	8,403
1998 <sup>a</sup>	140,400	8,459	18,456	16,424	15,199	14,102	12,749	10,814	16,096	10,063	6,013	3,271	8,754
1999 <sup>a</sup>	142,700	8,470	18,427	16,278	14,766	13,976	12,717	10,997	16,694	10,523	6,449	4,826	8,575
<b>Men</b>													
1992	66,543	4,171	8,743	7,726	7,186	6,587	6,006	5,122	8,069	5,109	1,868	...	5,955
1993	67,673	4,429	8,665	7,740	7,223	6,652	6,048	5,222	8,074	5,224	2,527	...	5,869
1994	68,481	4,350	8,548	7,546	7,118	6,718	6,068	5,292	8,211	5,372	3,243	222	5,794
1995	69,901	4,256	8,510	7,457	7,051	6,814	6,238	5,415	8,448	5,587	3,444	388	6,292
1996	70,670	4,177	8,333	7,261	6,854	6,637	6,279	5,512	8,667	5,838	3,672	800	6,641
1997 <sup>a</sup>	71,864	4,052	8,172	7,145	6,706	6,465	6,260	5,586	8,948	6,159	3,931	1,580	6,859
1998 <sup>a</sup>	73,097	3,911	7,994	6,933	6,514	6,318	6,219	5,706	9,293	6,521	4,202	2,407	7,078
1999 <sup>a</sup>	74,237	3,945	8,014	6,927	6,272	6,205	6,089	5,730	9,493	6,677	4,439	3,528	6,919
<b>Women</b>													
1992	59,457	5,186	10,776	9,770	8,579	7,460	5,635	3,936	4,485	1,975	554	...	1,103
1993	60,427	5,226	10,730	9,781	8,586	7,440	5,759	4,105	4,712	2,147	798	...	1,144
1994	61,619	5,241	10,856	9,726	8,592	7,476	5,862	4,260	5,020	2,337	1,067	55	1,127
1995	62,900	4,957	10,845	9,756	8,714	7,563	5,992	4,452	5,405	2,584	1,217	110	1,305
1996	64,429	4,985	10,862	9,716	8,725	7,616	6,168	4,651	5,768	2,868	1,380	253	1,437
1997 <sup>a</sup>	65,837	4,715	10,660	9,692	8,719	7,737	6,333	4,870	6,284	3,168	1,590	525	1,544
1998 <sup>a</sup>	67,303	4,548	10,462	9,492	8,685	7,783	6,530	5,107	6,803	3,542	1,811	864	1,675
1999 <sup>a</sup>	68,463	4,526	10,413	9,352	8,494	7,772	6,628	5,267	7,201	3,846	2,010	1,298	1,656

a. Preliminary data.

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

NOTE: ... = not applicable.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

## 4.B OASDI: Covered Workers

**Table 4.B8—Number of self-employed workers, by age and sex, selected years 1951–1999 (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
<b>Total</b>															
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 <sup>a</sup> .....	14,100	152	500	1,033	1,556	1,986	2,063	1,885	1,565	1,210	404	490	597	170	488
1998 <sup>a</sup> .....	14,300	162	506	1,036	1,523	1,961	2,098	1,899	1,632	1,275	420	503	600	181	503
1999 <sup>a</sup> .....	14,600	173	522	1,017	1,494	1,948	2,082	1,982	1,711	1,355	436	535	625	182	539
<b>Men</b>															
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 <sup>a</sup> .....	9,130	98	312	639	981	1,249	1,320	1,205	1,004	793	276	338	424	123	369
1998 <sup>a</sup> .....	9,143	97	310	632	944	1,213	1,327	1,197	1,042	827	279	345	422	132	376
1999 <sup>a</sup> .....	9,244	108	309	607	914	1,189	1,304	1,247	1,077	861	289	365	436	133	403
<b>Women</b>															
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 <sup>a</sup> .....	4,970	54	188	395	575	737	743	680	561	417	128	152	173	47	120
1998 <sup>a</sup> .....	5,156	65	196	404	579	748	771	702	590	449	141	158	178	49	127
1999 <sup>a</sup> .....	5,356	65	213	409	579	759	778	735	634	494	146	171	189	49	136

a. Preliminary data.

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

NOTE: Age refers to age attained during year.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

Table 4.B9—Number of self-employed workers, by amount of taxable earnings and sex, 1992–1999

Year	All workers	Workers with earnings below the taxable maximum by dollar amount of earnings (numbers in thousands)											Workers with maximum earnings
		1–999	1,000–4,999	5,000–9,999	10,000–14,999	15,000–19,999	20,000–24,999	25,000–29,999	30,000–39,999	40,000–49,999	50,000–59,999	60,000–72,599	
<b>Total</b>													
1992	13,100	593	2,927	2,519	1,599	1,156	882	694	971	612	308	...	839
1993	13,200	587	2,866	2,562	1,627	1,149	881	689	990	633	388	...	828
1994	13,300	551	2,825	2,510	1,670	1,162	872	714	1,019	645	426	92	814
1995	13,500	535	2,781	2,593	1,690	1,192	892	712	1,044	678	444	116	822
1996	13,900	521	2,791	2,667	1,754	1,210	918	732	1,092	713	471	176	853
1997 <sup>a</sup>	14,100	524	2,736	2,685	1,748	1,232	932	745	1,106	741	493	281	877
1998 <sup>a</sup>	14,300	514	2,663	2,675	1,765	1,240	953	766	1,160	782	509	391	880
1999 <sup>a</sup>	14,600	508	2,638	2,705	1,796	1,258	964	773	1,194	813	539	557	857
<b>Men</b>													
1992	8,798	288	1,603	1,606	1,109	827	633	512	746	485	253	...	734
1993	8,840	291	1,559	1,632	1,118	809	640	501	760	500	316	...	715
1994	8,839	268	1,511	1,552	1,138	820	626	527	772	503	340	77	705
1995	8,908	256	1,492	1,581	1,138	826	638	514	782	521	356	96	708
1996	9,074	247	1,468	1,598	1,166	831	649	527	807	545	367	141	729
1997 <sup>a</sup>	9,130	255	1,440	1,557	1,144	845	650	526	801	562	384	226	741
1998 <sup>a</sup>	9,143	248	1,383	1,520	1,123	823	650	537	831	588	392	314	736
1999 <sup>a</sup>	9,244	243	1,362	1,505	1,117	826	652	532	849	595	411	436	714
<b>Women</b>													
1992	4,302	305	1,323	913	490	329	249	182	225	127	55	...	105
1993	4,360	296	1,308	930	509	340	241	188	230	133	73	...	113
1994	4,460	282	1,314	957	531	342	247	188	246	142	85	15	109
1995	4,592	280	1,289	1,012	552	366	254	198	261	157	88	20	114
1996	4,826	274	1,323	1,069	588	379	269	206	285	168	104	35	125
1997 <sup>a</sup>	4,970	269	1,296	1,128	604	387	282	220	305	179	109	55	135
1998 <sup>a</sup>	5,156	267	1,280	1,155	643	418	303	228	328	194	117	78	145
1999 <sup>a</sup>	5,356	265	1,276	1,200	678	431	312	241	345	218	128	121	142

a. Preliminary data.

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

NOTE: Taxable earnings consist of self-employment income and taxable wages. See Table 2.A3.  
... = not applicable.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

## 4.B OASDI: Covered Workers

**Table 4.B10—Number of workers, taxable earnings, and contributions, by type of employment and state or other area, 1999**

State or area <sup>a</sup>	Number of workers reported with taxable earnings <sup>b</sup> (thousands)			Reported taxable earnings <sup>c</sup> (millions of dollars)			OASDI contributions <sup>d</sup> (millions of dollars)		
	Total, all workers	Wage and salary workers	Self-employed persons	Total	Wages	Self-employment income	Total	Wage and salary employment	Self-employment
All areas.....	151,400	142,700	14,600	3,744,600	3,542,800	201,800	464,330	439,307	25,023
Alabama.....	2,308	2,183	207	50,337	47,822	2,515	6,242	5,930	312
Alaska.....	346	324	43	8,272	7,679	593	1,026	952	74
Arizona.....	2,529	2,402	217	60,430	57,406	3,024	7,493	7,118	375
Arkansas.....	1,406	1,316	147	27,365	25,688	1,677	3,393	3,185	208
California.....	16,137	14,876	1,923	428,870	396,751	32,119	53,180	49,197	3,983
Colorado.....	2,362	2,209	267	59,793	55,941	3,852	7,414	6,937	478
Connecticut.....	1,926	1,807	194	57,102	53,680	3,423	7,081	6,656	424
Delaware.....	482	465	31	12,725	12,333	392	1,578	1,529	49
District of Columbia.....	363	346	28	10,155	9,619	536	1,259	1,193	66
Florida.....	8,206	7,727	817	183,291	174,044	9,247	22,728	21,582	1,147
Georgia.....	4,356	4,125	395	106,011	100,864	5,147	13,145	12,507	638
Hawaii.....	627	589	59	15,509	14,719	790	1,923	1,825	98
Idaho.....	702	661	74	14,635	13,827	808	1,815	1,715	100
Illinois.....	6,672	6,328	594	174,929	166,714	8,215	21,691	20,673	1,019
Indiana.....	3,456	3,309	290	83,978	80,251	3,727	10,413	9,951	462
Iowa.....	1,713	1,599	204	37,977	35,413	2,564	4,709	4,391	318
Kansas.....	1,537	1,448	163	36,384	34,221	2,163	4,512	4,243	268
Kentucky.....	2,093	1,967	226	44,598	42,216	2,382	5,530	5,235	295
Louisiana.....	2,086	1,960	203	43,165	40,628	2,537	5,352	5,038	315
Maine.....	692	636	90	14,679	13,523	1,156	1,820	1,677	143
Maryland.....	2,936	2,799	248	83,614	80,011	3,603	10,368	9,921	447
Massachusetts.....	3,401	3,176	364	95,416	89,659	5,757	11,832	11,118	714
Michigan.....	5,691	5,456	429	152,395	146,881	5,514	18,897	18,213	684
Minnesota.....	2,999	2,839	301	78,222	74,046	4,176	9,700	9,182	518
Mississippi.....	1,445	1,367	132	28,645	26,964	1,681	3,552	3,344	208
Missouri.....	3,072	2,901	296	69,059	65,576	3,483	8,563	8,131	432
Montana.....	498	456	73	9,367	8,473	894	1,162	1,051	111
Nebraska.....	1,018	951	117	22,232	20,859	1,373	2,757	2,587	170
Nevada.....	1,030	987	71	24,120	23,064	1,056	2,991	2,860	131
New Hampshire.....	758	711	80	19,982	18,825	1,157	2,478	2,334	143
New Jersey.....	4,692	4,463	383	143,598	137,192	6,406	17,806	17,012	794
New Mexico.....	887	835	90	18,169	17,163	1,006	2,253	2,128	125
New York.....	9,812	9,234	955	270,894	257,649	13,245	33,591	31,948	1,642
North Carolina.....	4,460	4,213	427	104,470	99,011	5,459	12,954	12,277	677
North Dakota.....	374	344	53	7,493	6,854	639	929	850	79
Ohio.....	6,035	5,699	546	141,645	134,513	7,132	17,564	16,680	884
Oklahoma.....	1,807	1,685	200	37,506	35,421	2,085	4,651	4,392	259
Oregon.....	1,895	1,778	192	45,756	43,023	2,733	5,674	5,335	339
Pennsylvania.....	6,663	6,324	560	167,999	159,590	8,409	20,832	19,789	1,043
Rhode Island.....	585	556	54	14,584	13,866	718	1,808	1,719	89
South Carolina.....	2,170	2,062	177	48,111	45,945	2,166	5,966	5,697	269
South Dakota.....	453	416	63	8,783	7,961	823	1,089	987	102
Tennessee.....	3,165	2,977	321	71,373	66,948	4,425	8,850	8,302	549
Texas.....	10,205	9,542	1,086	241,875	227,401	14,474	29,992	28,198	1,795
Utah.....	1,177	1,128	94	25,715	24,587	1,128	3,189	3,049	140
Vermont.....	362	338	45	7,980	7,464	516	990	926	64
Virginia.....	3,951	3,766	328	104,771	100,417	4,354	12,992	12,452	540
Washington.....	3,269	3,097	294	86,475	81,872	4,603	10,723	10,152	571
West Virginia.....	860	816	76	17,938	17,018	920	2,224	2,110	114
Wisconsin.....	3,204	3,059	264	78,980	75,524	3,456	9,793	9,365	429
Wyoming.....	286	268	33	6,061	5,671	390	752	703	48
Outlying area									
Puerto Rico.....	1,163	1,104	66	17,093	16,045	1,048	2,120	1,990	130
Other and unknown <sup>e</sup> .....	1,079	1,073	9	24,071	23,964	106	2,985	2,972	13

- a. 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.
- b. Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment. National and state totals and subtotals are unduplicated counts of workers in each type of employment.
- c. Annual maximum taxable earnings for Social Security (OASDI) from a single employer or from self-employment were \$72,600 in 1999.
- d. For 1999 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.
- e. 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.

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

NOTE: Data are based on preliminary estimates.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

Table 4.B11—Number of workers, taxable earnings, and contributions, by type of employment, selected years 1937–2001

Year	Number of workers reported with taxable earnings <sup>a</sup> (thousands)			Reported taxable earnings <sup>b</sup> (millions of dollars)			OASDI contributions <sup>c, d</sup> (millions of dollars)		
	Total, all workers	Wage and salary workers	Self-employed persons	Total	Wages	Self-employment income	Total	Wage and salary employment	Self-employment
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
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 <sup>e</sup>	146,100	137,700	14,100	3,285,300	3,104,500	180,800	407,377	384,958	22,419
1998 <sup>e</sup>	148,900	140,400	14,300	3,521,500	3,330,100	191,400	436,666	412,932	23,734
1999 <sup>e</sup>	151,400	142,700	14,600	3,744,600	3,542,800	201,800	464,330	439,307	25,023
2000 <sup>f</sup>	153,700	144,900	14,700	3,991,100	3,780,400	210,700	494,896	468,770	26,127
2001 <sup>g</sup>	153,500	144,800	14,700	4,198,300	3,978,700	219,600	520,589	493,359	27,230

a. Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment.

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 the National Income and Product Accounts.

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

NOTE: ... = note applicable.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

## 4.B HI: Covered Workers

**Table 4.B12—Number of workers, taxable earnings, and contributions, by type of employment and state or other area, 1999**

State or area <sup>a</sup>	Number of workers reported with taxable earnings <sup>b</sup> (thousands)			Reported taxable earnings <sup>c</sup> (millions of dollars)			Medicare (Hospital Insurance) contributions <sup>d</sup> (millions of dollars)		
	Total, all workers	Wage and salary workers	Self- employed persons	Total	Wages	Self- employment income	Total	Wage and salary employment	Self- employment
All areas.....	154,700	146,100	15,300	4,612,100	4,304,900	307,200	133,751	124,842	8,909
Alabama.....	2,330	2,204	214	56,221	53,020	3,201	1,630	1,538	93
Alaska.....	366	345	44	10,281	9,492	788	298	275	23
Arizona.....	2,547	2,420	228	70,112	66,105	4,007	2,033	1,917	116
Arkansas.....	1,417	1,327	151	29,996	28,022	1,974	870	813	57
California.....	16,847	15,614	2,024	570,835	520,859	49,976	16,554	15,105	1,449
Colorado.....	2,489	2,342	278	79,661	74,054	5,607	2,310	2,148	163
Connecticut.....	1,958	1,840	210	83,398	76,560	6,838	2,419	2,220	198
Delaware.....	486	469	32	14,529	13,919	610	421	404	18
District of Columbia.....	377	360	30	14,681	13,060	1,622	426	379	47
Florida.....	8,283	7,804	847	217,199	205,257	11,942	6,299	5,952	346
Georgia.....	4,451	4,223	412	128,931	120,691	8,240	3,739	3,500	239
Hawaii.....	650	613	61	17,711	16,792	919	514	487	27
Idaho.....	708	666	75	15,875	14,974	901	460	434	26
Illinois.....	6,834	6,496	629	221,784	208,100	13,684	6,432	6,035	397
Indiana.....	3,481	3,333	302	93,636	88,388	5,248	2,715	2,563	152
Iowa.....	1,724	1,610	210	41,870	38,791	3,080	1,214	1,125	89
Kansas.....	1,548	1,458	168	42,268	39,293	2,975	1,226	1,140	86
Kentucky.....	2,135	2,009	233	50,482	47,423	3,059	1,464	1,375	89
Louisiana.....	2,232	2,110	210	53,270	49,440	3,829	1,545	1,434	111
Maine.....	718	664	92	16,803	15,469	1,334	487	449	39
Maryland.....	3,008	2,872	264	102,459	96,703	5,757	2,971	2,804	167
Massachusetts.....	3,581	3,368	391	133,288	121,503	11,785	3,865	3,524	342
Michigan.....	5,728	5,492	459	176,392	168,901	7,490	5,115	4,898	217
Minnesota.....	3,020	2,858	316	90,566	85,337	5,229	2,626	2,475	152
Mississippi.....	1,455	1,377	135	30,664	28,580	2,084	889	829	60
Missouri.....	3,135	2,965	308	80,986	75,962	5,024	2,349	2,203	146
Montana.....	503	461	74	10,243	9,052	1,191	297	262	35
Nebraska.....	1,025	959	122	24,687	22,933	1,754	716	665	51
Nevada.....	1,067	1,027	75	29,199	27,399	1,800	847	795	52
New Hampshire.....	766	720	84	23,902	22,305	1,597	693	647	46
New Jersey.....	4,727	4,498	419	190,010	179,014	10,996	5,510	5,191	319
New Mexico.....	900	848	92	19,874	18,684	1,190	576	542	35
New York.....	9,873	9,293	1,020	364,247	333,085	31,163	10,563	9,659	904
North Carolina.....	4,486	4,239	441	118,653	111,698	6,955	3,441	3,239	202
North Dakota.....	377	347	54	8,075	7,355	720	234	213	21
Ohio.....	6,408	6,094	571	175,604	165,196	10,408	5,093	4,791	302
Oklahoma.....	1,827	1,706	205	41,293	38,961	2,332	1,197	1,130	68
Oregon.....	1,910	1,792	198	51,982	48,580	3,402	1,507	1,409	99
Pennsylvania.....	6,720	6,380	591	198,650	186,895	11,755	5,761	5,420	341
Rhode Island.....	593	564	57	16,605	15,712	894	482	456	26
South Carolina.....	2,183	2,075	182	53,060	50,225	2,835	1,539	1,457	82
South Dakota.....	458	421	64	9,490	8,549	941	275	248	27
Tennessee.....	3,190	3,001	334	83,087	76,711	6,376	2,410	2,225	185
Texas.....	10,642	9,998	1,133	307,870	286,887	20,983	8,928	8,320	609
Utah.....	1,189	1,140	98	29,863	28,212	1,651	866	818	48
Vermont.....	364	340	46	9,001	8,372	630	261	243	18
Virginia.....	4,002	3,816	346	132,745	126,224	6,521	3,850	3,660	189
Washington.....	3,306	3,134	307	109,706	103,688	6,018	3,181	3,007	175
West Virginia.....	870	826	78	19,745	18,326	1,419	573	531	41
Wisconsin.....	3,221	3,075	275	88,241	83,694	4,547	2,559	2,427	132
Wyoming.....	288	271	34	7,145	6,587	557	207	191	16
Outlying area									
Puerto Rico.....	1,197	1,138	66	18,916	17,694	1,222	549	513	35
Other and unknown <sup>e</sup> .....	1,104	1,098	9	26,308	26,171	136	763	759	4

- a. 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.
- b. Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment. National and state totals and subtotals are unduplicated counts of workers in each type of employment.
- c. No annual maximum taxable earnings amount for Medicare.
- d. For 1999 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.
- e. 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.

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

NOTE: Data are based on preliminary estimates.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

Table 4.C1—Estimated number, by insured status, December 31, 1940–2002 (in millions)

Year	Workers fully insured for retirement or survivor benefits or both			Workers insured in event of disability
	Total	Permanently insured	Not permanently insured	
1940	24.2	1.1	23.1	...
1941	25.8	1.4	24.4	...
1942	28.1	1.8	26.3	...
1943	29.9	2.3	27.6	...
1944	31.9	2.8	29.1	...
1945	33.4	3.4	30.0	...
1946	35.4	8.6	26.8	...
1947	37.3	11.6	25.7	...
1948	38.9	13.2	25.7	...
1949	40.1	14.9	25.2	...
1950	59.8	21.0	38.8	...
1951	62.8	22.9	39.9	...
1952	68.2	25.6	42.7	...
1953	71.0	27.7	43.4	...
1954	70.2	29.9	40.4	31.9
1955	70.5	32.5	38.0	35.4
1956	74.0	36.1	38.0	37.2
1957	76.1	38.3	37.9	38.4
1958	76.5	40.3	36.2	43.4
1959	76.7	42.2	34.6	46.4
1960	84.4	47.6	36.8	48.5
1961	88.5	53.3	35.3	50.5
1962	89.8	54.9	34.8	51.5
1963	91.3	56.6	34.7	52.3
1964	92.8	58.3	34.5	53.3
1965	94.8	60.2	34.6	55.0
1966	97.2	61.9	35.3	55.7
1967	99.9	63.3	36.6	56.9
1968	102.6	64.5	38.1	70.1
1969	105.6	66.1	39.5	72.4
1970	108.3	67.3	41.0	74.5
1971	110.8	68.5	42.3	76.1
1972	113.5	69.8	43.7	77.8
1973	116.8	71.3	45.6	80.4
1974	120.2	72.7	47.5	83.3
1975	123.2	74.4	48.8	85.3
1976	126.0	76.1	49.9	87.0
1977	129.0	78.1	50.9	89.3
1978	133.3	80.3	53.0	93.7
1979	137.3	83.0	54.3	98.0
1980	140.4	85.3	55.0	100.3
1981	142.9	88.0	54.9	102.6
1982	144.7	90.7	54.0	104.5
1983	146.5	94.0	52.5	105.4
1984	148.3	96.9	51.4	107.1
1985	150.9	100.1	50.8	109.6
1986	153.2	103.3	49.9	111.6
1987	155.7	107.4	48.3	113.5
1988	158.3	110.7	47.6	115.7
1989	161.3	113.6	47.8	118.1
1990	164.0	116.4	47.6	120.1
1991	166.0	118.8	47.2	121.5
1992	167.5	121.1	46.4	122.9
1993	169.2	123.6	45.6	124.4
1994	170.8	125.9	44.9	126.2
1995	173.2	128.4	44.8	128.2
1996	175.3	130.9	44.4	130.3
1997	177.8	133.8	44.0	132.2
1998	180.2	136.3	43.9	134.2
1999	182.7	138.6	44.1	136.6
2000	185.1	140.8	44.3	138.8
2001	187.5	143.0	44.5	140.9
2002	189.9	145.2	44.7	143.1

SOURCE: Social Security Administration, 1-Percent Continuous Work History Sample (CWHS).

NOTES: Figures are subject to revision.

... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

4.C OASDI: Insured Workers

Table 4.C2—Estimated number, insured status, age, and sex, December 31, 1970–2002, selected years (in thousands)

Year	Total	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</i>														
<i>Total</i>														
1970	108,343	4,104	14,972	12,704	10,156	9,219	9,685	10,026	9,169	7,922	6,676	5,242	3,781	4,688
1975	123,150	5,304	16,938	17,057	12,716	10,148	9,237	9,604	9,716	8,630	7,513	6,204	4,385	5,698
1980	140,387	6,558	19,153	19,269	17,199	12,785	10,239	9,210	9,402	9,267	8,232	6,957	5,197	6,919
1985	150,868	4,301	17,735	20,771	19,298	17,100	12,779	10,205	9,042	9,020	8,842	7,507	5,889	8,380
1986	153,232	4,384	17,288	20,872	19,746	17,383	13,801	10,655	9,092	8,947	8,734	7,690	5,992	8,649
1987	155,730	4,545	16,824	20,840	20,195	17,723	14,539	11,310	9,305	8,795	8,787	7,837	6,078	8,953
1988	158,295	4,874	16,394	20,787	20,467	18,230	15,305	11,845	9,600	8,708	8,709	7,942	6,200	9,234
1989	161,346	5,045	16,333	20,770	20,777	18,760	16,159	12,350	9,768	8,746	8,711	8,116	6,244	9,567
1990	164,014	4,805	16,449	20,468	21,097	19,312	17,101	12,724	10,045	8,749	8,812	8,170	6,399	9,884
1991	165,950	4,325	16,440	19,971	21,327	19,807	17,430	13,700	10,481	8,806	8,727	8,133	6,617	10,186
1992	167,487	3,960	16,132	19,380	21,379	20,306	17,764	14,470	11,101	9,004	8,542	8,176	6,768	10,507
1993	169,169	3,743	15,740	18,870	21,378	20,681	18,260	15,201	11,655	9,274	8,501	8,174	6,876	10,817
1994	170,824	3,753	15,237	18,557	21,232	20,983	18,783	16,028	12,151	9,473	8,404	8,117	7,037	11,070
1995	173,172	3,983	14,850	18,561	20,854	21,253	19,317	16,928	12,550	9,746	8,510	8,126	7,093	11,402
1996	175,344	4,226	14,609	18,543	20,354	21,439	19,806	17,368	13,394	10,160	8,515	8,088	7,071	11,772
1997	177,845	4,377	14,697	18,417	19,825	21,523	20,296	17,660	14,243	10,732	8,793	8,026	7,140	12,117
1998	180,195	4,629	14,975	18,158	19,379	21,561	20,677	18,125	14,944	11,302	8,941	7,932	7,156	12,417
1999	182,707	4,814	15,381	17,796	19,140	21,461	21,010	18,636	15,743	11,795	9,199	7,937	7,102	12,695
2000	185,064	4,888	15,814	17,379	19,124	21,139	21,317	19,182	16,615	12,207	9,419	7,920	7,108	12,951
2001	187,542	4,852	16,332	17,111	19,151	20,652	21,527	19,729	17,138	12,961	9,809	8,014	7,087	13,180
2002	189,896	4,746	16,814	17,138	19,039	20,123	21,629	20,227	17,427	13,852	10,323	8,147	7,045	13,386
<i>Male</i>														
1970	62,946	2,702	8,563	7,108	5,861	5,431	5,681	5,766	5,298	4,694	3,905	3,025	2,172	2,742
1975	69,315	3,210	9,376	9,230	7,153	5,847	5,367	5,543	5,527	4,919	4,278	3,426	2,413	3,024
1980	76,634	3,700	10,223	10,198	9,311	7,119	5,788	5,247	5,338	5,213	4,567	3,762	2,751	3,416
1985	80,721	2,325	9,407	10,871	10,233	9,220	7,029	5,676	5,073	5,052	4,861	3,991	3,067	3,917
1986	81,703	2,349	9,139	10,911	10,434	9,306	7,554	5,892	5,086	5,003	4,797	4,105	3,113	4,016
1987	82,744	2,419	8,850	10,885	10,647	9,428	7,898	6,227	5,190	4,905	4,834	4,182	3,146	4,133
1988	83,808	2,588	8,596	10,850	10,762	9,647	8,251	6,486	5,332	4,847	4,780	4,237	3,196	4,237
1989	85,239	2,697	8,579	10,860	10,889	9,904	8,652	6,726	5,394	4,854	4,778	4,326	3,214	4,367
1990	86,474	2,568	8,652	10,728	11,050	10,177	9,093	6,893	5,514	4,849	4,823	4,339	3,299	4,488
1991	87,288	2,303	8,615	10,475	11,174	10,420	9,210	7,384	5,719	4,872	4,783	4,318	3,411	4,606
1992	87,893	2,077	8,463	10,155	11,204	10,675	9,344	7,749	6,030	4,967	4,676	4,337	3,486	4,730
1993	88,543	1,957	8,231	9,866	11,208	10,858	9,577	8,089	6,297	5,093	4,640	4,334	3,542	4,851
1994	89,194	1,962	7,954	9,689	11,128	10,995	9,842	8,480	6,533	5,171	4,567	4,300	3,622	4,952
1995	90,183	2,078	7,700	9,664	10,930	11,117	10,109	8,908	6,719	5,288	4,624	4,307	3,638	5,100
1996	91,109	2,177	7,558	9,627	10,660	11,201	10,352	9,094	7,140	5,485	4,631	4,290	3,628	5,266
1997	92,120	2,255	7,574	9,526	10,363	11,236	10,596	9,211	7,552	5,771	4,740	4,245	3,651	5,402
1998	93,070	2,382	7,681	9,363	10,103	11,245	10,784	9,429	7,874	6,046	4,793	4,183	3,656	5,530
1999	94,135	2,478	7,848	9,144	9,950	11,189	10,938	9,681	8,247	6,282	4,906	4,180	3,634	5,657
2000	95,174	2,522	8,075	8,897	9,905	11,017	11,080	9,954	8,671	6,476	4,998	4,156	3,651	5,772
2001	96,271	2,504	8,348	8,732	9,886	10,753	11,168	10,228	8,904	6,848	5,188	4,186	3,643	5,884
2002	97,298	2,448	8,598	8,727	9,788	10,455	11,207	10,474	9,017	7,284	5,453	4,243	3,619	5,985
<i>Female</i>														
1970	45,398	1,402	6,409	5,597	4,295	3,788	4,004	4,260	3,872	3,229	2,771	2,217	1,608	1,947
1975	53,835	2,094	7,562	7,827	5,563	4,301	3,870	4,061	4,189	3,710	3,235	2,778	1,972	2,674
1980	63,752	2,858	8,931	9,071	7,888	5,666	4,452	3,963	4,064	4,054	3,664	3,195	2,446	3,503
1985	70,147	1,976	8,328	9,900	9,066	7,880	5,750	4,528	3,969	3,968	3,981	3,516	2,822	4,464
1986	71,529	2,035	8,149	9,961	9,312	8,077	6,248	4,763	4,006	3,944	3,937	3,585	2,879	4,633
1987	72,986	2,126	7,974	9,955	9,548	8,295	6,641	5,083	4,115	3,889	3,953	3,655	2,931	4,820
1988	74,487	2,286	7,798	9,937	9,705	8,583	7,054	5,359	4,268	3,861	3,929	3,705	3,004	4,997
1989	76,107	2,348	7,754	9,911	9,888	8,857	7,507	5,625	4,374	3,892	3,933	3,790	3,029	5,200
1990	77,540	2,237	7,796	9,739	10,047	9,135	8,007	5,831	4,532	3,900	3,988	3,831	3,100	5,396
1991	78,663	2,023	7,825	9,496	10,153	9,387	8,220	6,316	4,762	3,934	3,944	3,815	3,206	5,581
1992	79,594	1,883	7,670	9,225	10,174	9,630	8,420	6,721	5,071	4,038	3,866	3,839	3,282	5,777
1993	80,627	1,786	7,510	9,004	10,170	9,824	8,683	7,112	5,358	4,181	3,861	3,840	3,335	5,966
1994	81,630	1,791	7,283	8,869	10,104	9,987	8,941	7,548	5,618	4,302	3,837	3,817	3,415	6,118
1995	82,989	1,905	7,150	8,897	9,924	10,136	9,208	8,021	5,831	4,458	3,885	3,819	3,455	6,301
1996	84,235	2,048	7,051	8,916	9,693	10,237	9,454	8,274	6,254	4,676	3,884	3,799	3,443	6,506
1997	85,726	2,122	7,123	8,892	9,462	10,287	9,700	8,449	6,691	4,961	4,053	3,780	3,489	6,715
1998	87,125	2,248	7,294	8,795	9,276	10,315	9,892	8,696	7,071	5,256	4,148	3,748	3,500	6,887
1999	88,573	2,336	7,533	8,652	9,191	10,271	10,071	8,955	7,497	5,513	4,293	3,756	3,468	7,038
2000	89,890	2,366	7,739	8,482	9,219	10,122	10,238	9,227	7,944	5,731	4,421	3,763	3,458	7,179
2001	91,271	2,348	7,984	8,380	9,266	9,898	10,359	9,501	8,233	6,113	4,621	3,828	3,444	7,295
2002	92,598	2,298	8,217	8,411	9,251	9,668	10,422	9,753	8,410	6,568	4,870	3,905	3,426	7,401



**Table 4.C2—Estimated number, insured status, age, and sex, December 31, 1970–2002, selected years  
(in thousands)—Continued**

Year	Total	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>Disability insured</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	...	...	...
1986	111,647	4,198	15,636	18,143	16,380	14,195	11,370	9,048	7,890	7,669	7,118	...	...	...
1987	113,499	4,325	15,243	18,229	16,781	14,478	12,128	9,615	7,985	7,560	7,155	...	...	...
1988	115,679	4,631	14,969	18,180	17,109	14,945	12,778	10,162	8,258	7,493	7,154	...	...	...
1989	118,062	4,795	14,939	18,172	17,375	15,521	13,530	10,616	8,486	7,541	7,087	...	...	...
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	132,229	4,160	13,392	16,293	17,212	18,620	17,685	15,540	12,652	9,440	7,234	...	...	...
1998	134,196	4,376	13,626	16,104	16,803	18,673	18,036	15,925	13,255	9,970	7,428	...	...	...
1999	136,608	4,604	14,011	15,852	16,599	18,681	18,336	16,482	13,992	10,404	7,648	...	...	...
2000	138,757	4,668	14,499	15,540	16,649	18,341	18,608	16,975	14,806	10,788	7,882	...	...	...
2001	140,942	4,589	14,934	15,345	16,760	18,020	18,832	17,469	15,276	11,466	8,251	...	...	...
2002	143,078	4,473	15,452	15,402	16,722	17,572	19,004	17,935	15,561	12,262	8,695	...	...	...
<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	...	...	...
1986	63,611	2,250	8,455	9,980	9,415	8,327	6,667	5,237	4,603	4,479	4,198	...	...	...
1987	64,231	2,298	8,190	9,970	9,583	8,413	7,052	5,513	4,635	4,372	4,205	...	...	...
1988	65,069	2,453	8,014	9,927	9,689	8,611	7,344	5,802	4,735	4,312	4,183	...	...	...
1989	66,052	2,562	7,990	9,886	9,777	8,873	7,700	6,005	4,833	4,309	4,118	...	...	...
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	71,591	2,139	6,987	8,647	9,438	10,296	9,716	8,336	6,843	5,146	4,044	...	...	...
1998	72,370	2,245	7,071	8,491	9,165	10,320	9,869	8,527	7,132	5,428	4,123	...	...	...
1999	73,399	2,366	7,233	8,320	8,985	10,298	10,011	8,826	7,485	5,644	4,233	...	...	...
2000	73,886	2,404	7,519	8,117	8,939	9,992	10,037	9,012	7,808	5,765	4,293	...	...	...
2001	74,934	2,379	7,727	7,990	8,969	9,815	10,151	9,276	8,034	6,115	4,478	...	...	...
2002	75,809	2,322	8,031	7,991	8,907	9,515	10,229	9,503	8,129	6,482	4,700	...	...	...
<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	...	...	...
1986	48,036	1,948	7,182	8,163	6,965	5,868	4,703	3,811	3,287	3,190	2,920	...	...	...
1987	49,268	2,027	7,054	8,259	7,198	6,064	5,075	4,102	3,351	3,188	2,950	...	...	...
1988	50,610	2,178	6,955	8,252	7,420	6,334	5,434	4,360	3,524	3,181	2,971	...	...	...
1989	52,009	2,233	6,949	8,286	7,598	6,648	5,830	4,610	3,653	3,233	2,970	...	...	...
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	60,639	2,021	6,405	7,646	7,775	8,325	7,969	7,205	5,809	4,295	3,190	...	...	...
1998	61,827	2,131	6,556	7,613	7,637	8,354	8,167	7,398	6,124	4,541	3,306	...	...	...
1999	63,208	2,238	6,779	7,532	7,614	8,383	8,325	7,656	6,507	4,760	3,414	...	...	...
2000	64,871	2,264	6,980	7,424	7,710	8,349	8,572	7,963	6,998	5,023	3,589	...	...	...
2001	66,008	2,210	7,207	7,355	7,791	8,205	8,681	8,193	7,241	5,351	3,773	...	...	...
2002	67,269	2,151	7,421	7,411	7,815	8,057	8,775	8,431	7,432	5,780	3,994	...	...	...

SOURCE: Social Security Administration, 1-Percent Continuous Work History Sample (CWHS).

NOTES: Figures are subject to revision.

... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

#### 4.C OASDI: Insured Workers

**Table 4.C5—Estimated size of the population in the Social Security area and percentage fully insured, by age and sex, 1998–2002 (in thousands)**

Age attained at end of year	1998		1999		2000		2001		2002	
	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured
<b>All fully insured persons</b>										
Total.....	282,172	a 87	284,495	a 88	287,064	a 88	289,583	a 88	292,050	a 89
Under 15.....	61,565	b	61,806	b	62,092	b	62,364	b	62,588	b
15–19.....	19,861	23	19,995	24	20,117	24	20,223	24	20,328	23
20–24.....	18,358	82	18,758	82	19,236	82	19,696	83	20,090	84
25–29.....	19,638	92	19,254	92	18,810	92	18,547	92	18,611	92
30–34.....	20,995	92	20,696	92	20,647	93	20,613	93	20,427	93
35–39.....	23,458	92	23,270	92	22,897	92	22,365	92	21,790	92
40–44.....	22,641	91	22,992	91	23,318	91	23,503	92	23,544	92
45–49.....	19,836	91	20,354	92	20,927	92	21,511	92	22,063	92
50–54.....	16,687	90	17,461	90	18,358	91	18,863	91	19,106	91
55–59.....	13,113	86	13,558	87	13,935	88	14,693	88	15,596	89
60–64.....	10,724	83	10,917	84	11,140	85	11,481	85	12,001	86
65–69.....	9,682	82	9,608	83	9,581	83	9,604	83	9,740	84
70–74.....	8,957	80	8,934	79	8,922	80	8,868	80	8,737	81
75 or older.....	16,659	75	16,892	75	17,085	76	17,253	76	17,428	77
<b>Male</b>										
Subtotal.....	139,180	a 93	140,366	a 93	141,658	a 93	142,939	a 93	144,196	a 93
Under 15.....	31,484	b	31,602	b	31,745	b	31,884	b	31,999	b
15–19.....	10,172	23	10,241	24	10,300	24	10,351	24	10,400	24
20–24.....	9,353	82	9,565	82	9,821	82	10,065	83	10,273	84
25–29.....	9,922	94	9,721	94	9,501	94	9,381	93	9,426	93
30–34.....	10,615	95	10,450	95	10,406	95	10,374	95	10,269	95
35–39.....	11,859	95	11,758	95	11,558	95	11,279	95	10,976	95
40–44.....	11,375	95	11,558	95	11,727	94	11,824	94	11,845	95
45–49.....	9,877	95	10,139	95	10,429	95	10,726	95	11,011	95
50–54.....	8,251	95	8,635	96	9,080	95	9,328	95	9,446	95
55–59.....	6,416	94	6,634	95	6,818	95	7,194	95	7,642	95
60–64.....	5,158	93	5,255	93	5,364	93	5,531	94	5,788	94
65–69.....	4,532	92	4,504	93	4,494	92	4,511	93	4,581	93
70–74.....	3,991	92	4,003	91	4,015	91	4,003	91	3,953	92
75 or older.....	6,174	90	6,300	90	6,399	90	6,488	91	6,586	91
<b>Female</b>										
Subtotal.....	142,992	a 82	144,129	a 83	145,406	a 83	146,644	a 84	147,854	a 84
Under 15.....	30,081	b	30,204	b	30,346	b	30,480	b	30,588	b
15–19.....	9,688	23	9,754	24	9,817	24	9,872	24	9,928	23
20–24.....	9,006	81	9,192	82	9,415	82	9,631	83	9,816	84
25–29.....	9,715	91	9,533	91	9,308	91	9,167	91	9,185	92
30–34.....	10,380	89	10,246	90	10,241	90	10,239	90	10,158	91
35–39.....	11,599	89	11,512	89	11,339	89	11,087	89	10,815	89
40–44.....	11,265	88	11,434	88	11,591	88	11,679	89	11,699	89
45–49.....	9,959	87	10,215	88	10,499	88	10,785	88	11,052	88
50–54.....	8,436	84	8,826	85	9,278	86	9,535	86	9,660	87
55–59.....	6,696	78	6,923	80	7,117	81	7,499	82	7,955	83
60–64.....	5,565	75	5,662	76	5,776	77	5,949	78	6,213	78
65–69.....	5,150	73	5,104	74	5,087	74	5,093	75	5,159	76
70–74.....	4,966	70	4,931	70	4,907	70	4,864	71	4,784	72
75 or older.....	10,485	66	10,592	66	10,686	67	10,764	68	10,842	68

a. Percentage of population fully insured aged 20 or older.  
b. Less than 0.5 percent.

SOURCE: U.S. Census Bureau, 100 percent data.

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 Puerto Rico, the Virgin Islands, Guam, American Samoa, and the Northern Mariana 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.  
Population estimates are subject to revision.

CONTACT: Felicitie Bell (410) 965-3020 or Michael Miller (410) 966-4157.

Table 4.C6—Period life table, 1999

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	0.007725	100,000	73.63	0.006363	100,000	79.22	60	0.013115	84,217	19.27	0.008081	90,666	22.88
1	0.000556	99,228	73.20	0.000467	99,364	78.73	61	0.014272	83,113	18.52	0.008840	89,934	22.06
2	0.000404	99,172	72.24	0.000307	99,317	77.77	62	0.015648	81,927	17.78	0.009726	89,139	21.25
3	0.000304	99,132	71.27	0.000236	99,287	76.79	63	0.017287	80,645	17.06	0.010761	88,272	20.46
4	0.000238	99,102	70.29	0.000191	99,263	75.81	64	0.019154	79,250	16.35	0.011927	87,322	19.67
5	0.000218	99,079	69.30	0.000175	99,244	74.82	65	0.021241	77,732	15.66	0.013241	86,280	18.90
6	0.000209	99,057	68.32	0.000165	99,227	73.84	66	0.023446	76,081	14.99	0.014635	85,138	18.15
7	0.000199	99,036	67.33	0.000156	99,211	72.85	67	0.025662	74,298	14.33	0.016017	83,892	17.41
8	0.000181	99,017	66.35	0.000146	99,195	71.86	68	0.027831	72,391	13.70	0.017345	82,548	16.69
9	0.000155	98,999	65.36	0.000134	99,181	70.87	69	0.030044	70,376	13.08	0.018691	81,116	15.98
10	0.000135	98,983	64.37	0.000124	99,167	69.88	70	0.032524	68,262	12.46	0.020227	79,600	15.27
11	0.000140	98,970	63.38	0.000125	99,155	68.89	71	0.035335	66,042	11.87	0.022009	77,990	14.57
12	0.000196	98,956	62.39	0.000145	99,143	67.90	72	0.038356	63,708	11.28	0.023951	76,274	13.89
13	0.000316	98,937	61.40	0.000190	99,128	66.91	73	0.041597	61,265	10.71	0.026064	74,447	13.22
14	0.000483	98,905	60.42	0.000252	99,110	65.92	74	0.045147	58,716	10.16	0.028418	72,506	12.56
15	0.000668	98,858	59.45	0.000324	99,085	64.94	75	0.049138	56,065	9.61	0.031148	70,446	11.91
16	0.000840	98,792	58.49	0.000390	99,052	63.96	76	0.053668	53,310	9.08	0.034302	68,252	11.28
17	0.000992	98,709	57.54	0.000439	99,014	62.98	77	0.058760	50,449	8.57	0.037840	65,911	10.66
18	0.001107	98,611	56.59	0.000461	98,970	62.01	78	0.064471	47,485	8.08	0.041789	63,416	10.06
19	0.001193	98,502	55.65	0.000465	98,925	61.04	79	0.070846	44,423	7.60	0.046230	60,766	9.48
20	0.001278	98,384	54.72	0.000465	98,879	60.07	80	0.077902	41,276	7.14	0.051327	57,957	8.92
21	0.001362	98,258	53.79	0.000471	98,833	59.09	81	0.085689	38,061	6.70	0.057120	54,982	8.37
22	0.001413	98,124	52.86	0.000477	98,786	58.12	82	0.094278	34,799	6.28	0.063546	51,842	7.85
23	0.001426	97,986	51.94	0.000488	98,739	57.15	83	0.103713	31,519	5.88	0.070628	48,547	7.35
24	0.001411	97,846	51.01	0.000501	98,691	56.18	84	0.114002	28,250	5.50	0.078472	45,119	6.87
25	0.001384	97,708	50.08	0.000517	98,641	55.20	85	0.125143	25,029	5.15	0.087210	41,578	6.41
26	0.001364	97,573	49.15	0.000534	98,590	54.23	86	0.137131	21,897	4.81	0.096955	37,952	5.97
27	0.001360	97,440	48.22	0.000555	98,538	53.26	87	0.149965	18,894	4.50	0.107787	34,272	5.56
28	0.001382	97,307	47.28	0.000583	98,483	52.29	88	0.163648	16,061	4.20	0.119750	30,578	5.17
29	0.001425	97,173	46.35	0.000617	98,426	51.32	89	0.178186	13,432	3.93	0.132855	26,917	4.81
30	0.001478	97,034	45.41	0.000655	98,365	50.35	90	0.193580	11,039	3.67	0.147095	23,341	4.47
31	0.001533	96,891	44.48	0.000699	98,301	49.38	91	0.209827	8,902	3.43	0.162455	19,907	4.15
32	0.001597	96,742	43.55	0.000752	98,232	48.42	92	0.226917	7,034	3.21	0.178905	16,673	3.86
33	0.001669	96,588	42.61	0.000816	98,158	47.46	93	0.244834	5,438	3.01	0.196415	13,690	3.59
34	0.001751	96,427	41.68	0.000890	98,078	46.49	94	0.263553	4,107	2.82	0.214944	11,001	3.35
35	0.001848	96,258	40.76	0.000974	97,991	45.53	95	0.282309	3,024	2.66	0.233745	8,637	3.13
36	0.001961	96,080	39.83	0.001062	97,895	44.58	96	0.300905	2,170	2.50	0.252585	6,618	2.93
37	0.002089	95,891	38.91	0.001154	97,791	43.63	97	0.319135	1,517	2.37	0.271209	4,946	2.75
38	0.002233	95,691	37.99	0.001245	97,678	42.68	98	0.336780	1,033	2.24	0.289344	3,605	2.58
39	0.002395	95,477	37.07	0.001340	97,557	41.73	99	0.353619	685	2.12	0.306705	2,562	2.43
40	0.002574	95,249	36.16	0.001445	97,426	40.78	100	0.371300	443	2.01	0.325107	1,776	2.29
41	0.002773	95,004	35.25	0.001562	97,285	39.84	101	0.389865	278	1.90	0.344614	1,199	2.15
42	0.003002	94,740	34.35	0.001687	97,133	38.90	102	0.409358	170	1.80	0.365290	786	2.02
43	0.003263	94,456	33.45	0.001820	96,969	37.97	103	0.429826	100	1.70	0.387208	499	1.89
44	0.003553	94,148	32.56	0.001965	96,793	37.04	104	0.451318	57	1.60	0.410440	306	1.77
45	0.003882	93,813	31.67	0.002128	96,603	36.11	105	0.473883	31	1.51	0.435067	180	1.66
46	0.004234	93,449	30.79	0.002310	96,397	35.18	106	0.497578	17	1.42	0.461171	102	1.55
47	0.004579	93,053	29.92	0.002508	96,174	34.26	107	0.522456	8	1.34	0.488841	55	1.44
48	0.004907	92,627	29.06	0.002722	95,933	33.35	108	0.548579	4	1.26	0.518171	28	1.34
49	0.005237	92,173	28.20	0.002956	95,672	32.44	109	0.576008	2	1.18	0.549261	14	1.25
50	0.005598	91,690	27.35	0.003217	95,389	31.53	110	0.604808	1	1.11	0.582217	6	1.16
51	0.006021	91,177	26.50	0.003513	95,082	30.63	111	0.635049	0	1.04	0.617150	3	1.07
52	0.006521	90,628	25.65	0.003848	94,748	29.74	112	0.666801	0	0.97	0.654179	1	0.99
53	0.007116	90,037	24.82	0.004226	94,384	28.85	113	0.700141	0	0.90	0.693430	0	0.91
54	0.007798	89,396	23.99	0.004649	93,985	27.97	114	0.735148	0	0.84	0.735036	0	0.84
55	0.008577	88,699	23.18	0.005128	93,548	27.10	115	0.771906	0	0.78	0.771906	0	0.78
56	0.009421	87,938	22.37	0.005654	93,068	26.24	116	0.810501	0	0.72	0.810501	0	0.72
57	0.010293	87,110	21.58	0.006210	92,542	25.38	117	0.851026	0	0.67	0.851026	0	0.67
58	0.011176	86,213	20.80	0.006789	91,967	24.54	118	0.893577	0	0.61	0.893577	0	0.61
59	0.012108	85,249	20.03	0.007409	91,343	23.70	119	0.938256	0	0.56	0.938256	0	0.56

a. Probability of dying within one year.

b. Number of survivors out of 100,000 born alive.

SOURCES: National Center for Health Statistics and the U.S. Census Bureau, 100 percent data.

CONTACT: Felicitie Bell (410) 965-3020.

## 5.A OASDI Current-Pay Benefits

**Table 5.A1—Number and average monthly benefit, by type of benefit and race, December 2001**

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 <sup>d</sup> .....	45,874,040	795.70	39,114,800	821.10	4,696,080	662.20	1,900,000	609.90
OASI .....	38,961,000	816.80	34,153,620	837.70	3,463,350	679.10	1,230,320	631.40
Retirement benefits .....	32,046,170	831.00	28,480,040	846.60	2,550,650	719.30	935,790	662.20
Retired workers .....	28,841,820	874.50	25,637,100	890.50	2,326,640	753.50	807,730	718.10
Spouses of retired workers.....	2,737,720	443.30	2,499,230	452.70	131,000	363.80	99,140	315.10
Children of retired workers .....	466,630	413.60	343,710	437.70	93,010	364.10	28,920	289.70
Survivor benefits.....	6,914,800	751.50	5,673,560	792.90	912,700	567.10	294,530	533.80
Children of deceased workers.....	1,890,280	569.70	1,273,400	613.60	431,100	480.50	167,180	466.20
Widowed mothers and fathers.....	195,160	618.50	137,460	661.00	32,320	528.00	23,200	494.20
Nondisabled widow(er)s .....	4,624,690	840.80	4,111,080	861.50	407,200	670.70	93,950	668.90
Disabled widow(er)s .....	202,020	535.20	150,070	555.00	41,760	479.30	9,470	469.80
Parents of deceased workers.....	2,650	737.00	1,550	769.00	320	691.00	730	697.80
DI .....	6,913,040	676.80	4,961,180	706.90	1,232,730	614.50	669,680	570.50
Disabled workers.....	5,265,190	814.90	3,851,540	839.50	904,290	757.80	471,950	726.90
Spouses of disabled workers .....	157,430	206.50	119,100	216.30	19,480	184.80	18,040	166.40
Children of disabled workers.....	1,490,420	238.50	990,540	250.40	308,960	222.10	179,690	200.30

a. Includes 163,160 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.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.A1.1—Number and average monthly benefit for retired workers, by race, age, and sex, December 2001

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 retired workers</b>								
Total .....	28,841,820	874.50	25,637,100	890.50	2,326,640	753.50	807,730	718.10
62–64 .....	2,570,130	806.90	2,250,860	821.30	225,150	735.90	94,040	633.20
62 .....	676,780	796.10	590,660	809.20	59,770	740.20	26,330	629.90
63 .....	917,770	807.80	805,660	821.90	79,820	735.20	32,260	634.40
64 .....	975,580	813.70	854,540	829.10	85,560	733.60	35,450	634.60
65–69 .....	7,408,930	867.90	6,436,530	886.10	685,520	764.60	281,780	704.30
65 .....	1,551,180	875.00	1,344,240	892.70	140,940	780.70	65,360	715.70
66 .....	1,549,340	862.30	1,342,530	880.80	146,480	757.90	59,510	702.90
67 .....	1,494,780	858.80	1,299,070	877.00	138,390	759.10	56,260	685.10
68 .....	1,401,030	865.30	1,218,230	884.00	128,850	757.30	52,750	701.60
69 .....	1,412,600	878.30	1,232,460	896.50	130,860	767.70	47,900	716.00
70–74 .....	6,636,340	870.60	5,896,120	886.80	534,040	751.20	190,340	716.00
70 .....	1,386,660	869.20	1,225,260	886.40	114,720	754.50	44,530	701.00
71 .....	1,385,350	864.90	1,229,010	881.80	112,090	748.30	42,010	692.10
72 .....	1,300,470	864.00	1,154,220	879.80	105,700	746.60	37,070	720.80
73 .....	1,294,600	874.90	1,153,910	890.10	102,250	755.20	34,550	741.10
74 .....	1,269,260	880.50	1,133,720	896.40	99,280	751.60	32,180	735.40
75–79 .....	5,471,900	871.20	4,923,730	885.30	403,750	743.10	123,310	741.80
75 .....	1,197,870	872.70	1,074,250	887.10	91,630	748.60	27,540	736.20
76 .....	1,152,370	884.60	1,034,890	899.50	86,540	752.20	26,720	750.70
77 .....	1,118,910	870.10	1,007,690	884.20	82,150	739.60	24,770	743.70
78 .....	1,036,500	863.50	936,310	876.80	73,070	736.20	23,380	737.00
79 .....	966,250	862.90	870,590	876.40	70,360	736.30	20,900	741.20
80–84 .....	3,751,790	889.00	3,408,190	902.40	257,020	747.50	69,680	762.60
80 .....	935,710	862.60	849,300	875.90	64,320	727.00	18,200	733.80
81 .....	830,830	862.30	754,050	875.00	56,980	732.30	16,020	738.50
82 .....	716,410	877.50	647,380	891.10	52,270	741.60	13,350	753.30
83 .....	676,540	919.30	617,040	932.90	44,660	771.00	11,800	776.20
84 .....	592,300	947.10	540,420	960.80	38,790	784.80	10,310	847.00
85–89 .....	2,027,770	975.90	1,844,380	990.80	141,470	803.30	33,220	874.70
85 .....	523,440	1,005.80	476,530	1,020.90	36,560	832.80	8,230	905.30
86 .....	463,360	990.20	422,850	1,004.10	30,400	821.30	7,990	892.90
87 .....	409,900	972.60	372,100	988.30	29,270	790.90	6,720	871.40
88 .....	343,450	954.60	312,520	969.20	23,910	786.30	5,670	843.20
89 .....	287,620	928.80	260,380	943.50	21,330	763.00	4,610	832.00
90–94 .....	769,430	894.90	696,160	910.80	59,000	724.40	12,090	794.60
95 or older .....	205,530	825.70	181,130	846.90	20,690	651.80	3,270	745.60
<b>Men</b>								
Subtotal .....	14,930,060	984.90	13,332,820	1,005.60	1,111,210	826.00	454,990	773.70
62–64 .....	1,332,710	962.90	1,163,380	989.50	118,470	813.10	50,800	703.40
62 .....	344,390	960.30	298,940	986.60	31,590	818.80	13,840	716.00
63 .....	476,480	963.60	417,160	989.50	41,700	812.30	17,600	707.90
64 .....	511,840	963.90	447,280	991.40	45,180	809.80	19,360	690.30
65–69 .....	4,124,650	1,000.40	3,603,050	1,026.70	353,840	844.10	164,580	765.60
65 .....	861,490	1,016.70	749,250	1,043.90	73,440	863.20	38,450	781.50
66 .....	864,420	996.20	753,040	1,023.00	75,590	838.90	35,250	762.60
67 .....	834,090	988.90	729,070	1,015.00	71,500	837.90	32,900	742.60
68 .....	781,990	992.50	684,410	1,018.40	66,060	834.30	30,720	762.90
69 .....	782,660	1,007.20	687,280	1,032.40	67,250	845.30	27,260	778.00
70–74 .....	3,628,490	987.20	3,248,160	1,008.00	266,200	825.40	106,380	769.80
70 .....	767,080	990.00	682,990	1,012.60	57,690	829.20	25,060	754.90
71 .....	765,230	982.20	683,550	1,004.10	57,050	822.10	23,320	742.80
72 .....	711,130	977.70	636,830	997.40	52,220	822.20	20,440	779.00
73 .....	702,490	991.50	630,820	1,010.80	50,710	831.70	19,450	801.70
74 .....	682,560	995.00	613,970	1,015.40	48,530	822.00	18,110	780.80
75–79 .....	2,857,890	965.40	2,588,060	982.30	191,780	804.90	69,140	787.30
75 .....	640,420	977.90	578,070	996.00	44,720	814.30	15,690	783.10
76 .....	604,110	991.40	546,350	1,009.70	41,470	817.10	14,500	810.20
77 .....	580,890	966.10	526,610	982.80	38,650	805.90	13,900	788.00
78 .....	536,690	946.50	487,920	962.00	33,940	793.20	13,240	778.10
79 .....	495,780	936.90	449,110	952.60	33,000	787.80	11,810	774.10
80–84 .....	1,812,220	951.90	1,657,990	965.70	108,970	798.00	38,320	800.50
80 .....	470,900	928.50	430,270	942.60	29,110	776.40	9,900	771.80
81 .....	412,400	915.20	376,540	928.40	24,910	769.60	9,360	782.50
82 .....	344,400	933.30	313,340	947.10	22,390	790.20	7,350	785.80
83 .....	315,140	987.70	289,590	1,001.30	17,980	831.90	6,320	813.20
84 .....	269,380	1,030.80	248,250	1,044.00	14,580	859.70	5,390	889.40

See footnotes at end of table.

5.A OASDI Current-Pay Benefits

Table 5.A1.1—Number and average monthly benefit for retired workers, by race, age, and sex, December 2001—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>Men—Continued</b>								
85–89.....	847,870	1,080.60	778,060	1,095.20	49,130	896.00	17,290	939.40
85.....	230,130	1,113.00	211,660	1,128.70	13,440	919.00	4,200	960.30
86.....	198,610	1,100.40	182,640	1,112.80	10,990	930.20	4,140	990.70
87.....	169,630	1,071.60	154,930	1,086.80	10,380	888.10	3,600	934.00
88.....	138,050	1,056.90	127,090	1,071.20	7,670	871.90	2,840	881.90
89.....	111,450	1,021.90	101,740	1,036.40	6,650	833.00	2,510	892.60
90–94.....	269,660	972.40	244,360	988.30	17,720	793.30	6,840	838.30
95 or older.....	56,570	906.00	49,760	928.40	5,100	723.70	1,640	791.30
<b>Women</b>								
Subtotal.....	13,911,760	755.90	12,304,280	765.80	1,215,430	687.20	352,740	646.30
62–64.....	1,237,420	639.00	1,087,480	641.40	106,680	650.20	43,240	550.70
62.....	332,390	626.00	291,720	627.40	28,180	652.00	12,490	534.60
63.....	441,290	639.50	388,500	642.00	38,120	650.90	14,660	546.10
64.....	463,740	647.80	407,260	651.00	40,380	648.30	16,090	567.50
65–69.....	3,284,280	701.40	2,833,480	707.40	331,680	679.80	117,200	618.20
65.....	689,690	698.00	594,990	702.30	67,500	690.90	26,910	621.70
66.....	684,920	693.30	589,490	699.10	70,890	671.40	24,260	616.30
67.....	660,690	694.40	570,000	700.50	66,890	674.90	23,360	604.10
68.....	619,040	704.50	533,820	711.60	62,790	676.40	22,030	616.10
69.....	629,940	718.00	545,180	725.10	63,610	685.70	20,640	634.10
70–74.....	3,007,850	729.90	2,647,960	738.10	267,840	677.50	83,960	647.70
70.....	619,580	719.80	542,270	727.40	57,030	679.00	19,470	631.60
71.....	620,120	720.20	545,460	728.40	55,040	671.80	18,690	628.80
72.....	589,340	726.70	517,390	735.20	53,480	672.80	16,630	649.20
73.....	592,110	736.50	523,090	744.60	51,540	680.00	15,100	663.10
74.....	586,700	747.30	519,750	755.80	50,750	684.30	14,070	677.00
75–79.....	2,614,010	768.30	2,335,670	777.80	211,970	687.20	54,170	683.80
75.....	557,450	751.90	496,180	760.20	46,910	685.90	11,850	674.00
76.....	548,260	766.90	488,540	776.20	45,070	692.50	12,220	680.00
77.....	538,020	766.50	481,080	776.30	43,500	680.70	10,870	687.10
78.....	499,810	774.30	448,390	784.20	39,130	686.70	10,140	683.30
79.....	470,470	784.90	421,480	795.20	37,360	690.80	9,090	698.50
80–84.....	1,939,570	830.10	1,750,200	842.40	148,050	710.30	31,360	716.20
80.....	464,810	795.80	419,030	807.30	35,210	686.20	8,300	688.50
81.....	418,430	810.20	377,510	821.70	32,070	703.30	6,660	676.70
82.....	372,010	825.70	334,040	838.50	29,880	705.10	6,000	713.60
83.....	361,400	859.70	327,450	872.50	26,680	729.90	5,480	733.60
84.....	322,920	877.30	292,170	890.10	24,210	739.70	4,920	800.50
85–89.....	1,179,900	900.70	1,066,320	914.50	92,340	754.00	15,930	804.50
85.....	293,310	921.70	264,870	934.70	23,120	782.70	4,030	848.00
86.....	264,750	907.50	240,210	921.40	19,410	759.60	3,850	787.70
87.....	240,270	902.70	217,170	917.90	18,890	737.60	3,120	799.30
88.....	205,400	885.80	185,430	899.20	16,240	745.90	2,830	804.30
89.....	176,170	869.80	158,640	883.80	14,680	731.40	2,100	759.50
90–94.....	499,770	853.10	451,800	868.80	41,280	694.80	5,250	737.60
95 or older.....	148,960	795.20	131,370	816.00	15,590	628.20	1,630	699.60

a. Includes 70,350 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).

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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.

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Table 5.A1.2—Number and average monthly benefit for disabled workers, by race, age, and sex, December 2001

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 disabled workers</b>								
Total .....	5,265,190	814.90	3,851,540	839.50	904,290	757.80	471,950	726.90
Under 20 .....	1,790	353.10	1,230	363.30	350	319.30	210	349.70
20–24 .....	41,970	450.90	28,480	456.60	8,300	432.40	5,190	448.90
20 .....	3,050	369.10	2,160	365.60	520	352.30	370	413.80
21 .....	5,930	405.90	3,960	416.70	1,270	358.90	700	429.80
22 .....	8,720	432.30	6,030	437.20	1,710	416.60	980	429.40
23 .....	10,610	467.00	7,080	475.90	2,270	447.10	1,260	453.00
24 .....	13,660	487.90	9,250	492.90	2,530	483.10	1,880	470.20
25–29 .....	105,270	534.90	69,120	548.90	20,370	518.80	15,430	493.90
25 .....	15,820	497.80	10,700	506.30	2,890	486.30	2,220	470.70
26 .....	18,260	518.70	12,290	527.70	3,230	505.80	2,730	493.00
27 .....	20,970	533.30	13,350	551.10	4,530	519.00	3,060	477.40
28 .....	22,510	544.30	14,500	561.60	4,520	526.90	3,420	495.80
29 .....	27,710	560.50	18,280	576.30	5,200	537.70	4,000	518.60
30–34 .....	209,930	613.30	141,490	626.00	37,500	589.10	28,740	584.50
30 .....	32,430	581.20	21,730	595.70	5,690	567.40	4,810	535.30
31 .....	38,340	594.90	25,970	606.90	6,560	571.90	5,370	568.70
32 .....	41,740	608.70	28,260	623.80	7,350	581.40	5,710	569.50
33 .....	47,020	624.30	31,740	633.40	8,600	608.10	6,180	602.30
34 .....	50,400	641.30	33,790	654.90	9,300	603.10	6,670	628.90
35–39 .....	376,290	677.20	261,300	694.40	67,630	631.40	43,540	647.80
35 .....	57,410	652.60	39,110	671.20	10,330	615.70	7,250	613.70
36 .....	68,210	662.10	46,860	676.40	12,340	624.70	8,210	635.60
37 .....	76,560	681.50	53,290	699.20	14,000	636.40	8,590	648.00
38 .....	82,750	686.00	57,640	704.30	14,780	635.10	9,540	657.20
39 .....	91,360	692.20	64,400	708.80	16,180	639.00	9,950	673.60
40–44 .....	582,460	738.50	412,270	756.70	107,730	686.10	56,930	709.80
40 .....	99,420	712.60	71,000	730.90	17,920	659.00	9,440	685.20
41 .....	108,450	724.70	77,060	743.90	19,680	665.90	10,560	701.20
42 .....	118,370	738.70	83,080	757.90	22,190	681.10	12,110	712.90
43 .....	123,070	746.30	87,010	762.10	23,070	700.20	11,920	724.80
44 .....	133,150	761.70	94,120	780.40	24,870	712.90	12,900	718.30
45–49 .....	745,830	798.90	528,830	820.60	137,950	745.30	71,850	742.40
45 .....	140,560	779.10	98,280	803.70	26,990	715.30	14,120	730.00
46 .....	144,630	787.80	102,270	810.20	27,350	735.30	13,650	731.90
47 .....	148,630	797.70	105,580	820.40	26,820	743.10	14,630	735.80
48 .....	151,840	811.90	107,420	832.00	28,410	761.90	14,470	758.30
49 .....	160,170	814.90	115,280	833.90	28,380	768.90	14,980	754.60
50–54 .....	929,730	849.40	666,340	867.00	165,890	810.70	86,640	785.50
50 .....	166,910	832.20	118,770	849.90	30,690	790.40	15,550	776.60
51 .....	171,840	835.80	120,870	855.40	32,440	797.80	16,510	765.10
52 .....	185,120	846.20	131,370	862.30	34,060	815.30	17,420	778.50
53 .....	194,470	859.50	139,570	876.30	33,930	822.80	18,350	799.10
54 .....	211,390	867.50	155,760	884.60	34,770	824.10	18,810	803.90
55–59 .....	1,092,250	882.60	824,840	905.00	176,970	830.40	85,840	777.80
55 .....	208,030	874.80	154,640	895.40	33,510	829.50	18,490	787.00
56 .....	197,790	872.60	145,460	894.60	34,400	830.10	16,970	773.60
57 .....	213,610	885.70	162,160	907.50	34,740	832.40	15,940	784.50
58 .....	234,590	886.50	179,430	909.10	37,390	831.60	17,090	770.30
59 .....	238,230	891.20	183,150	915.30	36,930	828.40	17,350	773.20
60–64 .....	1,179,670	891.30	917,640	917.30	181,600	815.30	77,580	766.70
60 .....	234,100	889.30	179,180	913.70	36,900	823.80	17,410	780.40
61 .....	237,060	891.90	184,090	917.80	36,670	816.30	15,890	769.40
62 .....	239,280	895.60	185,690	921.60	37,280	821.60	15,630	769.30
63 .....	238,840	893.40	187,880	918.00	35,940	822.70	14,480	756.80
64 .....	230,390	886.30	180,800	915.50	34,810	790.70	14,170	754.10
<b>Men</b>								
Subtotal .....	2,951,850	913.80	2,186,280	949.40	480,440	817.60	261,950	801.60
Under 20 .....	980	354.70	690	357.30	150	329.90	140	368.40
20–24 .....	24,860	462.40	16,970	467.90	4,690	441.20	3,200	464.30
20 .....	1,860	375.30	1,390	376.60	260	335.80	210	415.20
21 .....	3,700	417.20	2,550	420.60	700	370.30	450	471.20
22 .....	5,140	444.60	3,510	448.90	1,060	423.90	570	456.60
23 .....	6,230	476.30	4,260	481.70	1,140	463.70	830	465.50
24 .....	7,930	504.70	5,260	516.60	1,530	486.90	1,140	473.60
25–29 .....	59,600	544.50	38,980	559.90	11,540	521.80	8,880	505.50
25 .....	9,000	511.70	6,070	524.30	1,560	506.50	1,360	458.70
26 .....	10,720	525.20	7,050	537.80	2,050	498.10	1,620	504.90
27 .....	11,710	544.00	7,570	560.30	2,510	522.90	1,600	501.20
28 .....	12,360	556.70	7,840	572.30	2,540	539.60	1,920	518.50
29 .....	15,810	566.90	10,450	586.10	2,880	530.50	2,380	525.10

See footnotes at end of table.

5.A OASDI Current-Pay Benefits

Table 5.A1.2—Number and average monthly benefit for disabled workers, by race, age, and sex, December 2001—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>Men—Continued</b>								
30–34	118,360	625.40	78,500	640.70	21,120	596.20	17,240	595.10
30	17,960	603.60	11,840	621.30	3,080	577.70	2,900	561.90
31	21,250	606.30	14,180	622.00	3,540	579.50	3,220	572.80
32	24,090	617.80	16,180	632.00	4,170	593.50	3,480	582.60
33	26,250	633.00	17,250	644.00	4,900	614.20	3,730	610.10
34	28,810	652.40	19,050	671.10	5,430	603.40	3,910	634.70
35–39	211,920	695.60	145,630	716.90	38,470	638.10	25,480	664.20
35	32,090	666.10	21,570	690.10	5,700	614.70	4,350	624.30
36	38,350	677.80	25,790	697.20	7,130	627.30	4,960	646.20
37	43,320	698.90	30,020	722.00	7,950	644.80	4,990	648.50
38	46,540	706.30	31,790	726.30	8,680	648.80	5,550	685.30
39	51,620	714.90	36,460	734.50	9,010	645.20	5,630	703.90
40–44	326,770	776.60	230,700	801.70	59,960	704.50	32,640	739.90
40	56,090	740.30	40,000	764.60	10,020	670.80	5,360	703.70
41	60,460	756.40	42,950	781.10	10,850	684.20	5,960	721.50
42	67,130	776.90	46,740	806.10	12,630	695.00	7,180	735.40
43	68,770	787.60	48,600	806.60	12,690	729.10	6,800	767.40
44	74,320	809.90	52,410	838.20	13,770	731.00	7,340	760.10
45–49	412,250	866.00	294,400	896.40	74,090	779.60	39,590	806.40
45	79,130	832.60	54,840	868.40	15,430	738.80	8,140	771.80
46	80,050	850.60	56,840	880.60	15,020	770.40	7,430	794.30
47	81,860	862.60	58,620	892.80	14,360	778.80	7,800	799.70
48	83,080	885.30	59,550	912.90	14,820	800.60	7,890	835.00
49	88,130	894.80	64,550	921.90	14,460	811.70	8,330	830.10
50–54	513,250	951.10	371,160	977.50	87,330	875.70	47,900	886.70
50	92,010	920.80	65,830	946.60	16,420	845.20	8,650	865.80
51	95,290	924.50	68,160	950.60	17,040	849.30	8,750	870.90
52	102,030	944.70	72,970	971.00	17,960	875.50	9,720	874.70
53	107,340	970.40	77,720	996.70	17,570	898.60	10,310	903.10
54	116,580	984.40	86,480	1,010.60	18,340	906.00	10,470	912.00
55–59	604,830	1,027.30	466,170	1,059.10	90,770	928.40	44,880	904.10
55	115,080	1,002.70	86,830	1,033.10	17,330	909.40	10,060	903.80
56	109,450	1,009.90	81,680	1,044.20	17,980	917.10	9,160	892.60
57	118,480	1,029.80	92,060	1,059.10	17,560	937.40	8,370	912.10
58	129,030	1,039.60	101,210	1,070.40	18,840	938.00	8,490	903.20
59	132,790	1,049.00	104,390	1,081.50	19,060	938.50	8,800	909.90
60–64	679,030	1,047.60	543,080	1,078.10	92,320	940.10	42,000	896.60
60	132,340	1,045.00	103,910	1,076.00	18,590	942.90	9,500	909.00
61	135,020	1,051.20	107,740	1,081.10	18,600	944.20	8,470	911.20
62	138,080	1,053.50	110,100	1,084.10	19,240	943.80	8,350	910.10
63	137,770	1,050.60	111,520	1,079.40	18,090	952.10	7,850	875.50
64	135,820	1,037.60	109,810	1,069.70	17,800	916.80	7,830	872.60
<b>Women</b>								
Subtotal	2,313,340	688.70	1,665,260	695.20	423,850	690.00	210,000	633.80
Under 20	810	351.10	540	371.00	200	311.30	70	312.10
20–24	17,110	434.00	11,510	439.90	3,610	420.80	1,990	424.00
20	1,190	359.60	770	345.60	260	368.80	160	411.90
21	2,230	387.10	1,410	409.70	570	344.90	250	355.40
22	3,580	414.60	2,520	420.90	650	404.70	410	391.70
23	4,380	453.90	2,820	467.10	1,130	430.40	430	428.90
24	5,730	464.70	3,990	461.50	1,000	477.40	740	465.00
25–29	45,670	522.50	30,140	534.50	8,830	514.80	6,550	478.20
25	6,820	479.60	4,630	482.60	1,330	462.60	860	489.70
26	7,540	509.50	5,240	514.10	1,180	519.30	1,110	475.60
27	9,260	519.70	5,780	539.00	2,020	514.20	1,460	451.20
28	10,150	529.20	6,660	549.00	1,980	510.50	1,500	466.70
29	11,900	551.80	7,830	563.30	2,320	546.80	1,620	509.00
30–34	91,570	597.60	62,990	607.60	16,380	580.00	11,500	568.60
30	14,470	553.50	9,890	565.10	2,610	555.20	1,910	494.90
31	17,090	580.80	11,790	588.70	3,020	563.00	2,150	562.50
32	17,650	596.30	12,080	612.80	3,180	565.50	2,230	549.10
33	20,770	613.30	14,490	620.90	3,700	600.00	2,450	590.50
34	21,590	626.50	14,740	633.90	3,870	602.70	2,760	620.60
35–39	164,370	653.30	115,670	666.00	29,160	622.70	18,060	624.70
35	25,320	635.60	17,540	648.10	4,630	616.90	2,900	597.70
36	29,860	641.90	21,070	651.00	5,210	621.20	3,250	619.60
37	33,240	658.80	23,270	669.80	6,050	625.40	3,600	647.20
38	36,210	660.00	25,850	677.20	6,100	615.70	3,990	618.10
39	39,740	662.60	27,940	675.10	7,170	631.20	4,320	634.10

See footnotes at end of table.



Table 5.A1.2—Number and average monthly benefit for disabled workers, by race, age, and sex, December 2001—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>Women—Continued</b>								
40–44 .....	255,690	689.90	181,570	699.50	47,770	663.00	24,290	669.50
40 .....	43,330	676.80	31,000	687.40	7,900	644.00	4,080	661.00
41 .....	47,990	684.80	34,110	697.00	8,830	643.30	4,600	674.80
42 .....	51,240	688.70	36,340	695.90	9,560	662.70	4,930	680.00
43 .....	54,300	694.10	38,410	705.80	10,380	664.90	5,120	668.20
44 .....	58,830	700.80	41,710	707.80	11,100	690.50	5,560	663.20
45–49 .....	333,580	715.90	234,430	725.50	63,860	705.50	32,260	663.80
45 .....	61,430	710.20	43,440	721.90	11,560	683.90	5,980	673.20
46 .....	64,580	709.90	45,430	722.00	12,330	692.40	6,220	657.40
47 .....	66,770	718.20	46,960	730.20	12,460	701.90	6,830	662.80
48 .....	68,760	723.20	47,870	731.20	13,590	719.80	6,580	666.30
49 .....	72,040	717.10	50,730	722.00	13,920	724.50	6,650	660.10
50–54 .....	416,480	724.10	295,180	728.00	78,560	738.30	38,740	660.40
50 .....	74,900	723.40	52,940	729.70	14,270	727.40	6,900	664.80
51 .....	76,550	725.40	52,710	732.40	15,400	740.90	7,760	645.70
52 .....	83,090	725.10	58,400	726.60	16,100	748.10	7,700	657.10
53 .....	87,130	723.00	61,850	724.90	16,360	741.30	8,040	665.80
54 .....	94,810	723.70	69,280	727.30	16,430	732.70	8,340	668.20
55–59 .....	487,420	703.10	358,670	704.80	86,200	727.20	40,960	639.30
55 .....	92,950	716.50	67,810	719.00	16,180	743.90	8,430	647.70
56 .....	88,340	702.50	63,780	703.00	16,420	735.00	7,810	633.90
57 .....	95,130	706.20	70,100	708.50	17,180	725.10	7,570	643.40
58 .....	105,560	699.40	78,220	700.40	18,550	723.50	8,600	639.10
59 .....	105,440	692.60	78,760	695.10	17,870	710.90	8,550	632.50
60–64 .....	500,640	679.30	374,560	684.30	89,280	686.10	35,580	613.40
60 .....	101,760	686.80	75,270	689.60	18,310	702.80	7,910	626.00
61 .....	102,040	680.90	76,350	687.40	18,070	684.70	7,420	607.50
62 .....	101,200	680.00	75,590	684.80	18,040	691.20	7,280	607.80
63 .....	101,070	679.20	76,360	682.20	17,850	691.50	6,630	616.30
64 .....	94,570	668.90	70,990	677.00	17,010	658.70	6,340	607.80

a. Includes 37,410 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).

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits

Table 5.A1.3—Number and average monthly benefit for spouses, by race, sex, basis of entitlement, age, and marital status, December 2001

Basis of entitlement, age, 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>All spouses</b>								
Total .....	2,895,150	430.40	2,618,330	441.90	150,480	340.70	117,180	292.20
<b>Wives</b>								
Subtotal .....	2,858,180	432.80	2,594,670	443.70	145,640	343.60	108,980	297.90
Entitlement based on care of children.....	158,030	232.00	117,360	247.50	21,110	208.60	18,750	163.90
Under 35 .....	21,580	130.80	15,080	138.90	2,970	110.10	3,380	113.00
35-39 .....	25,870	161.10	18,890	169.00	3,220	152.80	3,650	129.60
40-44 .....	32,180	209.20	23,500	221.00	4,370	194.80	4,070	160.50
45-49 .....	29,000	247.20	21,220	263.00	4,320	218.60	3,350	183.50
50-54 .....	21,120	283.80	15,930	299.20	2,680	262.50	2,380	207.80
55-59 .....	15,330	321.10	12,000	337.10	2,000	284.70	1,280	230.30
60-61 .....	5,680	356.50	4,550	371.10	820	326.20	300	226.80
62-64 .....	7,270	389.40	6,190	401.50	730	339.20	340	274.60
Entitlement based on age .....	2,700,150	444.60	2,477,310	453.00	124,530	366.50	90,230	325.70
62-64 .....	319,500	404.20	287,260	414.40	17,120	332.80	14,790	292.50
62 .....	79,620	393.20	71,690	402.00	4,070	319.70	3,740	305.50
63 .....	113,880	401.00	102,400	411.20	6,080	335.90	5,340	281.80
64 .....	126,000	414.10	113,170	425.10	6,970	337.60	5,710	294.00
65-69 .....	742,020	443.90	669,420	454.70	39,090	363.70	32,000	322.60
65 .....	145,790	439.50	130,900	450.60	7,510	359.50	7,170	326.50
66 .....	150,490	442.40	134,560	454.00	8,410	361.00	7,200	326.50
67 .....	150,780	443.80	135,930	454.00	8,350	377.30	6,170	315.40
68 .....	145,430	446.30	131,560	457.80	7,290	352.30	6,320	320.30
69 .....	149,530	447.50	136,470	457.00	7,530	366.70	5,140	323.00
70-74 .....	713,970	447.80	657,000	455.60	32,780	376.40	21,790	325.40
70 .....	148,720	449.20	136,680	457.30	6,730	381.10	4,860	318.80
71 .....	151,050	447.40	138,370	455.80	7,260	377.80	5,000	322.20
72 .....	140,850	447.50	129,500	456.10	6,400	366.10	4,520	325.20
73 .....	138,630	446.00	127,420	453.50	6,570	374.60	4,070	328.60
74 .....	134,720	449.00	125,030	455.30	5,820	382.30	3,340	336.30
75-79 .....	531,820	445.50	493,950	451.80	21,680	371.60	14,040	340.10
75 .....	123,000	446.70	113,600	454.20	5,500	369.20	3,430	327.00
76 .....	115,830	445.40	106,940	451.90	5,110	376.60	3,330	346.60
77 .....	107,560	441.10	100,630	446.10	4,040	377.40	2,470	339.80
78 .....	96,880	447.90	90,070	454.00	3,870	372.20	2,450	350.50
79 .....	88,550	446.80	82,710	453.00	3,160	359.40	2,360	339.40
80-84 .....	280,350	464.70	264,000	469.70	9,450	378.40	5,660	372.50
85-89 .....	92,880	490.80	87,370	496.20	3,480	396.70	1,620	390.40
90-94 .....	17,880	479.90	16,740	485.00	800	397.00	300	411.20
95 or older .....	1,730	456.20	1,570	458.10	130	454.90	30	358.70
<b>Husbands</b>								
Subtotal .....	36,970	242.20	23,660	249.00	4,840	252.30	8,200	216.70
Under 62 .....	2,110	140.20	1,470	134.60	290	176.90	350	132.90
62-64 .....	1,670	206.70	1,130	189.80	260	220.70	280	262.00
65-69 .....	8,070	244.30	5,070	250.10	1,080	250.80	1,910	224.80
70-74 .....	10,170	256.40	6,250	261.70	1,390	278.30	2,510	231.60
75-79 .....	7,640	239.10	4,830	252.10	870	253.10	1,810	195.60
80-84 .....	3,940	251.50	2,390	271.30	600	252.90	910	204.10
85-89 .....	2,370	268.90	1,810	274.60	230	260.50	290	243.80
90 or older .....	1,000	278.60	710	297.50	120	189.20	140	257.60

See footnotes at end of table.

Table 5.A1.3—Number and average monthly benefit for spouses, by race, sex, basis of entitlement, age, and marital status, December 2001—Continued

Basis of entitlement, age, 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>All spouses of retired workers</b>								
Total .....	2,737,720	443.30	2,499,230	452.70	131,000	363.80	99,140	315.10
<b>Wives</b>								
Subtotal .....	2,704,820	445.60	2,478,250	454.30	126,860	367.20	91,610	322.80
<b>By basis of entitlement</b>								
Entitlement based on care of children.....	54,280	347.10	42,620	364.60	6,980	314.90	4,510	235.60
Under 35 .....	1,810	284.60	1,350	301.40	240	248.30	200	231.30
35-39 .....	3,880	278.70	2,880	291.00	640	276.00	360	184.70
40-44 .....	7,360	327.50	5,530	343.00	1,160	308.70	650	235.30
45-49 .....	9,870	343.50	7,720	361.80	1,300	309.70	820	225.70
50-54 .....	10,000	345.50	7,780	363.00	1,070	327.70	1,110	244.40
55-59 .....	9,830	358.10	7,750	378.30	1,220	309.50	810	242.80
60-61 .....	4,740	374.10	3,820	387.90	680	347.40	240	229.80
62-64 .....	6,790	397.00	5,790	408.60	670	352.70	320	277.20
Entitlement based on age .....	2,650,540	447.60	2,435,630	455.90	119,880	370.30	87,100	327.30
62-64 .....	290,720	416.60	262,150	427.10	15,060	342.50	13,220	295.60
62 .....	68,640	411.90	61,890	421.60	3,470	334.50	3,190	310.90
63 .....	103,450	414.10	93,290	424.90	5,330	343.30	4,770	283.10
64 .....	118,630	421.60	106,970	432.30	6,260	346.30	5,260	297.60
65-69 .....	726,170	447.40	656,680	457.90	37,250	368.40	30,800	323.60
65 .....	140,620	445.20	126,620	456.20	7,010	364.30	6,780	328.00
66 .....	146,390	446.90	131,390	458.00	7,870	370.50	6,860	327.00
67 .....	148,020	446.60	133,780	456.50	8,000	379.90	5,920	318.10
68 .....	143,170	448.70	129,680	460.10	7,050	355.90	6,180	320.50
69 .....	147,970	449.40	135,210	458.70	7,320	369.30	5,060	323.30
70-74 .....	710,140	448.70	654,060	456.40	32,220	377.60	21,500	325.60
70 .....	147,650	450.20	135,820	458.30	6,610	383.00	4,790	318.70
71 .....	150,070	448.50	137,630	456.80	7,140	379.40	4,890	323.00
72 .....	140,150	448.30	128,960	456.90	6,270	366.60	4,490	325.20
73 .....	138,040	446.50	126,990	454.00	6,460	376.00	4,020	328.50
74 .....	134,230	449.60	124,660	455.80	5,740	382.70	3,310	336.50
75-79 .....	530,860	445.80	493,170	452.00	21,560	372.40	13,980	340.40
75 .....	122,630	447.10	113,310	454.50	5,450	370.30	3,400	327.00
76 .....	115,630	445.80	106,780	452.20	5,100	377.20	3,300	348.00
77 .....	107,300	441.40	100,400	446.40	4,010	378.20	2,470	339.80
78 .....	96,790	448.10	90,000	454.10	3,850	372.80	2,450	350.50
79 .....	88,510	446.90	82,680	453.10	3,150	360.50	2,360	339.40
80-84 .....	280,190	464.80	263,910	469.80	9,390	379.20	5,650	372.60
85-89 .....	92,850	490.90	87,350	496.30	3,470	396.60	1,620	390.40
90-94 .....	17,880	479.90	16,740	485.00	800	397.00	300	411.20
95 or older .....	1,730	456.20	1,570	458.10	130	454.90	30	358.70
<b>By marital status</b>								
Nondivorced wives.....	2,582,870	445.90	2,373,460	454.40	114,290	365.70	87,410	320.80
Divorced wives.....	121,950	440.50	104,790	450.70	12,570	380.80	4,200	364.30
<b>Husbands</b>								
Subtotal .....	32,900	251.60	20,980	260.80	4,140	260.00	7,530	221.70

See footnotes at end of table.

5.A OASDI Current-Pay Benefits

Table 5.A1.3—Number and average monthly benefit for spouses, by race, sex, basis of entitlement, age, and marital status, December 2001—Continued

Basis of entitlement, age, 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>All spouses of disabled workers</b>								
Total .....	157,430	206.50	119,100	216.30	19,480	184.80	18,040	166.40
<b>Wives</b>								
Subtotal .....	153,360	207.60	116,420	217.70	18,780	184.00	17,370	166.60
<b>By basis of entitlement</b>								
Entitlement based on care of children.....	103,750	171.80	74,740	180.80	14,130	156.10	14,240	141.20
Under 35 .....	19,770	116.70	13,730	123.00	2,730	98.00	3,180	105.60
35-39 .....	21,990	140.40	16,010	147.00	2,580	122.20	3,290	123.60
40-44 .....	24,820	174.20	17,970	183.50	3,210	153.70	3,420	146.30
45-49 .....	19,130	197.50	13,500	206.60	3,020	179.40	2,530	169.80
50-54 .....	11,120	228.30	8,150	238.30	1,610	219.20	1,270	175.80
55-59 .....	5,500	255.10	4,250	261.90	780	245.90	470	208.70
60-61 .....	940	267.80	730	283.00	140	223.00	60	214.80
62-64 .....	480	282.20	400	298.70	60	188.20	20	233.50
Entitlement based on age .....	49,610	282.40	41,680	284.00	4,650	268.90	3,130	282.20
62-64 .....	28,780	279.00	25,110	281.40	2,060	261.50	1,570	266.70
62 .....	10,980	275.80	9,800	278.70	600	234.10	550	274.10
63 .....	10,430	271.60	9,110	270.60	750	283.60	570	271.00
64 .....	7,370	294.40	6,200	301.60	710	261.30	450	252.20
65-69 .....	15,850	285.40	12,740	287.10	1,840	268.30	1,200	266.40
65 .....	5,170	286.10	4,280	284.10	500	292.00	390	300.80
66 .....	4,100	279.20	3,170	285.70	540	221.70	340	317.10
67 .....	2,760	295.00	2,150	297.10	350	316.40	250	251.10
68 .....	2,260	293.40	1,880	298.00	240	247.00	140	311.40
69 .....	1,560	270.80	1,260	267.60	210	276.00	80	302.00
70-74 .....	3,830	293.20	2,940	287.10	560	307.30	290	309.80
70 .....	1,070	306.40	860	303.70	120	280.50	70	325.30
71 .....	980	271.20	740	269.80	120	281.80	110	284.10
72 .....	700	284.40	540	268.20	130	341.20	30	329.70
73 .....	590	315.20	430	319.90	110	287.60	50	335.40
74 .....	490	294.30	370	272.50	80	357.60	30	305.20
75 or older .....	1,150	291.50	890	303.80	190	241.40	70	271.40
<b>By marital status</b>								
Nondivorced wives.....	148,500	205.40	112,660	215.80	18,090	180.40	17,000	164.40
Divorced wives.....	4,860	274.70	3,760	274.30	690	279.50	370	267.00
<b>Husbands</b>								
Subtotal .....	4,070	166.10	2,680	156.40	700	207.00	670	160.70

a. Includes 9,160 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).

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.A1.4—Number and average monthly benefit for children, by type of benefit, race, and age, December 2001

Age and 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)
<b>All children</b>								
Total .....	3,847,330	422.50	2,607,650	452.40	833,070	371.70	375,790	325.40
Under age 18 .....	2,997,450	390.70	1,945,490	417.50	680,030	349.90	344,330	316.70
Under 1 .....	10,110	304.60	6,650	323.70	2,030	273.50	1,410	259.50
1 .....	23,840	290.50	14,860	308.70	5,550	268.00	3,340	248.20
2 .....	36,690	308.90	23,230	324.80	8,220	276.70	5,090	290.80
3 .....	49,350	321.00	31,290	343.40	10,770	287.20	7,080	276.80
4 .....	64,090	321.70	40,450	343.10	14,640	291.00	8,760	277.70
5 .....	77,420	330.70	49,390	350.10	17,460	300.80	10,320	291.20
6 .....	93,700	333.90	59,410	354.30	21,410	299.10	12,530	299.70
7 .....	115,740	344.40	73,390	368.90	27,110	308.00	14,560	290.80
8 .....	137,970	347.60	86,510	370.30	33,560	315.40	17,020	298.10
9 .....	162,800	353.30	102,970	380.00	38,190	313.90	20,410	294.20
10 .....	189,580	356.10	118,900	380.60	45,500	324.30	23,340	294.10
11 .....	218,080	371.90	137,790	397.50	51,730	335.70	26,330	306.90
12 .....	240,620	377.70	154,780	402.80	55,950	342.50	27,490	304.00
13 .....	266,290	389.90	173,300	416.90	60,770	348.70	29,100	312.40
14 .....	285,490	402.90	185,760	429.10	64,780	364.60	31,690	322.50
15 .....	311,950	420.10	207,620	447.50	68,430	376.30	32,890	333.10
16 .....	342,480	443.10	227,960	473.00	75,530	392.10	35,170	352.00
17 .....	371,250	457.40	251,230	484.20	78,400	411.60	37,800	369.00
Disabled adult children .....	741,870	537.80	587,090	557.30	129,580	470.40	23,170	420.40
18-19 .....	12,780	434.80	8,640	467.00	3,100	387.30	900	305.20
20-24 .....	56,070	458.90	36,400	477.50	15,280	432.80	3,900	379.50
25-29 .....	62,780	502.90	43,780	524.80	15,350	462.60	3,310	387.60
30-34 .....	77,420	530.20	56,950	547.00	17,000	491.10	3,190	439.50
35-39 .....	102,010	544.70	77,510	565.80	20,680	486.90	3,640	427.80
40-44 .....	109,610	558.70	87,480	578.80	19,310	483.10	2,630	444.60
45-49 .....	94,310	568.00	77,020	588.40	14,850	481.50	2,270	438.70
50-54 .....	72,710	574.50	62,140	590.40	9,140	481.70	1,320	470.10
55-59 .....	52,530	569.50	45,970	583.30	5,860	468.30	660	489.70
60-64 .....	36,710	561.80	32,320	573.40	3,640	473.60	690	474.90
65-69 .....	25,500	527.70	22,760	538.20	2,480	435.60	240	483.40
70-74 .....	18,940	500.60	17,190	507.50	1,500	426.10	240	482.50
75-79 .....	11,870	475.00	10,960	480.80	790	401.70	120	424.50
80 or older .....	8,630	445.00	7,970	449.60	600	385.00	60	423.50
Students, aged 18-19 .....	108,010	512.50	75,070	538.30	23,460	456.20	8,290	424.90
18 .....	103,430	512.60	72,360	538.30	22,000	454.10	7,900	425.00
19 .....	4,580	510.60	2,710	536.40	1,460	487.80	390	422.90
<b>Children of retired workers</b>								
Subtotal .....	466,630	413.60	343,710	437.70	93,010	364.10	28,920	289.70
Under age 18 .....	261,260	382.50	173,360	407.60	65,550	354.10	21,810	272.10
Under 1 .....	470	372.80	330	383.90	110	359.50	30	298.70
1 .....	1,300	367.40	810	386.30	360	350.70	130	296.20
2 .....	1,700	355.20	1,160	362.10	440	351.10	100	293.50
3 .....	2,900	338.80	1,760	358.40	810	323.50	330	271.80
4 .....	3,900	334.40	2,440	358.70	1,070	324.50	370	213.80
5 .....	4,950	354.30	3,110	366.20	1,440	352.90	380	275.50
6 .....	5,550	356.40	3,200	373.70	1,820	356.70	530	250.80
7 .....	7,840	359.90	4,920	370.80	2,290	369.10	610	241.80
8 .....	9,130	345.40	5,860	361.40	2,530	340.10	720	240.70
9 .....	12,590	348.10	7,840	373.20	3,630	330.50	1,110	230.60
10 .....	13,920	350.10	9,070	373.40	3,790	329.90	1,000	224.60
11 .....	17,310	364.50	10,990	390.40	4,860	334.60	1,410	268.10
12 .....	20,400	359.40	13,440	378.10	5,450	346.00	1,470	237.90
13 .....	23,730	368.00	15,780	391.00	5,860	344.40	2,030	259.40
14 .....	26,660	373.80	18,030	394.90	6,350	355.30	2,210	254.90
15 .....	30,950	385.70	20,620	408.70	7,760	358.40	2,520	283.70
16 .....	35,700	421.60	24,410	454.70	8,050	372.00	3,170	297.70
17 .....	42,260	428.50	29,590	456.70	8,930	381.80	3,690	318.20

See footnotes at end of table.

5.A OASDI Current-Pay Benefits

Table 5.A1.4—Number and average monthly benefit for children, by type of benefit, race, and age, December 2001—Continued

Age and 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)
<b>Children of retired workers—Continued</b>								
Disabled adult children.....	192,450	451.50	160,670	466.60	24,850	382.60	6,490	342.80
18–19.....	1,980	373.60	1,320	418.50	480	303.80	160	246.00
20–24.....	9,410	394.40	6,660	415.00	2,140	352.90	580	301.90
25–29.....	15,330	430.20	11,920	447.00	2,530	388.70	830	320.40
30–34.....	25,500	446.10	21,060	461.50	3,240	368.10	1,150	391.30
35–39.....	40,660	464.10	33,710	479.00	5,510	403.30	1,370	343.70
40–44.....	43,630	466.80	37,420	481.50	5,150	388.50	970	328.20
45–49.....	30,120	457.90	25,880	470.30	3,290	382.80	870	365.60
50–54.....	15,600	446.10	13,680	455.00	1,530	392.30	360	323.00
55–59.....	6,870	441.30	6,140	451.30	620	349.60	100	330.70
60–64.....	2,370	447.80	2,080	456.00	200	402.90	80	393.30
65–69.....	640	389.20	550	393.20	80	377.40	10	262.00
70 or older.....	340	393.40	250	437.30	80	260.80	10	355.00
Students, aged 18–19.....	12,920	477.60	9,680	496.90	2,610	437.20	620	352.90
18.....	12,460	479.00	9,350	498.40	2,490	440.20	610	346.70
19.....	460	437.70	330	451.70	120	374.70	10	730.00
<b>Children of deceased workers</b>								
Subtotal.....	1,890,280	569.70	1,273,400	613.60	431,100	480.50	167,180	466.20
Under age 18.....	1,343,590	557.40	849,090	609.40	327,050	467.30	150,930	460.70
Under 1.....	2,710	557.40	1,660	644.70	620	406.60	430	437.60
1.....	6,170	508.20	3,610	572.00	1,540	430.20	1,020	400.20
2.....	11,910	522.30	6,980	577.50	2,990	423.70	1,940	475.40
3.....	17,540	524.20	10,560	587.40	4,240	419.10	2,730	441.90
4.....	23,550	513.50	14,200	572.70	5,860	416.70	3,480	436.00
5.....	30,260	519.80	18,510	572.40	7,320	429.90	4,420	447.80
6.....	37,590	516.50	22,760	569.00	9,550	416.60	5,230	472.40
7.....	48,110	520.70	29,460	578.60	12,270	418.50	6,190	449.90
8.....	59,620	517.30	35,670	570.80	15,810	432.60	7,730	446.70
9.....	71,290	520.60	43,840	577.70	17,770	421.00	8,980	444.30
10.....	84,140	521.00	50,420	574.90	22,360	439.40	10,430	439.60
11.....	98,740	538.10	60,240	591.80	25,270	452.70	11,900	449.60
12.....	109,570	542.40	68,160	595.20	27,300	457.80	12,540	441.10
13.....	122,560	556.20	77,650	608.90	29,980	466.50	12,950	455.70
14.....	133,400	565.00	84,450	615.50	32,440	480.00	14,330	461.60
15.....	146,610	583.90	96,590	630.50	33,650	495.40	14,390	477.00
16.....	163,010	593.00	106,850	641.70	38,330	500.10	15,260	483.40
17.....	176,810	601.70	117,480	644.80	39,750	520.30	16,980	494.40
Disabled adult children.....	490,050	595.50	385,450	616.30	91,050	518.90	12,370	505.50
18–19.....	5,940	576.60	4,050	616.30	1,540	498.60	290	451.80
20–24.....	27,060	583.40	16,640	616.50	8,410	532.40	1,720	506.00
25–29.....	32,070	613.50	21,180	648.40	9,290	546.90	1,400	506.10
30–34.....	40,960	626.60	28,070	659.20	11,330	558.50	1,380	523.70
35–39.....	54,910	622.40	39,220	658.90	13,790	533.50	1,830	509.40
40–44.....	64,120	625.50	48,710	657.60	13,730	522.90	1,580	517.80
45–49.....	63,960	620.50	51,010	648.80	11,460	511.60	1,400	484.20
50–54.....	57,070	609.80	48,420	628.80	7,610	499.70	960	525.30
55–59.....	45,660	588.70	39,830	603.60	5,240	482.30	560	518.10
60–64.....	34,340	569.70	30,240	581.50	3,440	477.80	610	485.60
65–69.....	24,860	531.20	22,210	541.80	2,400	437.50	230	493.00
70–74.....	18,730	502.00	17,050	508.10	1,440	432.90	230	488.00
75–79.....	11,790	475.30	10,890	481.00	780	403.70	120	424.50
80 or older.....	8,580	445.10	7,930	449.50	590	387.20	60	423.50
Students, aged 18–19.....	56,640	637.90	38,860	677.00	13,000	543.80	3,880	552.70
18.....	54,050	639.30	37,440	677.70	12,060	541.90	3,660	556.70
19.....	2,590	609.50	1,420	658.00	940	567.50	220	485.60

See footnotes at end of table.

Table 5.A1.4—Number and average monthly benefit for children, by type of benefit, race, and age, December 2001—Continued

Age and 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)
<b>Children of disabled workers</b>								
Subtotal .....	1,490,420	238.50	990,540	250.40	308,960	222.10	179,690	200.30
Under age 18 .....	1,392,600	231.30	923,040	242.80	287,430	215.50	171,590	195.60
Under 1 .....	6,930	201.10	4,660	205.10	1,300	202.70	950	177.60
1 .....	16,370	202.30	10,440	211.60	3,650	191.50	2,190	174.60
2 .....	23,080	195.30	15,090	205.00	4,790	178.10	3,050	173.30
3 .....	28,910	196.00	18,970	206.20	5,720	184.30	4,020	165.00
4 .....	36,640	197.00	23,810	204.60	7,710	190.90	4,910	170.30
5 .....	42,210	192.30	27,770	200.00	8,700	183.50	5,520	166.90
6 .....	50,560	195.70	33,450	206.50	10,040	176.90	6,770	170.20
7 .....	59,790	200.50	39,010	210.30	12,550	188.70	7,760	167.80
8 .....	69,220	201.80	44,980	212.40	15,220	189.50	8,570	168.90
9 .....	78,920	203.00	51,290	212.00	16,790	196.80	10,320	170.40
10 .....	91,520	205.40	59,410	216.70	19,350	190.10	11,910	172.50
11 .....	102,030	212.30	66,560	222.80	21,600	199.20	13,020	180.60
12 .....	110,650	218.00	73,180	228.30	23,200	205.90	13,480	183.50
13 .....	120,000	224.40	79,870	235.30	24,930	207.90	14,120	188.60
14 .....	125,430	236.70	83,280	247.40	25,990	222.80	15,150	200.70
15 .....	134,390	249.40	90,410	260.90	27,020	233.20	15,980	211.20
16 .....	143,770	278.60	96,700	291.30	29,150	255.70	16,740	242.50
17 .....	152,180	297.70	104,160	310.90	29,720	275.30	17,130	255.70
Disabled adult children .....	59,370	342.20	40,970	358.80	13,680	306.90	4,310	293.10
18-19 .....	4,860	286.30	3,270	301.60	1,080	265.50	450	231.90
20-24 .....	19,600	317.90	13,100	332.70	4,730	291.80	1,600	271.60
25-29 .....	15,380	344.70	10,680	366.40	3,530	293.80	1,080	285.50
30-34 .....	10,960	365.50	7,820	374.50	2,430	340.60	660	347.30
35-39 .....	6,440	391.30	4,580	406.30	1,380	354.70	440	350.10
40 or older .....	2,130	405.70	1,520	430.60	530	334.00	80	408.40
Students, aged 18-19 .....	38,450	339.50	26,530	350.20	7,850	317.40	3,790	306.00
18 .....	36,920	338.50	25,570	348.80	7,450	316.50	3,630	305.40
19 .....	1,530	365.10	960	385.60	400	334.40	160	317.60

a. Includes 30,820 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).

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

## 5.A OASDI Current-Pay Benefits

**Table 5.A1.5—Number and average monthly benefit for widowed mothers and fathers, by race, age, sex, and marital status, December 2001**

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 .....	195,160	618.50	137,460	661.00	32,320	528.00	23,200	494.20
	<i>By age</i>							
Under 20 .....	150	392.30	90	428.10	0	0	60	338.50
20–24 .....	2,550	458.70	1,800	474.10	270	388.50	480	440.30
20 .....	240	456.60	170	485.00	0	0	70	387.60
21 .....	270	434.10	220	450.10	10	85.00	40	433.30
22 .....	550	462.00	330	467.90	70	419.40	150	469.00
23 .....	720	479.10	490	503.70	120	410.30	110	444.20
24 .....	770	446.50	590	458.90	70	363.40	110	433.20
25–29 .....	9,690	500.00	6,420	534.20	1,600	414.30	1,610	450.70
25 .....	1,320	506.50	880	542.40	200	389.80	240	472.00
26 .....	1,640	492.10	1,140	527.90	220	377.00	280	436.60
27 .....	1,760	500.90	1,170	545.10	300	381.40	280	449.80
28 .....	2,210	534.20	1,620	570.40	310	449.70	270	415.00
29 .....	2,760	473.60	1,610	489.70	570	435.50	540	466.80
30–34 .....	22,300	535.60	15,320	573.70	3,420	437.20	3,340	465.90
30 .....	3,250	531.20	2,250	562.20	550	443.30	430	491.00
31 .....	4,100	512.60	2,850	547.60	520	428.80	690	438.00
32 .....	4,340	544.60	3,100	579.20	670	426.80	510	487.30
33 .....	4,800	528.50	3,250	571.50	740	444.60	760	430.80
34 .....	5,810	553.60	3,870	597.20	940	439.80	950	491.40
35–39 .....	38,160	573.90	26,700	619.70	6,070	475.80	4,990	454.40
35 .....	6,630	554.50	4,640	590.50	940	456.00	1,020	478.70
36 .....	6,580	550.00	4,480	596.00	1,040	474.50	960	423.00
37 .....	7,570	574.70	5,340	622.50	1,210	496.60	910	418.80
38 .....	8,120	580.40	5,540	629.00	1,490	461.90	1,030	493.90
39 .....	9,260	598.30	6,700	645.80	1,390	486.80	1,070	451.60
40–44 .....	44,520	637.90	31,820	684.10	6,930	535.20	5,270	496.20
40 .....	8,950	619.00	6,460	661.80	1,310	529.90	1,130	476.90
41 .....	8,790	632.60	6,250	675.80	1,310	543.80	1,100	497.30
42 .....	9,250	641.10	6,710	690.30	1,500	516.90	950	492.90
43 .....	8,890	649.30	6,280	696.40	1,430	540.60	1,040	521.40
44 .....	8,640	647.80	6,120	696.50	1,380	546.40	1,050	493.90
45–49 .....	35,830	676.40	25,440	718.30	5,790	581.50	4,060	547.40
45 .....	8,530	659.40	5,970	705.20	1,460	550.50	940	546.40
46 .....	7,920	677.60	5,720	720.80	1,230	584.00	900	521.10
47 .....	6,950	683.30	4,960	725.80	1,100	597.80	800	532.10
48 .....	6,640	686.20	4,670	729.40	1,090	589.30	770	561.20
49 .....	5,790	680.10	4,120	712.10	910	598.80	650	587.60
50–54 .....	20,690	676.00	14,350	716.70	3,890	598.80	2,120	539.40
50 .....	5,440	658.60	3,800	696.00	970	590.00	570	535.70
51 .....	4,440	659.30	2,950	709.50	840	576.60	570	525.10
52 .....	3,880	674.00	2,590	723.10	780	605.40	430	476.70
53 .....	3,390	692.20	2,400	723.40	640	609.60	310	616.20
54 .....	3,540	710.60	2,610	742.50	660	621.90	240	595.60
55–59 .....	11,200	672.60	8,270	703.50	2,130	591.00	720	556.50
55 .....	2,940	673.60	2,240	711.40	420	563.30	240	505.60
56 .....	2,230	674.10	1,550	723.40	490	557.40	180	597.00
57 .....	2,050	658.40	1,550	685.70	360	561.50	120	569.40
58 .....	1,930	691.80	1,420	710.90	410	629.70	100	675.20
59 .....	2,050	665.70	1,510	682.50	450	641.70	80	450.60
60–61 .....	3,880	675.10	2,760	720.10	890	576.40	200	494.90
60 .....	2,050	678.30	1,520	719.40	430	581.60	100	468.90
61 .....	1,830	671.60	1,240	720.90	460	571.50	100	520.90
62 or older .....	6,190	649.70	4,490	684.60	1,330	554.90	350	580.50
	<i>By sex and marital status</i>							
Widowed mothers .....	185,320	623.30	130,720	666.90	30,460	528.90	22,050	496.20
Mothers .....	167,630	624.60	116,960	670.60	28,110	527.20	20,590	497.10
Surviving divorced mothers .....	17,690	610.40	13,760	635.60	2,350	549.30	1,460	484.10
Widowed fathers .....	9,840	529.60	6,740	546.60	1,860	513.40	1,150	454.30

a. Includes 2,180 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).

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.



**Table 5.A1.6—Number and average monthly benefit for nondisabled widow(er)s, by race, age, sex, and marital status, December 2001**

Age 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)
Total, nondisabled widow(er)s .....	4,624,690	840.80	4,111,080	861.50	407,200	670.70	93,950	668.90
<b>Widows</b>								
Subtotal .....	4,586,220	842.50	4,080,840	863.10	400,970	671.70	92,050	671.10
<i>By age</i>								
60-61 .....	125,390	811.50	105,920	833.20	15,590	696.00	3,800	684.20
60 .....	50,390	818.60	42,840	839.50	5,950	699.10	1,550	705.20
61 .....	75,000	806.70	63,080	828.90	9,640	694.00	2,250	669.80
62-64 .....	309,270	808.60	262,170	832.60	36,540	681.70	10,100	649.20
62 .....	92,080	811.80	78,000	836.00	10,920	685.10	3,080	649.40
63 .....	106,130	805.80	90,190	830.10	12,350	672.20	3,430	649.00
64 .....	111,060	808.50	93,980	832.20	13,270	687.60	3,590	649.20
65-69 .....	672,810	845.30	577,160	871.20	76,180	691.50	17,710	672.40
65 .....	130,030	840.70	110,950	867.20	14,840	686.00	3,850	680.20
66 .....	133,030	845.20	113,880	870.50	15,430	697.50	3,450	685.10
67 .....	135,480	852.60	116,820	875.70	15,130	714.80	3,210	671.10
68 .....	132,720	844.40	114,240	871.60	14,870	680.10	3,230	649.70
69 .....	141,550	843.60	121,270	870.90	15,910	679.40	3,970	673.30
70-74 .....	770,290	844.70	673,840	868.40	76,920	682.00	17,050	656.80
70 .....	137,520	847.10	118,930	872.20	14,980	690.20	3,290	665.10
71 .....	148,950	846.00	130,150	869.30	14,950	690.20	3,340	648.60
72 .....	151,720	848.00	132,190	873.90	15,300	672.00	3,600	655.90
73 .....	160,480	843.70	141,230	866.30	15,700	682.40	3,100	639.00
74 .....	171,620	839.80	151,340	861.50	15,990	675.80	3,720	672.40
75-79 .....	912,010	839.70	813,890	860.40	77,890	665.40	17,530	658.20
75 .....	176,490	839.30	155,860	860.30	16,430	675.50	3,680	681.60
76 .....	177,210	838.20	157,470	859.80	15,840	667.60	3,450	648.10
77 .....	187,180	834.40	167,370	855.00	15,580	659.20	3,740	638.20
78 .....	183,440	840.30	164,570	860.30	15,020	659.70	3,230	658.20
79 .....	187,690	846.40	168,620	866.20	15,020	664.10	3,430	665.10
80-84 .....	826,950	869.50	753,740	887.00	57,520	672.10	12,960	705.00
80 .....	192,360	854.60	174,970	871.80	13,890	663.20	2,930	714.40
81 .....	182,940	865.50	166,230	884.10	13,050	663.70	3,000	693.40
82 .....	161,070	868.50	145,800	886.80	11,920	678.80	2,760	727.70
83 .....	152,690	882.20	140,090	898.70	9,850	678.90	2,230	693.20
84 .....	137,890	882.70	126,650	899.20	8,810	682.00	2,040	690.90
85-89 .....	573,660	855.60	528,020	871.50	35,970	646.90	8,090	698.20
85 .....	133,180	868.80	121,650	887.70	9,190	654.20	2,070	700.90
86 .....	125,480	864.20	115,660	878.30	7,650	673.30	1,730	711.70
87 .....	115,660	856.90	106,690	871.10	6,970	650.90	1,610	722.00
88 .....	105,200	846.90	97,280	862.20	6,220	627.70	1,420	702.20
89 .....	94,140	833.50	86,740	850.70	5,940	616.70	1,260	640.40
90-94 .....	293,250	813.60	272,100	827.90	17,140	612.40	3,570	669.40
95 or older .....	102,590	764.80	94,000	780.70	7,220	576.70	1,240	641.60
<i>By marital status</i>								
Nondisabled widows .....	4,283,060	841.60	3,821,230	862.20	363,600	665.20	86,530	668.80
Surviving divorced wives (nondisabled) .....	303,160	855.00	259,610	875.70	37,370	734.00	5,520	706.50
<b>Widowers</b>								
Subtotal .....	38,470	635.00	30,240	644.70	6,230	610.50	1,900	563.40
60-61 .....	7,850	608.00	6,450	610.40	1,120	607.80	280	552.50
62-64 .....	10,440	691.60	8,460	696.40	1,510	662.40	450	695.90
65-69 .....	7,010	703.60	5,270	721.20	1,340	666.20	370	601.20
70-74 .....	4,020	642.60	2,890	670.10	830	584.20	270	540.00
75-79 .....	3,340	560.60	2,440	586.10	590	505.90	300	468.10
80-84 .....	2,300	543.30	1,750	542.70	440	569.10	100	392.30
85-89 .....	2,080	510.00	1,730	519.50	230	476.60	120	437.70
90 or older .....	1,430	516.10	1,250	519.60	170	508.40	10	213.00

a. Includes 12,460 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).

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

## 5.A OASDI Current-Pay Benefits

**Table 5.A1.7—Number and average monthly benefit for disabled widow(er)s, by race, age, sex, and marital status, December 2001**

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 .....	202,020	535.20	150,070	555.00	41,760	479.30	9,470	469.80
<b>By age</b>								
50-54 .....	27,570	544.70	19,450	566.50	6,600	489.60	1,380	506.40
50 .....	2,040	542.60	1,370	584.90	530	473.60	120	397.50
51 .....	3,650	546.60	2,370	575.60	1,060	491.50	190	493.40
52 .....	5,440	536.70	3,840	550.10	1,310	487.50	260	600.20
53 .....	6,990	557.10	4,940	572.90	1,750	517.20	300	528.80
54 .....	9,450	540.00	6,930	564.40	1,950	469.40	510	475.80
55-59 .....	75,540	533.90	56,610	550.40	14,850	486.80	3,810	472.50
55 .....	10,760	532.30	8,120	545.30	2,060	496.40	530	475.20
56 .....	12,150	541.00	8,980	563.10	2,450	486.60	700	459.90
57 .....	14,760	531.90	10,850	551.00	2,950	488.80	910	446.30
58 .....	17,700	538.80	13,380	548.80	3,350	504.80	920	510.00
59 .....	20,170	527.80	15,280	546.80	4,040	465.70	750	468.30
60-64 .....	98,910	533.50	74,010	555.40	20,310	470.50	4,280	455.50
60 .....	21,570	532.70	16,150	558.20	4,470	455.70	910	458.40
61 .....	20,750	536.70	15,330	556.10	4,200	478.80	1,110	476.40
62 .....	19,910	533.10	14,970	555.20	3,990	469.90	890	456.20
63 .....	18,520	532.20	13,900	551.00	3,850	482.50	720	426.50
64 .....	18,160	532.80	13,660	555.80	3,800	467.00	650	447.00
<b>By sex and marital status</b>								
Disabled widows .....	196,730	539.70	146,570	559.70	40,340	481.70	9,130	473.80
Widows .....	169,300	539.70	125,780	561.10	35,410	477.80	7,520	472.00
Surviving divorced wives .....	27,430	539.60	20,790	551.00	4,930	509.90	1,610	482.10
Disabled widowers .....	5,290	369.80	3,500	356.30	1,420	410.10	340	361.50

a. Includes 720 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).

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

**Table 5.A1.8—Number and average monthly benefit for parents, by race, age, and sex, December 2001**

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 .....	2,650	737.00	1,550	769.00	320	691.00	730	697.80
<b>By age</b>								
62-64 .....	40	759.30	10	684.00	20	822.00	10	709.00
65-69 .....	230	806.40	90	893.00	10	1,051.00	120	739.60
70-74 .....	290	779.20	110	755.80	30	1,144.30	130	695.60
75-79 .....	530	723.80	320	756.50	20	650.00	180	688.40
80-84 .....	520	795.90	310	838.30	70	690.50	140	754.90
85-89 .....	400	724.70	240	794.60	50	626.10	110	617.00
90 or older .....	640	662.10	470	699.90	120	560.10	40	640.80
<b>By sex</b>								
Men .....	320	653.60	100	712.60	20	582.00	200	631.20
Women .....	2,330	748.40	1,450	772.90	300	698.30	530	722.90

a. Includes 50 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).

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, race, age, and sex, December 2001

Age	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>All retired workers</i>								
Total .....	20,574,080	808.40	18,466,080	821.50	1,558,810	704.20	505,560	657.00
62–64 .....	2,570,130	806.90	2,250,860	821.30	225,150	735.90	94,040	633.20
62 .....	676,780	796.10	590,660	809.20	59,770	740.20	26,330	629.90
63 .....	917,770	807.80	805,660	821.90	79,820	735.20	32,260	634.40
64 .....	975,580	813.70	854,540	829.10	85,560	733.60	35,450	634.60
65–69 .....	5,125,420	801.60	4,515,890	816.50	437,770	711.40	169,480	640.80
65 .....	1,126,940	819.20	989,010	834.60	94,710	739.00	43,100	643.30
66 .....	1,072,760	799.20	943,140	814.30	93,700	705.90	35,700	647.20
67 .....	1,013,610	788.60	894,470	803.70	85,890	698.10	32,800	617.30
68 .....	946,070	792.30	834,880	807.10	80,580	697.60	29,920	636.90
69 .....	966,040	806.50	854,390	820.60	82,890	713.30	27,960	658.70
70–74 .....	4,559,930	798.40	4,104,570	811.00	337,400	696.40	106,020	646.80
70 .....	946,340	795.20	847,020	808.50	72,020	699.30	25,900	634.50
71 .....	949,190	792.40	854,070	804.80	69,570	695.00	23,930	639.80
72 .....	891,520	792.00	802,360	804.60	66,380	689.80	19,980	642.60
73 .....	891,230	803.90	804,600	816.00	65,190	700.10	18,280	663.80
74 .....	881,650	809.20	796,520	821.90	64,240	697.50	17,930	661.50
75–79 .....	3,773,480	801.50	3,434,380	812.80	256,810	688.20	68,850	677.80
75 .....	822,740	800.50	746,850	812.30	57,960	687.90	15,170	664.80
76 .....	806,060	815.30	731,680	827.00	56,220	701.70	15,430	688.40
77 .....	768,280	799.70	700,030	810.80	51,790	685.90	13,700	678.50
78 .....	710,820	794.90	649,160	805.90	46,310	677.60	12,990	674.30
79 .....	665,580	795.40	606,660	805.90	44,530	685.40	11,560	683.50
80–84 .....	2,557,720	820.10	2,347,700	831.00	160,800	691.50	39,000	706.90
80 .....	641,890	795.70	588,580	806.30	40,680	673.60	10,290	676.90
81 .....	562,150	795.40	515,580	805.90	35,690	677.00	8,630	671.50
82 .....	488,460	809.00	446,480	820.20	32,530	680.80	7,380	700.30
83 .....	463,370	849.30	427,010	859.90	27,660	715.70	6,750	732.40
84 .....	401,850	873.80	370,050	884.70	24,240	729.80	5,950	789.50
85–89 .....	1,363,230	872.40	1,249,760	884.40	89,540	726.10	19,540	776.80
85 .....	355,020	902.00	325,830	914.10	23,310	754.90	4,660	809.20
86 .....	310,140	884.50	285,980	896.00	18,460	733.80	4,620	781.30
87 .....	270,060	865.10	246,950	878.20	18,220	709.70	4,030	768.10
88 .....	229,320	850.10	210,250	860.90	15,100	719.80	3,400	766.50
89 .....	198,690	836.20	180,750	848.60	14,450	697.30	2,830	741.10
90–94 .....	506,330	809.20	459,140	824.00	39,010	654.60	7,070	705.50
95 or older .....	117,840	744.50	103,780	765.50	12,330	577.50	1,560	655.50
<i>Men</i>								
Subtotal .....	10,207,240	901.10	9,181,200	918.00	739,660	765.70	268,800	707.20
62–64 .....	1,332,710	962.90	1,163,380	989.50	118,470	813.10	50,800	703.40
62 .....	344,390	960.30	298,940	986.60	31,590	818.80	13,840	716.00
63 .....	476,480	963.60	417,160	989.50	41,700	812.30	17,600	707.90
64 .....	511,840	963.90	447,280	991.40	45,180	809.80	19,360	690.30
65–69 .....	2,745,220	926.40	2,421,830	949.00	228,080	781.30	93,820	697.90
65 .....	602,040	956.20	527,010	981.80	50,320	813.60	24,610	699.30
66 .....	573,270	928.30	504,740	951.60	48,530	777.00	19,820	706.60
67 .....	543,880	910.40	480,580	933.10	44,850	766.50	18,160	667.70
68 .....	508,200	908.10	449,570	929.70	41,810	761.20	16,360	695.00
69 .....	517,830	924.30	459,930	944.00	42,570	783.40	14,870	724.00
70–74 .....	2,429,160	898.50	2,198,150	914.90	169,310	757.10	56,210	697.00
70 .....	510,940	901.90	459,440	919.60	36,680	763.90	13,970	695.10
71 .....	512,700	894.10	463,370	910.80	35,700	753.80	12,700	690.50
72 .....	476,810	889.50	431,910	905.20	33,130	752.50	10,510	689.20
73 .....	470,920	902.50	427,590	918.00	32,670	759.10	9,540	716.10
74 .....	457,790	904.90	415,840	921.10	31,130	755.60	9,490	697.50
75–79 .....	1,877,420	870.20	1,717,880	883.20	118,910	734.40	35,430	715.10
75 .....	420,940	884.60	384,450	899.20	27,550	736.60	7,930	707.10
76 .....	404,870	899.10	369,750	913.10	26,300	754.10	7,710	739.80
77 .....	379,140	869.80	347,000	882.30	23,950	739.90	7,170	715.70
78 .....	349,370	849.40	320,840	861.10	20,820	719.40	6,780	709.30
79 .....	323,100	838.20	295,840	849.90	20,290	715.00	5,840	699.60
80–84 .....	1,146,420	839.50	1,059,360	849.30	64,340	717.00	19,070	723.30
80 .....	303,240	825.80	279,500	836.30	17,790	701.90	5,050	696.60
81 .....	259,710	804.80	239,540	814.80	14,820	684.60	4,490	679.90
82 .....	217,900	818.10	200,630	827.30	13,030	705.50	3,570	720.50
83 .....	199,820	872.80	185,640	881.50	10,360	756.10	3,140	750.30
84 .....	165,750	907.10	154,050	916.00	8,340	776.50	2,820	813.30

See footnotes at end of table.

5.A OASDI Current-Pay Benefits

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, race, age, and sex, December 2001—Continued

Age	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)
<b>Men—Continued</b>								
85-89.....	505,260	905.50	466,380	915.00	28,260	782.20	9,120	810.60
85.....	140,670	943.60	130,250	954.00	7,850	805.90	2,140	840.70
86.....	118,580	924.90	110,140	934.10	6,090	794.90	2,000	833.80
87.....	98,120	888.10	89,980	897.60	5,870	775.30	1,920	802.50
88.....	80,730	874.80	74,580	883.00	4,360	768.90	1,600	785.00
89.....	67,160	854.00	61,430	862.80	4,090	741.80	1,460	773.80
90-94.....	146,870	801.00	133,220	811.90	9,800	679.50	3,660	737.50
95 or older.....	24,180	726.50	21,000	744.10	2,490	583.00	690	709.40
<b>Women</b>								
Subtotal.....	10,366,840	717.10	9,284,880	726.20	819,150	648.60	236,760	600.00
62-64.....	1,237,420	639.00	1,087,480	641.40	106,680	650.20	43,240	550.70
62.....	332,390	626.00	291,720	627.40	28,180	652.00	12,490	534.60
63.....	441,290	639.50	388,500	642.00	38,120	650.90	14,660	546.10
64.....	463,740	647.80	407,260	651.00	40,380	648.30	16,090	567.50
65-69.....	2,380,200	657.80	2,094,060	663.20	209,690	635.40	75,660	570.10
65.....	524,900	662.10	462,000	666.60	44,390	654.50	18,490	568.70
66.....	499,490	651.20	438,400	656.20	45,170	629.50	15,880	573.10
67.....	469,730	647.60	413,890	653.30	41,040	623.40	14,640	554.70
68.....	437,870	658.00	385,310	664.00	38,770	628.90	13,560	571.20
69.....	448,210	670.50	394,460	676.70	40,320	639.30	13,090	584.40
70-74.....	2,130,770	684.20	1,906,420	691.20	168,090	635.20	49,810	590.20
70.....	435,400	669.90	387,580	676.80	35,340	632.10	11,930	563.40
71.....	436,490	672.80	390,700	679.10	33,870	633.00	11,230	582.40
72.....	414,710	679.90	370,450	687.20	33,250	627.30	9,470	590.80
73.....	420,310	693.40	377,010	700.30	32,520	640.90	8,740	606.60
74.....	423,860	705.70	380,680	713.40	33,110	643.00	8,440	621.00
75-79.....	1,896,060	733.50	1,716,500	742.40	137,900	648.40	33,420	638.10
75.....	401,800	712.30	362,400	720.10	30,410	643.80	7,240	618.60
76.....	401,190	730.60	361,930	739.10	29,920	655.60	7,720	637.10
77.....	389,140	731.30	353,030	740.60	27,840	639.50	6,530	637.60
78.....	361,450	742.20	328,320	751.90	25,490	643.50	6,210	636.20
79.....	342,480	755.00	310,820	764.10	24,240	660.70	5,720	667.00
80-84.....	1,411,300	804.40	1,288,340	815.90	96,460	674.50	19,930	691.30
80.....	338,650	768.70	309,080	779.30	22,890	651.60	5,240	657.80
81.....	302,440	787.30	276,040	798.10	20,870	671.60	4,140	662.40
82.....	270,560	801.60	245,850	814.50	19,500	664.30	3,810	681.40
83.....	263,550	831.50	241,370	843.20	17,300	691.40	3,610	716.80
84.....	236,100	850.40	216,000	862.40	15,900	705.20	3,130	768.00
85-89.....	857,970	852.90	783,380	866.20	61,280	700.30	10,420	747.20
85.....	214,350	874.80	195,580	887.50	15,460	729.00	2,520	782.50
86.....	191,560	859.40	175,840	872.20	12,370	703.80	2,620	741.20
87.....	171,940	851.90	156,970	867.10	12,350	678.50	2,110	736.70
88.....	148,590	836.70	135,670	848.80	10,740	699.80	1,800	750.20
89.....	131,530	827.00	119,320	841.20	10,360	679.70	1,370	706.30
90-94.....	359,460	812.60	325,920	828.90	29,210	646.20	3,410	671.20
95 or older.....	93,660	749.20	82,780	770.90	9,840	576.10	870	612.80
<b>All disabled workers</b>								
Total.....	35,410	976.70	28,920	1015.00	4,600	854.90	1,890	687.80
62.....	3,830	1,017.90	3,190	1,057.50	450	898.40	190	637.60
63.....	11,750	1,003.20	9,660	1,038.50	1,510	883.50	580	726.80
64.....	19,830	953.00	16,070	992.40	2,640	831.00	1,120	676.10
<b>Men</b>								
Subtotal.....	22,620	1,112.80	19,040	1,152.90	2,360	978.40	1,220	746.70
62.....	2,490	1,144.90	2,140	1,186.00	250	979.20	100	680.10
63.....	7,540	1,144.70	6,420	1,178.90	790	1,014.70	330	792.50
64.....	12,590	1,087.30	10,480	1,130.20	1,320	956.50	790	736.00
<b>Women</b>								
Subtotal.....	12,790	736.10	9,880	749.20	2,240	724.70	670	580.50
62.....	1,340	782.00	1,050	795.50	200	797.30	90	590.30
63.....	4,210	749.80	3,240	760.50	720	739.60	250	640.00
64.....	7,240	719.70	5,590	734.00	1,320	705.60	330	532.70

See footnotes at end of table.

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, race, age, and sex, December 2001—Continued

Age	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)
	<b>All spouses</b>							
Total .....	2,218,340	421.90	2,051,210	429.00	95,570	347.10	65,670	312.10
	<b>Wives</b>							
Subtotal .....	2,207,940	422.80	2,043,730	429.80	94,120	348.90	64,210	314.30
	<b>By age</b>							
62-64 .....	316,960	404.70	285,140	414.80	16,890	332.90	14,600	292.60
62 .....	78,670	393.80	70,900	402.70	3,970	320.20	3,680	305.80
63 .....	112,980	401.30	101,620	411.40	6,050	335.30	5,250	281.70
64 .....	125,310	414.60	112,620	425.50	6,870	338.10	5,670	294.00
65-69 .....	627,720	428.70	571,330	438.00	31,460	349.60	23,560	315.10
65 .....	131,490	431.00	118,670	441.50	6,510	350.90	6,130	316.70
66 .....	129,560	430.30	116,880	440.50	7,020	347.80	5,380	321.30
67 .....	124,900	426.50	113,650	434.90	6,510	363.20	4,420	309.40
68 .....	119,100	426.70	108,940	436.20	5,620	335.00	4,310	311.80
69 .....	122,670	428.90	113,190	436.70	5,800	349.10	3,320	313.90
70-74 .....	581,050	428.00	541,620	434.10	23,960	361.00	13,650	314.00
70 .....	122,050	430.70	113,520	437.20	5,000	369.40	3,200	304.80
71 .....	124,200	428.80	115,230	435.00	5,530	367.30	3,140	315.00
72 .....	114,440	426.80	106,360	433.70	4,720	349.80	2,990	314.20
73 .....	112,230	426.60	104,680	432.30	4,620	357.60	2,480	317.90
74 .....	108,130	426.90	101,830	431.80	4,090	358.80	1,840	322.50
75-79 .....	409,190	417.30	384,970	422.00	14,320	345.80	8,470	331.60
75 .....	96,160	421.10	89,800	427.00	3,800	348.10	2,230	314.80
76 .....	89,520	419.00	84,130	423.50	3,220	353.80	1,860	343.70
77 .....	82,850	411.90	78,210	415.70	2,910	351.80	1,440	328.30
78 .....	73,320	415.90	69,080	420.90	2,360	332.10	1,550	328.10
79 .....	67,340	417.80	63,750	421.80	2,030	336.40	1,390	349.80
80-84 .....	203,770	429.80	194,610	433.10	5,320	354.30	3,050	347.30
85-89 .....	59,220	424.20	56,570	427.30	1,750	342.10	760	378.20
90-94 .....	9,440	393.20	8,950	396.70	390	319.30	100	361.80
95 or older .....	590	388.10	540	386.40	30	373.00	20	456.50
	<b>By type of benefit</b>							
Wives of retired workers .....	2,164,650	425.70	2,007,100	432.60	90,300	352.70	61,500	315.80
Wives of disabled workers .....	43,290	274.90	36,630	276.40	3,820	259.00	2,710	279.20
	<b>Husbands</b>							
Subtotal .....	10,400	226.40	7,480	228.00	1,450	227.60	1,460	217.60

See footnotes at end of table.

## 5.A OASDI Current-Pay Benefits

**Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, race, age, and sex, December 2001—Continued**

Age	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>All nondisabled widow(er)s</i>							
Total .....	2,685,190	768.20	2,341,410	787.40	279,800	638.00	57,610	628.20
60-64 .....	454,330	801.90	384,150	824.70	54,950	682.30	14,670	657.10
60 .....	53,540	806.60	45,490	826.40	6,340	693.10	1,660	699.90
61 .....	79,700	794.70	66,880	816.30	10,370	688.20	2,420	658.30
62 .....	95,870	806.40	81,080	829.80	11,420	684.70	3,290	653.10
63 .....	109,620	803.00	93,070	826.80	12,830	672.90	3,560	647.90
64 .....	115,600	799.80	97,630	823.20	13,990	679.80	3,740	649.80
65-69 .....	559,580	815.90	478,490	840.40	64,990	674.50	14,610	648.30
65 .....	119,460	826.70	101,810	852.90	13,730	675.50	3,550	663.40
66 .....	115,340	819.60	98,590	843.70	13,470	682.20	3,050	655.20
67 .....	111,390	817.20	95,430	839.70	13,010	690.70	2,670	644.00
68 .....	105,710	810.20	90,630	834.90	12,270	664.90	2,510	634.20
69 .....	107,680	804.00	92,030	829.10	12,510	657.90	2,830	638.80
70-74 .....	516,310	790.30	447,890	812.20	56,150	649.10	10,640	624.80
70 .....	100,270	801.80	86,340	824.60	11,370	660.70	2,290	650.00
71 .....	104,330	797.80	90,530	819.50	11,250	660.80	2,170	624.00
72 .....	102,070	791.80	87,960	815.90	11,450	640.90	2,260	621.20
73 .....	103,410	784.50	90,170	805.80	11,080	647.90	1,860	587.70
74 .....	106,230	776.30	92,890	796.40	11,000	634.90	2,060	635.30
75-79 .....	497,320	751.80	438,010	770.80	49,300	609.20	8,600	606.70
75 .....	105,070	765.10	91,470	784.70	11,270	627.10	1,960	651.40
76 .....	101,030	759.80	88,870	778.90	10,090	619.50	1,820	612.60
77 .....	101,440	748.50	89,590	768.30	9,690	594.30	1,910	601.30
78 .....	96,260	744.80	85,280	762.40	9,280	608.00	1,390	576.70
79 .....	93,520	739.10	82,800	757.90	8,970	592.40	1,520	575.90
80-84 .....	355,830	728.10	319,870	743.60	29,860	585.00	5,200	595.70
85-89 .....	191,410	668.00	172,400	682.10	15,970	537.70	2,760	541.20
90-94 .....	84,860	663.20	77,480	674.80	6,450	541.20	850	537.80
95 or older .....	25,550	658.40	23,120	669.90	2,130	545.90	280	580.50

a. Includes 6,370 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.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.A4—Number and total monthly benefits, December 1940–2001, 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								
<b>Number</b>											
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
1986	37,702,976	33,707,103	3,995,873	22,980,948	2,728,463	3,386,917	3,294,587	350,546	4,928,019	8,726	24,770
1987	38,189,919	34,145,244	4,044,675	23,439,684	2,785,859	3,380,856	3,243,939	328,838	4,983,846	7,890	19,007
1988	38,627,019	34,552,719	4,074,300	23,858,226	2,830,284	3,366,843	3,203,822	317,761	5,028,822	7,145	14,116
1989	39,151,370	35,022,543	4,128,827	24,326,604	2,895,364	3,364,563	3,165,113	312,079	5,070,873	6,484	10,290
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
<b>Total monthly benefits (thousands of dollars)</b>											
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
1986	16,534,384	15,027,053	1,507,331	11,225,159	1,331,144	816,351	860,953	118,602	2,175,345	3,371	3,459
1987	17,612,946	16,016,257	1,596,689	12,016,444	1,415,811	856,263	883,739	115,966	2,318,748	3,213	2,763
1988	18,691,340	17,008,453	1,682,887	12,806,481	1,498,637	893,521	908,660	116,902	2,461,948	3,061	2,132
1989	20,037,582	18,237,927	1,799,655	13,789,570	1,609,780	944,429	938,538	120,970	2,629,728	2,941	1,627
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	20,864,652	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

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: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

## 5.A OASDI Current-Pay Benefits

**Table 5.A5—Number and average age, by type of benefit, December 2001**

Type of benefit	Number <sup>a</sup> (thousands)	Average age
Total, OASDI.....	45,874	66
OASI.....	38,961	71
Retired workers.....	28,842	74
Spouses.....	2,738	72
Children of retired workers.....	467	24
Under age 18.....	261	13
Disabled, aged 18 or older.....	192	40
Students, aged 18–19.....	13	18
Children of deceased workers.....	1,890	21
Under age 18.....	1,344	12
Disabled, aged 18 or older.....	490	47
Students, aged 18–19.....	57	18
Nondisabled widow(er)s.....	4,625	77
Widowed mothers and fathers.....	195	43
Disabled widow(er)s.....	202	59
Parents of deceased workers.....	3	82
DI.....	6,913	43
Disabled workers.....	5,265	51
Spouses.....	157	49
Children.....	1,490	12
Under age 18.....	1,393	12
Disabled, adult children.....	59	27
Students, aged 18–19.....	38	18

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

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

**Table 5.A6—Number and average monthly benefit, by type of benefit, race, and sex, December 2001**

Type of benefit	All races <sup>a</sup>	White	Black	Other <sup>b</sup>
<b>Number<sup>c</sup> (thousands)</b>				
Total, OASDI.....	45,874	39,115	4,696	1,900
Men.....	17,973	15,583	1,606	729
Women.....	24,054	20,924	2,257	795
Children.....	3,847	2,608	833	376
Under age 18.....	2,997	1,945	680	344
Disabled, aged 18 or older.....	742	587	130	23
Students, aged 18–19.....	108	75	23	8
Retired workers and their spouses and children.....	32,046	28,480	2,551	936
Retired workers.....	28,842	25,637	2,327	808
Wives and husbands.....	2,738	2,499	131	99
Children.....	467	344	93	29
Disabled workers and their spouses and children.....	6,913	4,961	1,233	670
Disabled workers.....	5,265	3,852	904	472
Wives and husbands.....	157	119	19	18
Children.....	1,490	991	309	180
Survivors of deceased workers	6,915	5,674	913	295
Nondisabled widow(er)s.....	4,625	4,111	407	94
Disabled widow(er)s.....	202	150	42	9
Widowed mothers and fathers.....	195	137	32	23
Children.....	1,890	1,273	431	167
Parents.....	3	2	<sup>d</sup>	1
<b>Average monthly benefit (dollars)</b>				
Retired workers.....	874.50	890.50	753.50	718.10
Men.....	984.90	1,005.60	826.00	773.70
Women.....	755.90	765.80	687.20	646.30
Disabled workers.....	814.90	839.50	757.80	726.90
Men.....	913.80	949.40	817.60	801.60
Women.....	688.70	695.20	690.00	633.80
Widowed mothers and fathers.....	618.50	661.00	528.00	494.20
Nondisabled widow(er)s.....	840.80	861.50	670.70	668.90
Surviving children.....	569.70	613.60	480.50	466.20

- a. Includes 163,160 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. Fewer than 500 beneficiaries.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.



Table 5.A7—Number and average monthly benefit for women, by type of benefit and race, December 2001

Type of benefit and basis of entitlement	All races <sup>a</sup>		White		Black		Other	
	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>b</sup> .....	24,054	724.80	20,924	737.10	2,257	657.00	795	592.00
Workers .....	16,225	746.30	13,970	757.40	1,639	687.90	563	641.60
Retired .....	13,912	755.90	12,304	765.80	1,215	687.20	353	646.30
Full benefit .....	3,545	869.30	3,019	887.70	396	766.90	116	740.90
Reduced benefit .....	10,367	717.10	9,285	726.20	819	648.60	237	600.00
Disabled .....	2,313	688.70	1,665	695.20	424	690.00	210	633.80
Wives of retired and disabled workers .....	2,858	432.80	2,595	443.70	146	343.60	109	297.90
Entitlement based on care of children .....	158	232.00	117	247.50	21	208.60	19	163.90
Husband retired .....	54	347.10	43	364.60	7	314.90	5	235.60
Husband disabled .....	104	171.80	75	180.80	14	156.10	14	141.20
Entitlement based on age .....	2,700	444.60	2,477	453.00	125	366.50	90	325.70
Husband retired .....	2,651	447.60	2,436	455.90	120	370.30	87	327.30
Full benefit .....	484	546.00	427	565.80	29	424.50	25	355.10
Reduced benefit .....	2,167	425.70	2,009	432.50	90	352.70	62	315.80
Husband disabled .....	50	282.40	42	284.00	5	268.90	3	282.20
Widows .....	4,968	822.40	4,358	847.00	472	646.20	123	625.20
Entitlement based on care of children .....	185	623.30	131	666.90	30	528.90	22	496.20
Nondisabled, aged 60 or older .....	4,586	842.50	4,081	863.10	401	671.70	92	671.10
Disabled, aged 50–64 .....	197	539.70	147	559.70	40	481.70	9	473.80
<b>All women aged 65 or older</b>								
Total <sup>c</sup> .....	19,207	745.00	17,120	756.10	1,565	664.10	463	608.60
Entitled as worker .....	12,674	767.30	11,217	777.80	1,109	690.70	310	659.70
Worker only .....	7,064	738.20	6,037	752.40	776	659.40	231	637.00
Dually entitled .....	5,611	804.00	5,180	807.50	333	763.60	79	726.30
Wife's benefit .....	2,254	522.40	2,132	524.90	81	468.20	35	495.20
Widow's benefit .....	3,356	993.10	3,049	1,005.20	252	858.40	43	913.30
Entitled as wife or widow only .....	6,532	701.70	5,903	714.70	456	599.40	154	505.80
Wife's benefit .....	2,381	450.00	2,190	458.00	107	371.90	75	332.20
Widow's benefit .....	4,152	846.00	3,713	866.10	349	669.50	78	673.30

a. Includes 78 persons of unknown race. In years prior to 1993, persons of unknown race were included with White.

b. Includes special age-72 beneficiaries and parents; excludes adults receiving benefits because of a childhood disability.

c. Excludes parents, special age-72 beneficiaries, and adults receiving benefits because of a childhood disability.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

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, December 2001

Type of benefit and sex	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)
All beneficiaries .....	134,900	533.68	608.00
Retired workers .....	121,290	531.01	633.13
Men .....	27,447	515.40	456.81
Women .....	93,843	535.58	684.70
Wives and husbands of retired workers .....	4,047	516.48	210.21
Children of retired workers .....	532	521.90	208.18
Disabled workers .....	13	526.78	525.23
Wives, husbands, and children of disabled workers .....	6	508.95	135.67
Nondisabled widow(er)s .....	7,489	577.65	486.94
Disabled widow(er)s .....	240	575.44	362.73
Widowed mothers and fathers .....	46	572.03	371.04
Children of deceased workers .....	1,237	581.03	409.23

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

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits

Table 5.A10—Number and average monthly benefit for beneficiaries aged 60 or older, by type of benefit, age, and sex, December 2001

Type of benefit	Total, 60 or older <sup>a</sup>	60-61	62-64	65-69	70-74	75-79	80-84	85-89	90-94	95 or older <sup>b</sup>
<b>Number (thousands)</b>										
<i>All beneficiaries</i>										
Total .....	37,608	673	4,009	8,865	8,154	6,939	4,872	2,701	1,083	311
Retired workers <sup>c</sup> .....	28,842	...	2,570	7,409	6,636	5,472	3,752	2,028	769	206
Widows, widowers, parents, and mothers and fathers .....	4,736	179	382	681	775	916	830	576	295	103
Wives and husbands .....	2,748	6	328	750	724	539	284	95	19	2
Disabled workers .....	1,180	471	709	...	...	...	...	...	...	...
Disabled children <sup>d</sup> .....	102	16	21	26	19	12	6	2	e	e
<i>Men</i>										
Subtotal .....	15,733	285	1,768	4,152	3,652	2,874	1,821	853	272	57
Retired workers <sup>c</sup> .....	14,930	...	1,333	4,125	3,628	2,858	1,812	848	270	57
Widowers, parents, and fathers .....	41	9	11	7	4	3	2	2	1	e
Husbands .....	35	d	2	8	10	8	4	2	1	e
Disabled workers .....	679	267	412	...	...	...	...	...	...	...
Disabled children <sup>d</sup> .....	48	8	11	13	9	5	2	1	e	e
<i>Women</i>										
Subtotal .....	21,874	388	2,241	4,713	4,503	4,066	3,051	1,848	811	254
Retired workers <sup>c</sup> .....	13,912	...	1,237	3,284	3,008	2,614	1,940	1,180	500	149
Widows, parents, and mothers .....	4,695	170	370	673	771	913	828	574	294	103
Wives .....	2,713	6	327	742	714	532	280	93	18	2
Disabled workers .....	501	204	297	...	...	...	...	...	...	...
Disabled children <sup>d</sup> .....	54	8	10	13	10	7	4	2	e	e
<b>Average monthly benefit (dollars)</b>										
<i>All beneficiaries</i>										
Total .....	837.30	836.60	783.30	829.00	829.40	832.90	860.00	932.20	864.90	802.70
Retired workers <sup>c</sup> .....	874.50	...	806.90	867.90	870.60	871.20	889.00	975.90	894.90	825.60
Widows, widowers, parents, and mothers and fathers .....	833.90	734.30	762.30	843.70	843.60	838.60	868.50	854.20	812.30	763.80
Wives and husbands .....	441.80	353.70	402.90	441.80	445.10	442.60	461.80	485.30	470.50	444.90
Disabled workers .....	891.30	890.60	891.80	...	...	...	...	...	...	...
Disabled children <sup>d</sup> .....	521.80	570.50	555.00	527.70	500.60	475.00	457.60	418.90	e	e
<i>Men</i>										
Subtotal .....	983.70	1,019.00	977.40	997.00	983.60	962.20	949.30	1,076.50	967.90	903.00
Retired workers <sup>c</sup> .....	984.90	...	962.90	1,000.40	987.20	965.40	951.90	1,080.60	972.40	906.00
Widowers, parents, and fathers .....	621.50	577.50	665.30	704.00	643.30	557.90	545.10	512.20	528.60	e
Husbands .....	248.20	e	206.70	244.30	256.40	239.10	250.70	268.90	280.00	e
Disabled workers .....	1,047.60	1,048.10	1,047.30	...	...	...	...	...	...	...
Disabled children <sup>d</sup> .....	526.30	576.00	553.50	525.20	498.80	481.00	448.60	438.40	e	e
<i>Women</i>										
Subtotal .....	732.00	702.50	630.20	680.90	704.30	741.60	806.80	865.60	830.40	780.20
Retired workers <sup>c</sup> .....	755.90	...	639.00	701.40	729.90	768.30	830.10	900.70	853.10	795.10
Widows, parents, and mothers .....	835.80	742.80	765.30	845.20	844.70	839.70	869.50	855.50	813.50	764.30
Wives .....	444.30	356.50	403.90	443.90	447.80	445.50	464.70	490.80	479.90	456.20
Disabled workers .....	679.30	683.90	676.20	...	...	...	...	...	...	...
Disabled children <sup>d</sup> .....	517.70	564.80	556.70	530.10	502.20	471.10	462.50	410.50	e	e

- a. The sum of the individual categories may not equal total because of independent rounding.
- b. Includes 39,097 persons aged 100 or older— 5,553 men and 33,544 women.
- c. Includes special age-72 beneficiaries.
- d. Includes adults receiving benefits because of a childhood disability.
- e. Fewer than 500 beneficiaries.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

**Table 5.A14—Number and percentage distribution of women aged 62 or older, by type of benefit and dual entitlement status, December 1960–2001, selected years**

Basis of entitlement and type of benefit	1960	1970	1975	1980	1985	1990	1995	2000	2001
<b>Number (thousands)</b>									
All women, 62 or older <sup>a</sup> .....	6,619	11,374	14,010	16,350	18,412	19,954	20,888	21,381	21,442
Entitled as worker <sup>b</sup> .....	2,866	5,753	7,586	9,304	10,805	12,037	12,974	14,013	14,205
Worker only .....	2,563	4,786	5,926	6,710	7,096	7,359	7,554	8,117	8,244
Dually entitled <sup>c</sup> .....	303	967	1,660	2,594	3,709	4,678	5,420	5,896	5,962
Wife's benefit .....	159	388	617	1,016	1,594	2,077	2,398	2,568	2,584
Widow's benefit .....	141	574	1,039	1,575	2,112	2,600	3,022	3,327	3,377
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	7,237
Wife's benefit .....	2,174	2,546	2,745	2,884	3,018	3,059	2,985	2,768	2,711
Widow's benefit <sup>d</sup> .....	1,546	3,048	3,659	4,148	4,580	4,853	4,926	4,598	4,524
<b>Percentage distribution</b>									
All women, 62 or older <sup>a</sup> .....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.00	100.0
Entitled as worker <sup>b</sup> .....	43.3	50.6	54.1	56.9	58.7	60.3	62.1	65.5	66.2
Worker only .....	38.7	42.1	42.3	41.0	38.5	36.9	36.2	38.0	38.4
Dually entitled <sup>c</sup> .....	4.6	8.5	11.8	15.9	20.1	23.4	25.9	27.6	27.8
Wife's benefit .....	2.4	3.4	4.4	6.2	8.7	10.4	11.5	12.0	12.0
Widow's benefit .....	2.1	5.0	7.4	9.6	11.5	13.0	14.4	15.6	15.8
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	33.8
Wife's benefit .....	32.8	22.4	19.6	17.6	16.4	15.3	14.3	12.9	12.6
Widow's benefit <sup>d</sup> .....	23.4	26.8	26.1	25.4	24.9	24.3	23.6	21.5	21.1

- a. Excludes special age-72 beneficiaries and adults receiving benefits because of a childhood disability.
- b. Includes disabled workers.
- c. Includes parents.
- d. Includes disabled widows and mothers.

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1995, 2000, and 2001 are based on a 10 percent sample. All other years are 100 percent data.  
 CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

**Table 5.A15—Number and average monthly benefit for women aged 65 or older, by age, type of benefit, and dual entitlement status, December 2001**

Basis of entitlement and type of benefit	Total, 65 or older	65–69	70–74	75–79	80–84	85–89	90 or older
<b>Number</b>							
All women, 65 or older <sup>a</sup> .....	19,206,550	4,699,110	4,492,110	4,057,840	3,046,870	1,846,440	1,064,180
Entitled as worker .....	12,674,340	3,284,280	3,007,850	2,614,010	1,939,570	1,179,900	648,730
Worker only .....	7,063,820	2,175,720	1,743,400	1,337,420	879,790	593,600	333,890
Dually entitled .....	5,610,520	1,108,560	1,264,450	1,276,590	1,059,780	586,300	314,840
Wife's benefit .....	2,254,370	800,390	687,230	470,050	227,840	58,290	10,570
Widow's benefit .....	3,356,150	308,170	577,220	806,540	831,940	528,010	304,270
Entitled as wife or widow only .....	6,532,210	1,414,830	1,484,260	1,443,830	1,107,300	666,540	415,450
Wife's benefit .....	2,380,650	742,020	713,970	531,820	280,350	92,880	19,610
Widow's benefit .....	4,151,560	672,810	770,290	912,010	826,950	573,660	395,840
<b>Average monthly benefit (dollars)</b>							
All women, 65 or older <sup>a</sup> .....	745.00	681.30	704.70	742.00	807.20	866.00	818.70
Entitled as worker .....	767.30	701.40	729.90	768.30	830.10	900.70	839.80
Worker only .....	738.20	720.30	721.50	721.20	740.70	857.00	791.70
Dually entitled .....	804.00	664.30	741.50	817.60	904.40	944.90	890.90
Wife's benefit .....	522.40	532.60	518.50	507.40	520.40	552.00	547.80
Widow's benefit .....	993.10	1,006.30	1,006.90	998.40	1,009.60	988.30	902.80
Entitled as wife or widow only .....	701.70	634.80	653.80	694.50	767.00	804.70	785.70
Wife's benefit .....	450.00	443.90	447.80	445.50	464.70	490.80	477.90
Widow's benefit .....	846.00	845.30	844.70	839.70	869.50	855.60	801.00

- a. Excludes parents, special age-72 beneficiaries, and adults receiving benefits because of a childhood disability.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.  
 CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits

Table 5.A16—Number and average monthly benefit for adult beneficiaries, by type of benefit, sex, and age, December 2001

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> .....	42,775	5,840	4,009	32,926	824.69	745.59	783.15	843.78
Retired workers.....	28,837	...	2,570	26,267	874.44	...	806.87	881.05
Disabled workers.....	5,274	4,565	709	...	814.46	802.63	890.68	...
Wives and husbands of retired workers.....	2,742	47	300	2,395	442.69	338.71	414.82	448.23
Wives and husbands of disabled workers.....	157	105	29	23	207.08	170.88	277.45	284.85
Nondisabled widow(er)s.....	4,624	132	318	4,174	840.83	800.52	806.94	844.69
Disabled widow(er)s.....	204	147	57	...	536.69	538.17	532.88	...
Mothers and fathers.....	197	191	5	1	620.78	619.55	666.14	609.67
Disabled adult children.....	737	652	20	64	537.58	540.92	554.32	498.62
<b>Men</b>								
Subtotal.....	18,375	2,930	1,770	13,676	960.68	844.80	976.96	983.40
Retired workers.....	14,930	...	1,336	13,594	984.58	...	962.15	986.79
Disabled workers.....	2,952	2,542	410	...	913.72	892.12	1,047.63	...
Husbands of retired workers.....	34	<sup>b</sup>	1	32	250.27	<sup>b</sup>	222.95	251.27
Husbands of disabled workers.....	4	2	<sup>b</sup>	2	164.54	132.57	<sup>b</sup>	205.35
Nondisabled widowers.....	37	7	10	20	636.83	604.46	696.31	618.34
Disabled widowers.....	6	4	1	...	374.84	376.53	368.13	...
Fathers.....	10	10	<sup>b</sup>	<sup>b</sup>	528.10	527.96	<sup>b</sup>	<sup>b</sup>
Disabled adult children.....	403	364	10	28	535.29	537.91	548.23	496.68
<b>Women</b>								
Subtotal.....	24,399	2,910	2,239	19,250	722.27	645.71	629.95	744.59
Retired workers.....	13,907	...	1,234	12,673	756.18	...	638.63	767.63
Disabled workers.....	2,322	2,024	299	...	688.28	690.23	675.12	...
Wives of retired workers.....	2,708	47	299	2,362	445.08	338.83	415.57	450.93
Wives of disabled workers.....	153	103	29	21	208.21	171.62	279.29	290.71
Nondisabled widows.....	4,587	125	308	4,154	842.49	812.00	810.59	845.78
Disabled widows.....	199	143	56	...	541.23	543.22	536.18	...
Mothers.....	187	182	5	1	625.73	624.54	668.87	612.91
Disabled adult children.....	334	288	10	36	540.34	544.73	560.53	500.11

a. Includes parents and special age-72 beneficiaries. Excludes 108,983 student beneficiaries aged 18–19.

b. Fewer than 500 beneficiaries.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Angela Y. Harper (410) 966-9541.

**Table 5.A17—Number and average monthly benefit for disabled beneficiaries, by type of benefit, December 1957–2001**

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

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Angela Y. Harper (410) 966-9541.

**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 2001**

Age	Total			Men			Women		
	Number	Average		Number	Average		Number	Average	
		Primary insurance amount (dollars)	Monthly benefit (dollars)		Primary insurance amount (dollars)	Monthly benefit (dollars)		Primary insurance amount (dollars)	Monthly benefit (dollars)
Total .....	4,068,770	1,100.80	1,188.80	2,523,860	1,220.50	1,298.10	1,544,910	905.30	1,010.30
66-69 .....	639,400	1,113.60	1,174.80	418,730	1,231.70	1,291.70	220,670	889.70	953.00
66 .....	14,110	875.10	910.30	8,180	954.10	977.20	5,930	766.00	818.10
67 .....	204,670	1,126.70	1,161.20	136,860	1,237.90	1,268.10	67,810	902.20	945.30
68 .....	208,580	1,111.10	1,177.50	136,660	1,230.60	1,296.50	71,920	883.90	951.20
69 .....	212,040	1,119.50	1,202.90	137,030	1,243.00	1,329.20	75,010	893.70	972.20
70-74 .....	1,098,110	1,073.50	1,180.60	679,570	1,208.00	1,313.70	418,540	855.20	964.50
70 .....	223,880	1,076.80	1,181.70	138,790	1,210.80	1,316.70	85,090	858.10	961.40
71 .....	228,010	1,063.60	1,170.80	140,580	1,201.70	1,310.30	87,430	841.70	946.60
72 .....	217,130	1,055.80	1,169.70	133,070	1,189.70	1,303.60	84,060	843.80	957.80
73 .....	216,110	1,080.70	1,184.90	134,250	1,215.80	1,316.00	81,860	859.20	969.80
74 .....	212,980	1,091.50	1,196.70	132,880	1,222.00	1,322.20	80,100	874.90	988.70
75-79 .....	975,670	1,066.20	1,162.20	617,660	1,182.10	1,263.90	358,010	866.20	986.80
75 .....	212,100	1,076.60	1,169.90	133,350	1,198.80	1,282.30	78,750	869.60	979.50
76 .....	189,330	1,099.10	1,201.90	118,700	1,223.90	1,318.20	70,630	889.40	1,006.40
77 .....	203,900	1,067.50	1,157.50	129,250	1,184.90	1,259.30	74,650	864.20	981.20
78 .....	191,770	1,047.20	1,142.20	122,240	1,156.60	1,233.60	69,530	854.80	981.60
79 .....	178,570	1,037.80	1,137.80	114,120	1,143.20	1,223.50	64,450	851.20	986.10
80-84 .....	713,650	1,060.10	1,163.80	446,170	1,166.50	1,247.70	267,480	882.60	1,023.90
80 .....	175,050	1,026.70	1,126.40	110,400	1,132.60	1,211.30	64,650	845.70	981.40
81 .....	162,370	1,016.50	1,119.90	102,910	1,118.00	1,197.00	59,460	840.80	986.50
82 .....	136,810	1,044.30	1,147.80	85,860	1,145.00	1,226.10	50,950	874.40	1,016.00
83 .....	125,620	1,107.30	1,214.70	76,560	1,220.10	1,305.00	49,060	931.20	1,073.80
84 .....	113,800	1,140.90	1,247.20	70,440	1,258.60	1,343.00	43,360	949.60	1,091.40
85-89 .....	408,770	1,315.20	1,365.40	243,500	1,441.00	1,473.40	165,270	1,129.70	1,206.40
85 .....	99,910	1,375.00	1,423.80	60,710	1,504.50	1,536.70	39,200	1,174.40	1,249.00
86 .....	91,750	1,349.40	1,396.80	55,800	1,475.80	1,507.80	35,950	1,153.10	1,224.50
87 .....	85,630	1,308.50	1,360.10	50,620	1,430.20	1,461.80	35,010	1,132.60	1,213.10
88 .....	72,450	1,272.50	1,324.00	42,570	1,394.60	1,426.80	29,880	1,098.50	1,177.70
89 .....	59,030	1,222.90	1,276.40	33,800	1,344.50	1,379.10	25,230	1,059.90	1,138.80
90 or older .....	233,170	1,087.70	1,144.30	118,230	1,202.80	1,238.80	114,940	969.20	1,047.20

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

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 2001

Age	Total			Men			Women		
	Number	Average		Number	Average		Number	Average	
		Primary insurance amount (dollars)	Monthly benefit (dollars)		Primary insurance amount (dollars)	Monthly benefit (dollars)		Primary insurance amount (dollars)	Monthly benefit (dollars)
Total .....	4,198,900	838.20	893.50	2,198,920	1,013.90	1,014.60	1,999,980	645.10	760.30
65-69 .....	1,644,110	927.80	954.90	960,700	1,085.40	1,085.00	683,410	706.30	772.10
65 .....	424,240	1,005.80	1,023.30	259,450	1,157.90	1,157.20	164,790	766.40	812.50
66 .....	462,470	987.00	1,007.00	282,970	1,134.70	1,134.40	179,500	754.30	806.30
67 .....	276,500	858.40	892.10	153,350	1,018.40	1,018.10	123,150	659.20	735.10
68 .....	246,380	844.60	881.10	137,130	1,002.70	1,002.50	109,250	646.30	728.80
69 .....	234,520	839.20	880.20	127,800	998.30	998.10	106,720	648.80	739.00
70-74 .....	978,290	804.90	859.00	519,760	974.10	974.60	458,530	613.10	728.00
70 .....	216,440	824.40	870.00	117,350	986.90	987.10	99,090	631.90	731.30
71 .....	208,150	810.40	860.50	111,950	973.20	973.50	96,200	621.10	729.10
72 .....	191,820	795.60	852.40	101,250	964.20	964.90	90,570	607.10	726.60
73 .....	187,250	796.20	855.10	97,320	974.10	974.60	89,930	603.70	725.70
74 .....	174,630	793.90	855.10	91,890	969.90	970.90	82,740	598.40	726.60
75-79 .....	722,720	765.10	842.30	362,790	948.00	949.40	359,930	580.70	734.40
75 .....	163,030	782.20	850.90	86,130	961.60	962.50	76,900	581.20	726.00
76 .....	156,980	788.60	858.00	80,540	972.30	973.90	76,440	595.00	735.90
77 .....	146,720	759.10	839.60	72,490	945.20	946.50	74,230	577.30	735.30
78 .....	133,890	744.90	828.30	65,070	926.40	928.60	68,820	573.30	733.60
79 .....	122,100	741.50	829.10	58,560	922.10	923.10	63,540	575.00	742.40
80-84 .....	480,410	755.10	847.10	219,630	935.20	937.60	260,780	603.40	770.90
80 .....	118,760	746.50	835.70	57,260	924.90	927.30	61,500	580.40	750.40
81 .....	106,310	729.60	823.20	49,780	906.40	909.10	56,530	573.90	747.60
82 .....	91,140	746.10	838.80	40,640	931.10	932.80	50,500	597.10	763.10
83 .....	87,550	773.90	866.10	38,760	950.30	953.10	48,790	633.90	797.00
84 .....	76,650	793.00	886.40	33,190	983.20	986.00	43,460	647.70	810.20
85-89 .....	255,770	810.90	905.20	99,110	1,004.70	1,008.40	156,660	688.20	839.90
85 .....	68,510	848.10	934.10	28,750	1,045.60	1,047.60	39,760	705.40	852.10
86 .....	61,470	823.00	916.50	24,230	1,016.30	1,020.90	37,240	697.30	848.70
87 .....	54,210	798.00	896.10	20,890	984.50	987.60	33,320	681.00	838.70
88 .....	41,680	781.80	887.10	14,750	981.10	985.80	26,930	672.70	833.00
89 .....	29,900	764.30	857.70	10,490	939.60	945.90	19,410	669.50	810.00
90 or older .....	117,600	710.50	799.10	36,930	852.30	860.60	80,670	645.50	770.90

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

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 2001

Age	Total			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 .....	4,753,200	1,138.00	1,158.50	2,857,500	1,247.90	1,270.40	1,895,700	972.30	989.70
66-69 .....	692,900	1,150.70	1,160.60	449,900	1,265.70	1,276.80	243,000	937.80	945.50
66 .....	14,900	949.00	952.80	8,800	1,047.70	1,051.80	6,100	806.60	810.10
67 .....	204,700	1,155.10	1,160.30	138,200	1,260.40	1,266.10	66,500	936.20	940.40
68 .....	236,600	1,145.50	1,155.60	152,000	1,264.80	1,276.20	84,600	931.20	938.80
69 .....	236,700	1,164.70	1,179.00	150,900	1,284.10	1,300.30	85,800	954.70	965.70
70-74 .....	1,292,900	1,131.60	1,151.60	786,200	1,262.10	1,284.40	506,700	929.00	945.50
70 .....	258,500	1,137.50	1,155.80	156,000	1,267.30	1,287.30	102,500	939.80	955.60
71 .....	275,200	1,122.60	1,142.40	170,200	1,249.60	1,271.80	105,000	916.80	932.80
72 .....	252,300	1,123.20	1,143.80	152,400	1,250.60	1,273.50	99,900	928.90	945.80
73 .....	254,500	1,124.40	1,145.10	151,200	1,264.90	1,288.30	103,300	918.80	935.40
74 .....	252,400	1,150.90	1,171.70	156,400	1,279.10	1,302.10	96,000	942.00	959.10
75-79 .....	1,139,500	1,103.50	1,125.00	692,900	1,205.30	1,228.70	446,600	945.70	964.20
75 .....	244,600	1,115.30	1,134.80	148,600	1,218.60	1,239.30	96,000	955.40	973.00
76 .....	223,900	1,130.10	1,151.90	132,200	1,254.90	1,279.40	91,700	950.10	968.00
77 .....	241,400	1,100.60	1,122.00	148,300	1,207.60	1,231.10	93,100	930.30	948.30
78 .....	216,700	1,087.00	1,108.70	132,600	1,179.00	1,202.50	84,100	942.00	960.80
79 .....	212,900	1,082.20	1,105.60	131,200	1,164.00	1,189.40	81,700	950.90	971.00
80-84 .....	845,600	1,106.50	1,129.20	506,500	1,193.30	1,218.20	339,100	976.80	996.30
80 .....	209,200	1,063.60	1,085.80	126,200	1,154.50	1,178.80	83,000	925.50	944.40
81 .....	187,800	1,058.20	1,079.80	114,100	1,129.70	1,153.10	73,700	947.60	966.40
82 .....	164,500	1,112.80	1,136.30	102,100	1,191.30	1,217.20	62,400	984.30	1,004.00
83 .....	152,400	1,154.40	1,178.30	88,500	1,248.80	1,275.10	63,900	1,023.60	1,044.10
84 .....	131,700	1,180.00	1,202.90	75,600	1,291.80	1,316.90	56,100	1,029.40	1,049.20
85-89 .....	500,000	1,299.90	1,327.30	285,200	1,421.90	1,453.10	214,800	1,137.80	1,160.20
85 .....	120,000	1,357.80	1,385.80	69,400	1,489.30	1,521.20	50,600	1,177.40	1,200.20
86 .....	111,400	1,327.30	1,353.90	63,800	1,449.40	1,479.50	47,600	1,163.60	1,185.50
87 .....	106,400	1,305.80	1,334.40	62,900	1,431.60	1,465.20	43,500	1,124.00	1,145.30
88 .....	85,500	1,253.40	1,279.20	48,000	1,365.40	1,393.80	37,500	1,110.00	1,132.60
89 .....	76,700	1,212.90	1,240.70	41,100	1,316.40	1,347.80	35,600	1,093.40	1,117.00
90 or older .....	282,300	1,083.00	1,108.20	136,800	1,163.70	1,193.10	145,500	1,007.10	1,028.50

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

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.



**Table 5.B4—Number, percentage, and average monthly benefit, by year of entitlement as retired worker and sex, December 2001**

Year of entitlement	Total				Men				Women			
	Number as of December 2001	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)	Number as of December 2001	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)	Number as of December 2001	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)
All retired workers.....	28,841,820	100.0	...	874.50	14,930,060	100.0	...	984.90	13,911,760	100.0	...	755.90
2000–2001.....	3,449,420	12.0	...	903.00	1,912,090	12.8	...	1,055.20	1,537,330	11.1	...	713.70
1995–1999.....	7,424,800	25.7	...	865.70	4,031,210	27.0	...	999.00	3,393,590	24.4	...	707.30
1990–1994.....	6,465,680	22.4	...	866.80	3,570,730	23.9	...	980.90	2,894,950	20.8	...	726.00
1985–1989.....	5,249,640	18.2	...	854.90	2,739,950	18.4	...	943.70	2,509,690	18.0	...	758.00
1980–1984.....	3,541,920	12.3	...	892.20	1,679,590	11.2	...	956.80	1,862,330	13.4	...	833.90
1975–1979.....	1,836,600	6.4	...	925.80	738,080	4.9	...	1,001.90	1,098,520	7.9	...	874.60
1970–1974.....	706,160	2.4	...	843.50	220,730	1.5	...	882.40	485,430	3.5	...	825.80
1965–1969.....	148,030	0.5	...	785.40	34,490	0.2	...	821.50	113,540	0.8	...	774.50
Before 1965.....	19,570	0.1	...	695.00	3,190	b	...	705.20	16,380	0.1	...	693.10
2001.....	1,618,610	5.6	5.6	893.70	887,970	5.9	5.9	1,048.20	730,640	5.3	5.3	706.00
2000.....	1,830,810	6.3	12.0	911.20	1,024,120	6.9	12.8	1,061.30	806,690	5.8	11.1	720.70
1999.....	1,605,540	5.6	17.5	880.40	886,420	5.9	18.7	1,023.00	719,120	5.2	16.2	704.50
1998.....	1,493,820	5.2	22.7	862.60	813,540	5.4	24.2	998.30	680,280	4.9	21.1	700.20
1997.....	1,468,780	5.1	27.8	859.80	791,510	5.3	29.5	994.10	677,270	4.9	26.0	702.90
1996.....	1,478,560	5.1	32.9	860.10	775,010	5.2	34.7	988.30	703,550	5.1	31.0	718.80
1995.....	1,378,100	4.8	37.7	864.20	764,730	5.1	39.8	988.00	613,370	4.4	35.4	709.70
1994.....	1,354,500	4.7	42.4	866.00	749,280	5.0	44.8	987.10	605,220	4.4	39.8	716.10
1993.....	1,331,550	4.6	47.0	864.40	742,420	5.0	49.8	980.30	589,130	4.2	44.0	718.30
1992.....	1,320,540	4.6	51.6	866.60	733,470	4.9	54.7	980.80	587,070	4.2	48.2	723.80
1991.....	1,248,070	4.3	55.9	868.30	689,050	4.6	59.3	978.20	559,020	4.0	52.3	732.90
1990.....	1,211,020	4.2	60.1	869.20	656,510	4.4	63.7	977.70	554,510	4.0	56.3	740.70
1989.....	1,149,010	4.0	64.1	861.20	613,150	4.1	67.8	964.20	535,860	3.9	60.1	743.40
1988.....	1,096,070	3.8	67.9	853.90	575,860	3.9	71.7	949.60	520,210	3.7	63.8	747.90
1987.....	1,052,080	3.6	71.6	857.00	547,740	3.7	75.4	947.00	504,340	3.6	67.5	759.20
1986.....	1,020,350	3.5	75.1	852.20	528,090	3.5	78.9	933.20	492,260	3.5	71.0	765.20
1985.....	932,130	3.2	78.3	849.00	475,110	3.2	82.1	917.90	457,020	3.3	74.3	777.40
1984.....	839,210	2.9	81.2	848.80	415,480	2.8	84.9	910.80	423,730	3.0	77.3	788.00
1983.....	795,000	2.8	84.0	867.50	385,130	2.6	87.4	926.30	409,870	2.9	80.3	812.30
1982.....	708,750	2.5	86.4	887.40	336,300	2.3	89.7	947.90	372,450	2.7	83.0	832.80
1981.....	629,460	2.2	88.6	934.80	291,690	2.0	91.6	1,007.40	337,770	2.4	85.4	872.00
1980.....	569,500	2.0	90.6	949.60	250,990	1.7	93.3	1,032.90	318,510	2.3	87.7	883.80
1979.....	495,510	1.7	92.3	957.10	209,510	1.4	94.7	1,046.00	286,000	2.1	89.7	892.00
1978.....	417,220	1.4	93.8	941.30	169,660	1.1	95.9	1,024.50	247,560	1.8	91.5	884.30
1977.....	334,600	1.2	94.9	923.40	135,860	0.9	96.8	1,002.90	198,740	1.4	92.9	869.00
1976.....	320,940	1.1	96.0	898.70	123,140	0.8	97.6	956.10	197,800	1.4	94.4	862.90
1975.....	268,330	0.9	97.0	879.30	99,910	0.7	98.3	926.20	168,420	1.2	95.6	851.50
1974.....	218,500	0.8	97.7	856.50	75,020	0.5	98.8	900.80	143,480	1.0	96.6	833.30
1973.....	177,610	0.6	98.3	847.20	56,720	0.4	99.2	880.30	120,890	0.9	97.5	831.70
1972.....	133,810	0.5	98.8	839.00	40,210	0.3	99.4	875.30	93,600	0.7	98.1	823.30
1971.....	101,620	0.4	99.2	833.10	28,880	0.2	99.6	870.70	72,740	0.5	98.7	818.20
1970.....	74,620	0.3	99.4	818.90	19,900	0.1	99.7	850.10	54,720	0.4	99.1	807.60
1969.....	53,250	0.2	99.6	802.40	13,290	0.1	99.8	839.30	39,960	0.3	99.4	790.10
1968.....	37,400	0.1	99.7	792.60	8,690	0.1	99.9	817.80	28,710	0.2	99.6	784.90
1967.....	26,850	0.1	99.8	772.40	5,970	b	99.9	802.40	20,880	0.2	99.7	763.80
1966.....	18,150	0.1	99.9	755.40	3,890	b	100.0	789.00	14,260	0.1	99.8	746.20
1965.....	12,380	b	100.0	763.40	2,650	b	100.0	835.30	9,730	0.1	100.0	743.90

a. Represents those entitled in specified year or later.  
 b. Less than 0.05 percent.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors and Disability Insurance).  
 ... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

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

**Table 5.B5—Number, average age, and percentage distribution, by age and sex, December 1940–2001, 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
<b>Men</b>									
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
<b>Women</b>									
1940.....	13	68.1	100.0	...	82.6	12.8	3.9	0.6	a
1945.....	71	70.8	100.0	...	47.1	40.0	10.2	2.3	0.3
1950.....	302	71.1	100.0	...	48.4	32.9	15.0	3.2	0.5
1955.....	1,222	71.3	100.0	...	47.8	32.3	14.6	4.4	0.8
1960.....	2,845	71.0	100.0	12.6	36.3	29.0	15.0	5.6	1.6
1965.....	4,276	71.8	100.0	12.2	31.6	28.1	17.6	7.7	2.8
1970.....	5,661	72.0	100.0	11.5	30.1	25.4	18.7	10.0	4.4
1975.....	7,424	72.2	100.0	11.8	30.4	24.2	16.9	10.6	6.1
1980.....	9,101	72.6	100.0	11.2	29.2	24.2	17.1	10.6	7.7
1985.....	10,615	73.3	100.0	11.0	26.9	23.9	17.9	11.4	8.8
1986.....	10,901	73.3	100.0	10.8	26.7	23.8	18.0	11.7	9.0
1987.....	11,145	73.4	100.0	10.7	26.4	23.6	18.1	11.9	9.3
1988.....	11,944	73.5	100.0	10.5	26.0	23.6	18.2	12.2	9.5
1989.....	11,608	73.6	100.0	10.2	26.1	23.1	18.4	12.4	9.8
1990.....	11,842	73.7	100.0	9.9	25.9	23.0	18.5	12.5	10.2
1991.....	12,048	73.9	100.0	9.5	25.4	23.2	18.6	12.7	10.5
1992.....	12,272	74.0	100.0	9.3	25.2	23.1	18.5	12.9	10.9
1993.....	12,447	74.1	100.0	9.0	24.9	23.0	18.6	13.1	11.3
1994.....	12,607	74.2	100.0	9.0	24.3	23.2	18.4	13.4	11.6
1995.....	12,757	74.3	100.0	8.8	24.0	23.2	18.5	13.5	11.9
1996.....	12,887	74.4	100.0	8.7	23.6	22.9	18.8	13.7	12.2
1997.....	13,155	74.5	100.0	8.6	23.2	23.0	19.0	13.8	12.5
1998.....	13,304	74.6	100.0	8.7	22.8	22.8	19.0	13.9	12.8
1999.....	13,453	74.6	100.0	8.8	22.8	22.3	19.3	13.8	13.0
2000.....	13,734	74.6	100.0	8.9	23.4	21.9	19.1	13.8	13.0
2001.....	13,912	74.6	100.0	8.9	23.6	21.6	18.8	13.9	13.1

a. Less than 0.05 percent.

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1940–1987 and 1989 are 100 percent data. All other years are based on a 10 percent sample.

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

... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.B6—Number and percentage distribution with and without reduction for early retirement, by monthly benefit and sex, December 2001

Monthly benefit (dollars) and sex	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers .....	28,841,820	100.0	8,267,740	100.0	20,574,080	100.0
Less than 400.00 .....	2,160,870	7.5	407,940	4.9	1,752,930	8.5
400.00–449.90 .....	924,370	3.2	111,680	1.4	812,690	4.0
450.00–499.90 .....	1,309,700	4.5	202,490	2.4	1,107,210	5.4
500.00–549.90 .....	1,559,330	5.4	253,750	3.1	1,305,580	6.3
550.00–599.90 .....	1,396,480	4.8	287,700	3.5	1,108,780	5.4
600.00–649.90 .....	1,282,070	4.4	314,450	3.8	967,620	4.7
650.00–699.90 .....	1,204,170	4.2	315,680	3.8	888,490	4.3
700.00–749.90 .....	1,181,770	4.1	299,940	3.6	881,830	4.3
750.00–799.90 .....	1,223,430	4.2	301,820	3.7	921,610	4.5
800.00–849.90 .....	1,285,180	4.5	296,490	3.6	988,690	4.8
850.00–899.90 .....	1,402,110	4.9	316,440	3.8	1,085,670	5.3
900.00–949.90 .....	1,554,610	5.4	328,340	4.0	1,226,270	6.0
950.00–999.90 .....	1,562,810	5.4	330,820	4.0	1,231,990	6.0
1,000.00–1,049.90 .....	1,707,550	5.9	347,620	4.2	1,359,930	6.6
1,050.00–1,099.90 .....	1,622,300	5.6	338,520	4.1	1,283,780	6.2
1,100.00–1,149.90 .....	1,333,700	4.6	347,370	4.2	986,330	4.8
1,150.00–1,199.90 .....	1,152,990	4.0	368,940	4.5	784,050	3.8
1,200.00–1,249.90 .....	987,330	3.4	386,380	4.7	600,950	2.9
1,250.00–1,299.90 .....	899,720	3.1	428,970	5.2	470,750	2.3
1,300.00 or more .....	3,091,330	10.7	2,282,400	27.6	808,930	3.9
Average benefit (dollars) .....	874.50		1,038.80		808.40	
Men .....	14,930,060	100.0	4,722,820	100.0	10,207,240	100.0
Less than 400.00 .....	884,200	5.9	187,260	4.0	696,940	6.8
400.00–449.90 .....	263,160	1.8	40,500	0.9	222,660	2.2
450.00–499.90 .....	314,230	2.1	71,400	1.5	242,830	2.4
500.00–549.90 .....	336,410	2.3	82,210	1.7	254,200	2.5
550.00–599.90 .....	357,530	2.4	84,140	1.8	273,390	2.7
600.00–649.90 .....	387,590	2.6	88,940	1.9	298,650	2.9
650.00–699.90 .....	421,030	2.8	92,400	2.0	328,630	3.2
700.00–749.90 .....	468,150	3.1	95,700	2.0	372,450	3.6
750.00–799.90 .....	535,360	3.6	105,590	2.2	429,770	4.2
800.00–849.90 .....	621,800	4.2	114,910	2.4	506,890	5.0
850.00–899.90 .....	729,820	4.9	130,830	2.8	598,990	5.9
900.00–949.90 .....	893,040	6.0	143,960	3.0	749,080	7.3
950.00–999.90 .....	949,920	6.4	156,330	3.3	793,590	7.8
1,000.00–1,049.90 .....	1,138,260	7.6	180,000	3.8	958,260	9.4
1,050.00–1,099.90 .....	1,134,480	7.6	189,070	4.0	945,410	9.3
1,100.00–1,149.90 .....	942,030	6.3	215,590	4.6	726,440	7.1
1,150.00–1,199.90 .....	824,410	5.5	252,600	5.3	571,810	5.6
1,200.00–1,249.90 .....	716,100	4.8	282,760	6.0	433,340	4.2
1,250.00–1,299.90 .....	664,050	4.4	328,690	7.0	335,360	3.3
1,300.00 or more .....	2,348,490	15.7	1,879,940	39.8	468,550	4.6
Average benefit (dollars) .....	984.90		1,166.10		901.10	
Women .....	13,911,760	100.0	3,544,920	100.0	10,366,840	100.0
Less than 400.00 .....	1,276,670	9.2	220,680	6.2	1,055,990	10.2
400.00–449.90 .....	661,210	4.8	71,180	2.0	590,030	5.7
450.00–499.90 .....	995,470	7.2	131,090	3.7	864,380	8.3
500.00–549.90 .....	1,222,920	8.8	171,540	4.8	1,051,380	10.1
550.00–599.90 .....	1,038,950	7.5	203,560	5.7	835,390	8.1
600.00–649.90 .....	894,480	6.4	225,510	6.4	668,970	6.5
650.00–699.90 .....	783,140	5.6	223,280	6.3	559,860	5.4
700.00–749.90 .....	713,620	5.1	204,240	5.8	509,380	4.9
750.00–799.90 .....	688,070	4.9	196,230	5.5	491,840	4.7
800.00–849.90 .....	663,380	4.8	181,580	5.1	481,800	4.6
850.00–899.90 .....	672,290	4.8	185,610	5.2	486,680	4.7
900.00–949.90 .....	661,570	4.8	184,380	5.2	477,190	4.6
950.00–999.90 .....	612,890	4.4	174,490	4.9	438,400	4.2
1,000.00–1,049.90 .....	569,290	4.1	167,620	4.7	401,670	3.9
1,050.00–1,099.90 .....	487,820	3.5	149,450	4.2	338,370	3.3
1,100.00–1,149.90 .....	391,670	2.8	131,780	3.7	259,890	2.5
1,150.00–1,199.90 .....	328,580	2.4	116,340	3.3	212,240	2.0
1,200.00–1,249.90 .....	271,230	1.9	103,620	2.9	167,610	1.6
1,250.00–1,299.90 .....	235,670	1.7	100,280	2.8	135,390	1.3
1,300.00 or more .....	742,840	5.3	402,460	11.4	340,380	3.3
Average benefit (dollars) .....	755.90		869.30		717.10	

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B7—Number and percentage distribution with and without reduction for early retirement, by primary insurance amount and sex, December 2001

Primary insurance amount (dollars) and sex	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers .....	28,841,820	100.0	8,267,740	100.0	20,574,080	100.0
Less than 400.00 .....	3,429,940	11.9	699,930	8.5	2,730,010	13.3
400.00–449.90 .....	772,270	2.7	163,660	2.0	608,610	3.0
450.00–499.90 .....	1,292,830	4.5	295,770	3.6	997,060	4.8
500.00–549.90 .....	1,310,850	4.5	300,270	3.6	1,010,580	4.9
550.00–599.90 .....	1,246,530	4.3	294,990	3.6	951,540	4.6
600.00–649.90 .....	1,239,160	4.3	297,650	3.6	941,510	4.6
650.00–699.90 .....	1,147,290	4.0	287,960	3.5	859,330	4.2
700.00–749.90 .....	1,117,720	3.9	291,130	3.5	826,590	4.0
750.00–799.90 .....	1,081,650	3.8	296,880	3.6	784,770	3.8
800.00–849.90 .....	1,041,560	3.6	298,730	3.6	742,830	3.6
850.00–899.90 .....	1,037,420	3.6	303,740	3.7	733,680	3.6
900.00–949.90 .....	1,047,220	3.6	310,090	3.8	737,130	3.6
950.00–999.90 .....	1,025,730	3.6	303,210	3.7	722,520	3.5
1,000.00–1,049.90 .....	1,075,700	3.7	323,330	3.9	752,370	3.7
1,050.00–1,099.90 .....	1,067,970	3.7	308,650	3.7	759,320	3.7
1,100.00–1,149.90 .....	1,182,410	4.1	333,660	4.0	848,750	4.1
1,150.00–1,199.90 .....	1,292,960	4.5	373,900	4.5	919,060	4.5
1,200.00–1,249.90 .....	1,259,760	4.4	404,130	4.9	855,630	4.2
1,250.00–1,299.90 .....	1,483,520	5.1	474,840	5.7	1,008,680	4.9
1,300.00 or more .....	4,689,330	16.3	1,905,220	23.0	2,784,110	13.5
Average primary insurance amount (dollars) .....	882.70		967.40		848.60	
Men .....	14,930,060	100.0	4,722,820	100.0	10,207,240	100.0
Less than 400.00 .....	694,210	4.6	197,960	4.2	496,250	4.9
400.00–449.90 .....	157,270	1.1	44,200	0.9	113,070	1.1
450.00–499.90 .....	261,190	1.7	78,530	1.7	182,660	1.8
500.00–549.90 .....	282,680	1.9	84,500	1.8	198,180	1.9
550.00–599.90 .....	290,510	1.9	85,880	1.8	204,630	2.0
600.00–649.90 .....	309,370	2.1	89,750	1.9	219,620	2.2
650.00–699.90 .....	316,340	2.1	92,640	2.0	223,700	2.2
700.00–749.90 .....	341,220	2.3	97,660	2.1	243,560	2.4
750.00–799.90 .....	373,160	2.5	107,340	2.3	265,820	2.6
800.00–849.90 .....	406,560	2.7	118,440	2.5	288,120	2.8
850.00–899.90 .....	460,010	3.1	132,520	2.8	327,490	3.2
900.00–949.90 .....	521,370	3.5	147,460	3.1	373,910	3.7
950.00–999.90 .....	577,590	3.9	160,290	3.4	417,300	4.1
1,000.00–1,049.90 .....	670,820	4.5	188,780	4.0	482,040	4.7
1,050.00–1,099.90 .....	736,360	4.9	196,610	4.2	539,750	5.3
1,100.00–1,149.90 .....	899,280	6.0	232,920	4.9	666,360	6.5
1,150.00–1,199.90 .....	1,050,880	7.0	281,160	6.0	769,720	7.5
1,200.00–1,249.90 .....	1,063,470	7.1	323,070	6.8	740,400	7.3
1,250.00–1,299.90 .....	1,286,270	8.6	389,530	8.2	896,740	8.8
1,300.00 or more .....	4,231,500	28.3	1,673,580	35.4	2,557,920	25.1
Average primary insurance amount (dollars) .....	1,080.60		1,124.30		1,060.30	
Women .....	13,911,760	100.0	3,544,920	100.0	10,366,840	100.0
Less than 400.00 .....	2,735,730	19.7	501,970	14.2	2,233,760	21.5
400.00–449.90 .....	615,000	4.4	119,460	3.4	495,540	4.8
450.00–499.90 .....	1,031,640	7.4	217,240	6.1	814,400	7.9
500.00–549.90 .....	1,028,170	7.4	215,770	6.1	812,400	7.8
550.00–599.90 .....	956,020	6.9	209,110	5.9	746,910	7.2
600.00–649.90 .....	929,790	6.7	207,900	5.9	721,890	7.0
650.00–699.90 .....	830,950	6.0	195,320	5.5	635,630	6.1
700.00–749.90 .....	776,500	5.6	193,470	5.5	583,030	5.6
750.00–799.90 .....	708,490	5.1	189,540	5.3	518,950	5.0
800.00–849.90 .....	635,000	4.6	180,290	5.1	454,710	4.4
850.00–899.90 .....	577,410	4.2	171,220	4.8	406,190	3.9
900.00–949.90 .....	525,850	3.8	162,630	4.6	363,220	3.5
950.00–999.90 .....	448,140	3.2	142,920	4.0	305,220	2.9
1,000.00–1,049.90 .....	404,880	2.9	134,550	3.8	270,330	2.6
1,050.00–1,099.90 .....	331,610	2.4	112,040	3.2	219,570	2.1
1,100.00–1,149.90 .....	283,130	2.0	100,740	2.8	182,390	1.8
1,150.00–1,199.90 .....	242,080	1.7	92,740	2.6	149,340	1.4
1,200.00–1,249.90 .....	196,290	1.4	81,060	2.3	115,230	1.1
1,250.00–1,299.90 .....	197,250	1.4	85,310	2.4	111,940	1.1
1,300.00 or more .....	457,830	3.3	231,640	6.5	226,190	2.2
Average primary insurance amount (dollars) .....	670.30		758.50		640.10	

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

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 1956–2001, selected years

Year	Number				Average monthly benefit (dollars)		
	All retired workers	Without reduction for early retirement	With reduction for early retirement		All retired workers	Without reduction for early retirement	With reduction for early retirement
			Number	Percentage of all retired workers			
	<b>Total</b>						
1956	5,112,430	4,997,401	115,029	2.2	63.10	63.40	48.20
1960	8,061,469	7,112,265	949,204	11.8	74.00	76.50	55.80
1965	11,100,584	7,581,386	3,519,198	31.7	83.90	90.10	70.60
1970	13,349,175	7,282,295	6,066,880	45.4	118.10	130.20	103.60
1980	19,562,085	7,397,198	12,164,887	62.2	341.40	391.80	310.70
1985	22,431,930	7,720,959	14,710,971	65.6	478.60	581.20	424.80
1990	24,838,100	7,840,239	16,997,861	68.4	602.60	742.80	537.90
1995	26,672,806	7,941,363	18,731,443	70.2	719.80	885.60	649.50
1996	26,898,072	7,784,078	19,113,994	71.1	745.00	908.70	678.30
1997	27,274,572	7,673,286	19,601,286	71.9	765.00	915.90	705.90
1998	27,510,535	7,699,664	19,810,871	72.0	779.70	932.50	720.30
1999	27,774,677	7,739,557	20,035,120	72.1	804.30	959.20	744.40
2000	28,498,945	8,179,425	20,319,520	71.3	844.50	1,008.40	778.50
2001	28,836,774	8,262,843	20,573,931	71.3	874.40	1,038.70	808.50
	<b>Men</b>						
1956	3,572,271	3,572,271	...	...	68.20	68.20	...
1960	5,216,668	5,216,668	...	...	81.90	81.90	...
1965	6,825,078	5,389,166	1,435,912	21.0	92.60	96.10	79.40
1970	7,688,460	4,930,400	2,758,060	35.9	130.50	139.10	115.30
1980	10,460,735	4,586,539	5,874,196	54.8	380.20	419.60	349.50
1985	11,816,956	4,655,477	7,161,479	60.6	538.40	627.50	480.50
1990	12,983,832	4,592,911	8,390,921	64.6	679.30	803.60	611.20
1995	13,913,531	4,559,535	9,353,996	67.2	810.20	963.70	735.40
1996	14,010,875	4,478,565	9,532,310	68.0	838.10	997.80	763.10
1997	14,116,818	4,371,503	9,745,315	69.0	860.50	1,025.10	786.60
1998	14,200,826	4,371,895	9,828,931	69.2	876.90	1,044.50	802.40
1999	14,321,468	4,385,921	9,935,547	69.4	904.60	1,075.30	829.30
2000	14,767,170	4,690,652	10,076,518	68.2	951.10	1,131.10	867.20
2001	14,930,081	4,719,500	10,210,581	68.4	984.60	1,166.00	900.70
	<b>Women</b>						
1956	1,540,159	1,425,130	115,029	7.5	51.20	51.40	48.20
1960	2,844,801	1,895,597	949,204	33.4	59.70	61.60	55.80
1965	4,275,506	2,192,220	2,083,286	48.7	70.10	75.40	64.50
1970	5,660,715	2,351,895	3,308,820	58.5	101.20	111.70	93.80
1980	9,101,350	2,810,659	6,290,691	69.1	296.80	346.50	274.60
1985	10,614,974	3,065,482	7,549,492	71.1	412.10	511.00	372.00
1990	11,854,268	3,247,328	8,606,940	72.6	518.60	656.80	466.40
1995	12,759,275	3,381,828	9,377,447	73.5	621.20	780.40	563.80
1996	12,887,197	3,305,513	9,581,684	74.4	643.70	788.00	593.90
1997	13,157,754	3,301,783	9,855,971	74.9	662.50	771.30	626.10
1998	13,309,709	3,327,769	9,981,940	75.0	675.90	785.40	639.50
1999	13,453,209	3,353,636	10,099,573	75.1	697.50	807.50	661.00
2000	13,731,775	3,488,773	10,243,002	74.6	729.90	843.40	691.20
2001	13,906,693	3,543,340	10,363,350	74.5	756.20	869.20	717.60

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).  
 . . . = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

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

**Table 5.B9—Number and percentage distribution, by monthly benefit, age, and sex, December 2001**

Monthly benefit (dollars)	Total, 62 or older	62–64	65–69	70–74	75–79	80–84	85–89	90 or older
<b>All retired workers</b>								
Number (thousands).....	28,842	2,570	7,409	6,636	5,472	3,752	2,028	975
Total percent.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00 .....	7.5	9.4	7.9	7.5	7.3	7.1	6.0	7.0
400.00–449.90 .....	3.2	4.3	3.0	3.1	3.4	2.9	2.3	2.5
450.00–499.90 .....	4.5	5.4	4.4	5.0	5.1	3.9	2.9	3.3
500.00–549.90 .....	5.4	7.3	6.2	5.9	4.7	4.2	3.2	3.7
550.00–599.90 .....	4.8	7.4	5.5	4.8	4.3	3.9	3.3	3.7
600.00–649.90 .....	4.4	5.8	4.8	4.5	4.2	3.8	3.4	4.0
650.00–699.90 .....	4.2	4.3	4.6	4.3	3.9	3.8	3.5	4.3
700.00–749.90 .....	4.1	3.9	4.3	4.1	3.9	4.0	3.9	5.0
750.00–799.90 .....	4.2	3.8	4.1	4.0	4.1	4.5	4.9	6.7
800.00–849.90 .....	4.5	3.6	3.9	4.1	4.4	5.3	5.6	7.9
850.00–899.90 .....	4.9	3.6	4.0	4.4	5.0	6.5	6.1	8.2
900.00–949.90 .....	5.4	3.5	4.1	4.7	6.1	8.6	6.2	7.4
950.00–999.90 .....	5.4	3.5	4.1	5.0	7.7	6.2	5.8	6.7
1,000.00–1,049.90 .....	5.9	3.4	4.9	7.3	7.3	5.5	5.6	6.0
1,050.00–1,099.90 .....	5.6	3.4	6.3	7.1	5.0	4.8	4.7	4.6
1,100.00–1,149.90 .....	4.6	5.0	5.9	4.2	3.8	4.4	3.7	3.5
1,150.00–1,199.90 .....	4.0	6.7	4.2	3.2	3.7	4.2	3.2	2.7
1,200.00–1,249.90 .....	3.4	6.2	3.0	2.9	3.5	3.9	2.9	2.0
1,250.00–1,299.90 .....	3.1	4.9	2.8	3.0	3.1	3.1	3.1	1.7
1,300.00 or more .....	10.7	4.5	12.1	10.8	9.4	9.6	19.7	9.1
Average benefit (dollars).....	874.50	806.90	867.90	870.60	871.20	889.00	975.90	880.30
<b>Men</b>								
Number (thousands).....	14,930	1,333	4,125	3,628	2,858	1,812	848	326
Total percent.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00 .....	6.0	6.9	6.1	5.7	5.6	6.2	5.4	6.3
400.00–449.90 .....	1.7	2.1	1.5	1.7	1.8	1.8	1.8	2.2
450.00–499.90 .....	2.1	2.4	1.9	2.1	2.2	2.1	2.0	2.6
500.00–549.90 .....	2.3	2.4	2.1	2.2	2.4	2.3	2.1	2.9
550.00–599.90 .....	2.4	2.5	2.3	2.4	2.4	2.4	2.2	2.8
600.00–649.90 .....	2.6	2.6	2.5	2.6	2.6	2.6	2.4	3.0
650.00–699.90 .....	2.8	2.8	2.8	2.8	2.8	2.9	2.6	3.3
700.00–749.90 .....	3.1	3.0	3.0	3.2	3.2	3.3	2.9	3.9
750.00–799.90 .....	3.6	3.4	3.3	3.5	3.6	3.9	4.0	5.7
800.00–849.90 .....	4.2	3.5	3.7	4.0	4.2	5.2	4.6	7.1
850.00–899.90 .....	4.9	3.9	4.1	4.5	5.2	7.1	5.2	6.9
900.00–949.90 .....	6.0	4.1	4.5	5.2	6.9	11.1	5.5	6.6
950.00–999.90 .....	6.4	4.4	4.9	5.9	10.0	6.8	5.2	6.9
1,000.00–1,049.90 .....	7.6	4.7	6.2	10.0	9.8	6.0	5.4	6.8
1,050.00–1,099.90 .....	7.6	4.9	9.0	10.2	6.1	5.3	4.6	5.6
1,100.00–1,149.90 .....	6.3	7.7	8.8	5.6	4.6	5.2	3.8	4.7
1,150.00–1,199.90 .....	5.5	11.0	6.2	4.2	4.6	5.4	3.5	3.8
1,200.00–1,249.90 .....	4.8	10.8	4.2	3.9	4.5	5.1	3.3	2.7
1,250.00–1,299.90 .....	4.4	8.9	3.9	4.2	4.2	3.9	3.9	2.5
1,300.00 or more .....	15.7	8.2	18.9	16.0	13.2	11.3	29.6	13.9
Average benefit (dollars).....	984.90	962.90	1,000.40	987.20	965.40	951.90	1,080.60	960.90
<b>Women</b>								
Number (thousands).....	13,912	1,237	3,284	3,008	2,614	1,940	1,180	649
Total percent.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00 .....	9.3	12.2	10.1	9.7	9.1	7.8	6.4	7.4
400.00–449.90 .....	4.7	6.7	4.9	4.9	5.1	3.9	2.8	2.6
450.00–499.90 .....	7.2	8.6	7.5	8.5	8.3	5.5	3.6	3.6
500.00–549.90 .....	8.8	12.6	11.4	10.4	7.3	6.0	4.0	4.1
550.00–599.90 .....	7.5	12.6	9.4	7.6	6.3	5.4	4.0	4.1
600.00–649.90 .....	6.4	9.3	7.7	6.8	5.9	4.8	4.2	4.5
650.00–699.90 .....	5.6	6.0	6.9	6.0	5.1	4.5	4.2	4.7
700.00–749.90 .....	5.1	4.9	5.8	5.2	4.7	4.7	4.6	5.6
750.00–799.90 .....	4.9	4.2	5.1	4.6	4.6	5.0	5.5	7.2
800.00–849.90 .....	4.8	3.6	4.2	4.2	4.7	5.4	6.3	8.3
850.00–899.90 .....	4.8	3.2	3.9	4.1	4.9	5.9	6.7	8.9
900.00–949.90 .....	4.8	2.8	3.5	4.1	5.3	6.2	6.6	7.8
950.00–999.90 .....	4.4	2.5	3.2	3.8	5.2	5.6	6.3	6.6
1,000.00–1,049.90 .....	4.1	2.1	3.1	4.0	4.5	5.0	5.7	5.7
1,050.00–1,099.90 .....	3.5	1.8	3.0	3.4	3.7	4.4	4.8	4.1
1,100.00–1,149.90 .....	2.8	2.2	2.3	2.5	3.0	3.6	3.7	2.9
1,150.00–1,199.90 .....	2.4	2.1	1.7	2.1	2.7	3.2	3.0	2.1
1,200.00–1,249.90 .....	1.9	1.3	1.4	1.8	2.4	2.7	2.6	1.6
1,250.00–1,299.90 .....	1.7	0.7	1.3	1.7	1.9	2.3	2.5	1.3
1,300.00 or more .....	5.3	0.6	3.5	4.5	5.3	8.0	12.5	6.8
Average benefit (dollars).....	755.90	639.00	701.40	729.90	768.30	830.10	900.70	839.80

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

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

Table 5.C1—Number and percentage distribution, by type of benefit and primary insurance amount, December 2001

Primary insurance amount (dollars)	Retired workers		Wives and husbands		Children	
	Number	Percent	Number	Percent	Number	Percent
Total .....	28,841,820	100.0	2,737,720	100.0	466,630	100.0
Less than 300.00 .....	1,841,520	6.4	73,600	2.7	13,630	2.9
300.00–349.90 .....	936,860	3.2	31,010	1.1	6,600	1.4
350.00–399.90 .....	651,560	2.3	24,360	0.9	5,890	1.3
400.00–449.90 .....	772,270	2.7	30,070	1.1	6,210	1.3
450.00–499.90 .....	1,292,830	4.5	49,880	1.8	12,800	2.7
500.00–549.90 .....	1,310,850	4.5	50,610	1.8	14,770	3.2
550.00–599.90 .....	1,246,530	4.3	51,910	1.9	16,100	3.5
600.00–649.90 .....	1,239,160	4.3	53,320	1.9	15,930	3.4
650.00–699.90 .....	1,147,290	4.0	53,770	2.0	16,420	3.5
700.00–749.90 .....	1,117,720	3.9	58,300	2.1	16,590	3.6
750.00–799.90 .....	1,081,650	3.8	62,220	2.3	18,700	4.0
800.00–849.90 .....	1,041,560	3.6	66,920	2.4	18,040	3.9
850.00–899.90 .....	1,037,420	3.6	75,600	2.8	19,240	4.1
900.00–949.90 .....	1,047,220	3.6	85,360	3.1	19,130	4.1
950.00–999.90 .....	1,025,730	3.6	92,730	3.4	19,680	4.2
1,000.00–1,049.90 .....	1,075,700	3.7	108,440	4.0	20,510	4.4
1,050.00–1,099.90 .....	1,067,970	3.7	120,820	4.4	20,140	4.3
1,100.00–1,149.90 .....	1,182,410	4.1	158,250	5.8	21,880	4.7
1,150.00–1,199.90 .....	1,292,960	4.5	201,260	7.4	23,210	5.0
1,200.00–1,249.90 .....	1,259,760	4.4	214,060	7.8	23,450	5.0
1,250.00–1,299.90 .....	1,483,520	5.1	257,350	9.4	28,060	6.0
1,300.00–1,349.90 .....	1,409,780	4.9	256,620	9.4	28,700	6.2
1,350.00–1,399.90 .....	1,031,820	3.6	187,780	6.9	21,760	4.7
1,400.00 or more .....	2,247,730	7.8	373,480	13.6	59,190	12.7
Average primary insurance amount (dollars) .....	882.70		1,092.90		997.30	

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

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

Table 5.C2—Average monthly benefit, by type of benefit and sex, December 1940-2001, selected years (in dollars)

Year	Retired workers			Wives			Husbands	Children			
	All	Men	Women	All	Entitled solely 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
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

a. Aged 62 or older. Includes wives aged 65 or older with children.

b. Under age 65 with entitled children in their care.

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

NOTE: . . . = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.



Table 5.D1—Number, percentage, and average monthly benefit, by year of entitlement as disabled worker and sex, December 2001

Year of entitlement	Total				Men				Women			
	Number as of December 2001	Percentage distribution	Cumulative percent-age <sup>a</sup>	Average monthly benefit (dollars)	Number as of December 2001	Percentage distribution	Cumulative percent-age <sup>a</sup>	Average monthly benefit (dollars)	Number as of December 2001	Percentage distribution	Cumulative percent-age <sup>a</sup>	Average monthly benefit (dollars)
All disabled workers.....	5,265,190	100.0	...	814.90	2,951,850	100.0	...	913.80	2,313,340	100.0	...	688.70
2000–2001.....	722,130	13.7	...	909.80	399,200	13.5	...	1032.00	322,930	14.0	...	758.70
1995–1999.....	2,049,830	38.9	...	823.90	1,081,350	36.6	...	940.30	968,480	41.9	...	694.00
1990–1994.....	1,388,680	26.4	...	779.80	769,530	26.1	...	879.30	619,150	26.8	...	656.20
1985–1989.....	572,120	10.9	...	761.40	343,940	11.7	...	839.30	228,180	9.9	...	643.90
1980–1984.....	265,440	5.0	...	731.20	174,990	5.9	...	784.70	90,450	3.9	...	627.60
1975–1979.....	165,190	3.1	...	926.40	111,540	3.8	...	978.00	53,650	2.3	...	819.20
1970–1974.....	80,230	1.5	...	803.70	55,270	1.9	...	831.50	24,960	1.1	...	742.10
1965–1969.....	20,270	0.4	...	673.50	15,060	0.5	...	681.90	5,210	0.2	...	649.30
Before 1965.....	1,300	<sup>b</sup>	...	666.30	970	<sup>b</sup>	...	653.00	330	<sup>b</sup>	...	705.50
2001.....	276,020	5.2	5.2	935.50	157,880	5.3	5.3	1056.30	118,140	5.1	5.1	774.20
2000.....	446,110	8.5	13.7	893.80	241,320	8.2	13.5	1016.00	204,790	8.9	14.0	749.80
1999.....	480,660	9.1	22.8	855.80	253,200	8.6	22.1	975.80	227,460	9.8	23.8	722.30
1998.....	444,360	8.4	31.3	827.20	233,640	7.9	30.0	944.90	210,720	9.1	32.9	696.70
1997.....	401,380	7.6	38.9	811.10	211,060	7.2	37.2	925.20	190,320	8.2	41.1	684.60
1996.....	376,460	7.1	46.1	806.20	200,030	6.8	43.9	922.30	176,430	7.6	48.8	674.50
1995.....	346,970	6.6	52.6	809.70	183,420	6.2	50.2	922.50	163,550	7.1	55.8	683.20
1994.....	330,420	6.3	58.9	803.60	175,810	6.0	56.1	918.60	154,610	6.7	62.5	672.90
1993.....	302,490	5.7	64.7	783.30	165,080	5.6	61.7	891.30	137,410	5.9	68.4	653.60
1992.....	285,960	5.4	70.1	770.30	159,910	5.4	67.1	865.40	126,050	5.4	73.9	649.70
1991.....	259,950	4.9	75.0	763.90	147,690	5.0	72.1	852.40	112,260	4.9	78.7	647.40
1990.....	209,860	4.0	79.0	770.10	121,040	4.1	76.2	857.00	88,820	3.8	82.6	651.60
1989.....	156,120	3.0	82.0	772.50	90,970	3.1	79.3	856.50	65,150	2.8	85.4	655.20
1988.....	126,440	2.4	84.4	776.70	74,760	2.5	81.8	863.10	51,680	2.2	87.6	651.70
1987.....	106,370	2.0	86.4	769.70	64,190	2.2	84.0	849.60	42,180	1.8	89.5	648.10
1986.....	97,160	1.8	88.3	746.00	59,930	2.0	86.0	817.80	37,230	1.6	91.1	630.40
1985.....	86,030	1.6	89.9	725.90	54,090	1.8	87.9	789.30	31,940	1.4	92.5	618.60
1984.....	74,860	1.4	91.3	712.30	48,230	1.6	89.5	768.60	26,630	1.2	93.6	610.20
1983.....	60,120	1.1	92.5	712.70	39,760	1.3	90.9	763.60	20,360	0.9	94.5	613.30
1982.....	49,020	0.9	93.4	717.60	32,580	1.1	92.0	769.60	16,440	0.7	95.2	614.70
1981.....	40,540	0.8	94.2	747.20	26,970	0.9	92.9	800.20	13,570	0.6	95.8	641.90
1980.....	40,900	0.8	94.9	793.30	27,450	0.9	93.8	846.40	13,450	0.6	96.4	685.00
1979.....	37,280	0.7	95.6	909.60	25,140	0.9	94.7	965.80	12,140	0.5	96.9	793.30
1978.....	33,710	0.6	96.3	983.40	22,680	0.8	95.4	1033.60	11,030	0.5	97.4	880.20
1977.....	32,180	0.6	96.9	954.70	21,390	0.7	96.2	1014.70	10,790	0.5	97.8	835.70
1976.....	33,040	0.6	97.5	915.20	22,430	0.8	96.9	967.30	10,610	0.5	98.3	805.00
1975.....	28,980	0.6	98.1	863.30	19,900	0.7	97.6	902.70	9,080	0.4	98.7	776.90
1974.....	24,390	0.5	98.5	841.30	16,640	0.6	98.1	875.30	7,750	0.3	99.0	768.20
1973.....	20,510	0.4	98.9	799.00	13,660	0.5	98.6	834.10	6,850	0.3	99.3	728.90
1972.....	13,790	0.3	99.2	799.50	9,620	0.3	98.9	829.30	4,170	0.2	99.5	730.60
1971.....	12,170	0.2	99.4	789.30	8,630	0.3	99.2	805.20	3,540	0.2	99.6	750.70
1970.....	9,370	0.2	99.6	741.30	6,720	0.2	99.5	754.80	2,650	0.1	99.8	706.80
1969.....	7,230	0.1	99.7	689.90	5,340	0.2	99.6	697.70	1,890	0.1	99.8	668.10
1968.....	9,140	0.2	99.9	645.50	6,750	0.2	99.9	654.40	2,390	0.1	99.9	620.20
1967.....	1,990	<sup>b</sup>	99.9	730.10	1,580	0.1	99.9	743.10	410	<sup>b</sup>	100.0	679.70
1966.....	1,070	<sup>b</sup>	100.0	694.80	790	<sup>b</sup>	99.9	701.80	280	<sup>b</sup>	100.0	674.80
1965.....	840	<sup>b</sup>	100.0	676.90	600	<sup>b</sup>	100.0	663.70	240	<sup>b</sup>	100.0	709.90

a. Represents those entitled in specified year or later.

b. Less than 0.05 percent.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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

... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

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

**Table 5.D2—Number and percentage distribution, by monthly benefit and sex, December 2001**

Monthly benefit (dollars)	Total		Men		Women	
	Number	Percent	Number	Percent	Number	Percent
All disabled workers .....	5,265,190	100.0	2,951,850	100.0	2,313,340	100.0
Less than 300.00 .....	215,960	4.1	72,190	2.4	143,770	6.2
300.00–349.90 .....	106,860	2.0	36,880	1.2	69,980	3.0
350.00–399.90 .....	112,040	2.1	39,280	1.3	72,760	3.1
400.00–449.90 .....	138,760	2.6	51,630	1.7	87,130	3.8
450.00–499.90 .....	292,530	5.6	105,040	3.6	187,490	8.1
500.00–549.90 .....	356,120	6.8	138,090	4.7	218,030	9.4
550.00–599.90 .....	358,040	6.8	149,620	5.1	208,420	9.0
600.00–649.90 .....	352,980	6.7	158,490	5.4	194,490	8.4
650.00–699.90 .....	329,990	6.3	157,530	5.3	172,460	7.5
700.00–749.90 .....	309,030	5.9	158,580	5.4	150,450	6.5
750.00–799.90 .....	284,100	5.4	152,460	5.2	131,640	5.7
800.00–849.90 .....	260,520	4.9	148,090	5.0	112,430	4.9
850.00–899.90 .....	239,960	4.6	144,390	4.9	95,570	4.1
900.00–949.90 .....	221,720	4.2	139,370	4.7	82,350	3.6
950.00–999.90 .....	199,100	3.8	130,870	4.4	68,230	2.9
1,000.00–1,049.90 .....	184,890	3.5	127,050	4.3	57,840	2.5
1,050.00–1,099.90 .....	162,470	3.1	114,850	3.9	47,620	2.1
1,100.00–1,149.90 .....	146,870	2.8	108,780	3.7	38,000	1.6
1,150.00–1,199.90 .....	136,760	2.6	104,980	3.6	31,780	1.4
1,200.00–1,249.90 .....	129,620	2.5	101,740	3.4	27,880	1.2
1,250.00–1,299.90 .....	150,450	2.9	121,510	4.1	28,940	1.3
1,300.00–1,349.90 .....	145,110	2.8	119,730	4.1	25,380	1.1
1,350.00–1,399.90 .....	122,380	2.3	103,330	3.5	19,050	0.8
1,400.00 or more .....	309,020	5.9	267,370	9.1	41,650	1.8
Average benefit (dollars) .....	814.90		913.80		688.70	

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

**Table 5.D3—Number and monthly benefits, by sex, December 1957–2001, selected years**

Year	Total		Men		Women	
	Number	Monthly benefits (thousands of dollars)	Number	Monthly benefits (thousands of dollars)	Number	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

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: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D4—Number, average age, and percentage distribution, by age and sex, December 1957–2001, selected years

Year	Total <sup>a</sup> (thousands)	Average age	Percentage distribution							
			Total	Under 30	30–39	40–44	45–49	50–54	55–59	60–64
<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
<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

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

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1988 and 1990–2001 are based on a 10 percent sample. All other years are 100 percent data.

NOTE: ... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D4.1—Number and percentage distribution of disabled beneficiaries, by type of beneficiary and diagnostic group, December 2001

Diagnostic group	Total	Disabled workers	Disabled adult children	Disabled widow(er)s
Total number .....	6,208,670	5,267,884	736,531	204,255
Number with diagnosis available .....	5,935,637	5,217,345	<sup>a</sup> 518,746	199,546
Infectious and parasitic diseases <sup>b</sup> .....	104,928	100,437	2,746	1,745
Neoplasms .....	148,638	142,760	1,678	4,200
Endocrine, nutritional, and metabolic diseases .....	262,545	239,610	2,744	20,191
Diseases of blood and blood-forming organs .....	14,961	12,847	1,768	346
Mental disorders				
Mental retardation .....	595,675	273,850	312,248	9,577
Other .....	1,591,094	1,458,016	89,854	43,224
Diseases of the—				
Nervous system and sense organs .....	579,860	505,146	60,574	14,140
Circulatory system .....	569,329	543,509	3,080	22,740
Respiratory system .....	182,500	170,377	902	11,221
Digestive system .....	77,337	74,673	503	2,161
Genitourinary system .....	92,419	88,945	1,695	1,779
Skin and subcutaneous tissue .....	13,548	12,787	248	513
Musculoskeletal system and connective tissue .....	1,289,045	1,231,143	4,346	53,556
Congenital anomalies .....	15,409	8,752	6,395	262
Injuries .....	255,979	242,279	8,613	5,087
Other .....	142,370	112,214	21,352	8,804
Percentage distribution with diagnosis available .....	100.0	100.0	100.0	100.0
Infectious and parasitic diseases <sup>b</sup> .....	1.8	1.9	0.5	0.9
Neoplasms .....	2.5	2.7	0.3	2.1
Endocrine, nutritional, and metabolic diseases .....	4.4	4.6	0.5	10.1
Diseases of blood and blood-forming organs .....	0.3	0.2	0.3	0.2
Mental disorders				
Mental retardation .....	10.0	5.2	60.2	4.8
Other .....	26.8	27.9	17.3	21.7
Diseases of the—				
Nervous system and sense organs .....	9.8	9.7	11.7	7.1
Circulatory system .....	9.6	10.4	0.6	11.4
Respiratory system .....	3.1	3.3	0.2	5.6
Digestive system .....	1.3	1.4	0.1	1.1
Genitourinary system .....	1.6	1.7	0.3	0.9
Skin and subcutaneous tissue .....	0.2	0.2	<sup>c</sup>	0.3
Musculoskeletal system and connective tissue .....	21.7	23.6	0.8	26.8
Congenital anomalies .....	0.3	0.2	1.2	0.1
Injuries .....	4.3	4.6	1.7	2.5
Other .....	2.4	2.2	4.1	4.4

a. The diagnosis for disabled children typically was not recorded on the Master Beneficiary Record (MBR) until 1984. Many beneficiaries entitled before that date are still on the rolls today.

b. AIDS/HIV records are counted in the Infectious and parasitic diseases group. Before 1990, those records were included in the Other group.

c. Less than 0.05 percent.

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

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

Table 5.D5—Number and percentage distribution, by diagnostic group, and sex, December 2001

Diagnostic group	Number			Percentage distribution		
	Total	Men	Women	Total	Men	Women
Total number.....	5,267,884	2,947,745	2,320,139	...	...	...
Number with diagnosis available.....	5,217,345	2,913,523	2,303,822	100.0	100.0	100.0
Infectious and parasitic diseases <sup>a</sup> .....	100,437	76,389	24,048	1.9	2.6	1.0
Neoplasms.....	142,760	69,835	72,925	2.7	2.4	3.2
Endocrine, nutritional, and metabolic diseases.....	239,610	98,452	141,158	4.6	3.4	6.1
Diseases of blood and blood-forming organs.....	12,847	6,089	6,758	0.2	0.2	0.3
Mental disorders						
Mental retardation.....	273,850	182,088	91,762	5.2	6.2	4.0
Other.....	1,458,016	772,612	685,404	27.9	26.5	29.8
Diseases of the—						
Nervous system and sense organs.....	505,146	259,440	245,706	9.7	8.9	10.7
Circulatory system.....	543,509	371,201	172,308	10.4	12.7	7.5
Respiratory system.....	170,377	88,523	81,854	3.3	3.0	3.6
Digestive system.....	74,673	40,872	33,801	1.4	1.4	1.5
Genitourinary system.....	88,945	54,102	34,843	1.7	1.9	1.5
Skin and subcutaneous tissue.....	12,787	5,319	7,468	0.2	0.2	0.3
Musculoskeletal system and connective tissue.....	1,231,143	655,479	575,664	23.6	22.5	25.0
Congenital anomalies.....	8,752	4,644	4,108	0.2	0.2	0.2
Injuries.....	242,279	173,097	69,182	4.6	5.9	3.0
Other.....	112,214	55,381	56,833	2.2	1.9	2.5

a. AIDS/HIV records are counted in the Infectious and parasitic diseases group. Before 1990, these records were included in the Other group.

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: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

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

**Table 5.D6—Number and percentage distribution, by diagnostic group, age, and sex, December 2001**

Diagnostic group	All ages	Under 30	30–39	40–44	45–49	50–54	55–59	60–64
Total number.....	5,267,884	149,350	586,817	585,782	744,985	932,812	1,093,573	1,174,565
Number with diagnosis available.....	5,217,345	148,629	585,388	583,004	738,725	924,118	1,083,412	1,154,069
Percentage distribution with diagnosis available.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Infectious and parasitic diseases <sup>a</sup> .....	1.9	1.3	4.1	3.5	2.6	1.7	1.0	0.8
Neoplasms.....	2.7	2.5	1.9	2.1	2.4	2.8	3.1	3.4
Endocrine, nutritional, and metabolic diseases.....	4.6	1.9	3.1	3.6	4.4	5.2	5.4	5.1
Diseases of blood and blood-forming organs.....	0.2	1.0	0.5	0.3	0.2	0.2	0.2	0.1
Mental disorders								
Mental retardation.....	5.2	18.9	11.4	7.6	6.0	4.2	2.8	1.9
Other.....	27.9	42.0	39.9	38.1	35.2	30.4	21.3	14.6
Diseases of the—								
Nervous system and sense organs.....	9.7	11.8	11.4	10.4	10.3	9.8	9.1	8.2
Circulatory system.....	10.4	1.9	2.7	3.9	6.0	9.4	14.3	18.7
Respiratory system.....	3.3	0.7	1.0	1.3	1.8	2.7	4.5	6.0
Digestive system.....	1.4	1.0	1.2	1.6	1.9	1.6	1.3	1.2
Genitourinary system.....	1.7	2.9	2.4	2.0	1.9	1.8	1.4	1.1
Skin and subcutaneous tissue.....	0.2	0.2	0.3	0.3	0.3	0.3	0.2	0.2
Musculoskeletal system and connective tissue.....	23.6	4.4	11.6	17.4	19.9	23.3	29.3	32.5
Congenital anomalies.....	0.2	0.7	0.3	0.2	0.1	0.1	0.1	0.1
Injuries.....	4.6	7.0	6.2	5.5	4.7	4.3	3.9	4.1
Other.....	2.2	1.7	2.0	2.2	2.3	2.3	2.2	2.0
Total number, men.....	2,947,745	85,524	328,352	329,152	412,425	515,859	603,655	672,778
Number with diagnosis available.....	2,913,523	85,100	327,508	327,229	408,046	509,747	596,749	659,144
Percentage distribution with diagnosis available.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Infectious and parasitic diseases <sup>a</sup> .....	2.6	1.5	6.0	5.2	3.7	2.2	1.2	0.8
Neoplasms.....	2.4	2.4	1.6	1.6	1.9	2.3	2.8	3.2
Endocrine, nutritional, and metabolic diseases.....	3.4	1.4	2.4	2.8	3.3	3.8	4.0	3.7
Diseases of blood and blood-forming organs.....	0.2	0.8	0.4	0.2	0.2	0.2	0.1	0.1
Mental disorders								
Mental retardation.....	6.2	19.8	13.1	9.2	7.3	5.2	3.5	2.3
Other.....	26.5	42.7	38.4	36.3	33.5	30.0	19.8	12.8
Diseases of the—								
Nervous system and sense organs.....	8.9	11.1	10.0	9.1	9.2	9.0	8.5	8.0
Circulatory system.....	12.7	1.8	2.8	4.3	7.0	11.3	18.0	23.2
Respiratory system.....	3.0	0.4	0.7	1.0	1.4	2.3	4.3	6.0
Digestive system.....	1.4	0.7	1.0	1.5	2.0	1.7	1.3	1.2
Genitourinary system.....	1.9	2.9	2.6	2.2	2.2	1.9	1.5	1.2
Skin and subcutaneous tissue.....	0.2	0.1	0.2	0.2	0.2	0.2	0.2	0.2
Musculoskeletal system and connective tissue.....	22.5	3.1	10.6	17.1	19.7	22.3	27.9	30.5
Congenital anomalies.....	0.2	0.6	0.3	0.2	0.1	0.1	0.1	0.1
Injuries.....	5.9	9.1	8.3	7.3	6.2	5.6	4.9	4.8
Other.....	1.9	1.6	1.7	1.8	1.9	2.0	2.0	1.9
Total number, women.....	2,320,139	63,826	258,465	256,630	332,560	416,953	489,918	501,787
Number with diagnosis available.....	2,303,822	63,529	257,880	255,775	330,679	414,371	486,663	494,925
Percentage distribution with diagnosis available.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Infectious and parasitic diseases <sup>a</sup> .....	1.0	1.1	1.6	1.4	1.2	1.0	0.8	0.7
Neoplasms.....	3.2	2.6	2.3	2.6	3.0	3.4	3.5	3.6
Endocrine, nutritional, and metabolic diseases.....	6.1	2.6	3.9	4.7	5.7	7.0	7.2	7.0
Diseases of blood and blood-forming organs.....	0.3	1.2	0.6	0.3	0.3	0.2	0.2	0.2
Mental disorders								
Mental retardation.....	4.0	17.7	9.3	5.7	4.4	2.9	1.9	1.3
Other.....	29.8	41.0	41.8	40.4	37.2	30.9	23.1	17.1
Diseases of the—								
Nervous system and sense organs.....	10.7	12.9	13.1	12.0	11.7	10.9	9.7	8.4
Circulatory system.....	7.5	2.0	2.6	3.5	4.7	7.0	9.9	12.7
Respiratory system.....	3.6	1.1	1.4	1.7	2.2	3.2	4.8	6.0
Digestive system.....	1.5	1.5	1.6	1.7	1.7	1.5	1.3	1.2
Genitourinary system.....	1.5	3.0	2.3	1.8	1.6	1.5	1.2	1.0
Skin and subcutaneous tissue.....	0.3	0.4	0.4	0.4	0.4	0.3	0.3	0.3
Musculoskeletal system.....	25.0	6.2	13.0	17.7	20.1	24.6	31.0	35.1
Congenital anomalies.....	0.2	0.7	0.3	0.2	0.2	0.1	0.1	0.1
Injuries.....	3.0	4.1	3.6	3.2	2.8	2.6	2.7	3.2
Other.....	2.5	1.8	2.4	2.7	2.7	2.7	2.4	2.2

a. AIDS/HIV records are counted in the Infectious and parasitic diseases group. Before 1990, those records were included in the Other group.

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

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

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

Table 5.E1—Number and percentage distribution, by type of benefit and primary insurance amount, December 2001

Primary insurance amount (dollars)	Disabled workers		Spouses		Children	
	Number	Percent	Number	Percent	Number	Percent
Total .....	5,265,190	100.0	157,430	100.0	1,490,420	100.0
Less than 300.00 .....	201,250	3.8	50	a	480	a
300.00–349.90 .....	109,240	2.1	230	0.1	1,650	0.1
350.00–399.90 .....	109,590	2.1	90	0.1	1,100	0.1
400.00–449.90 .....	133,810	2.5	290	0.2	2,870	0.2
450.00–499.90 .....	295,340	5.6	2,690	1.7	46,890	3.1
500.00–549.90 .....	357,570	6.8	6,250	4.0	106,150	7.1
550.00–599.90 .....	356,780	6.8	7,680	4.9	122,330	8.2
600.00–649.90 .....	348,710	6.6	8,160	5.2	122,860	8.2
650.00–699.90 .....	326,940	6.2	9,180	5.8	120,650	8.1
700.00–749.90 .....	306,290	5.8	8,710	5.5	110,500	7.4
750.00–799.90 .....	282,420	5.4	9,050	5.7	102,270	6.9
800.00–849.90 .....	260,940	5.0	8,310	5.3	95,310	6.4
850.00–899.90 .....	239,740	4.6	7,860	5.0	86,670	5.8
900.00–949.90 .....	221,860	4.2	7,960	5.1	77,270	5.2
950.00–999.90 .....	199,650	3.8	7,300	4.6	66,790	4.5
1,000.00–1,049.90 .....	186,070	3.5	6,920	4.4	60,040	4.0
1,050.00–1,099.90 .....	164,580	3.1	6,380	4.1	49,930	3.4
1,100.00–1,149.90 .....	149,110	2.8	6,220	4.0	43,960	2.9
1,150.00–1,199.90 .....	138,710	2.6	6,250	4.0	39,190	2.6
1,200.00–1,249.90 .....	131,920	2.5	6,190	3.9	35,050	2.4
1,250.00–1,299.90 .....	154,140	2.9	7,790	4.9	39,540	2.7
1,300.00–1,349.90 .....	148,420	2.8	8,100	5.1	39,280	2.6
1,350.00–1,399.90 .....	125,170	2.4	6,980	4.4	30,600	2.1
1,400.00 or more .....	316,940	6.0	18,790	11.9	89,040	6.0
Average primary insurance amount (dollars) .....	820.30		993.90		867.30	

a. Less than 0.05 percent.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.E2—Average monthly benefit, by type of benefit, age, and sex, December 1957–2001, 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
1986 .....	487.90	539.20	383.90	131.40	101.20	141.40	138.40	186.70	201.60
1987 .....	508.20	562.50	399.70	135.80	86.10	146.40	143.00	195.70	213.40
1988 .....	529.50	587.00	416.40	139.70	86.60	150.90	146.70	205.00	228.00
1989 .....	556.00	617.10	438.20	145.50	91.50	156.70	151.90	218.20	240.60
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

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

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 1950–2001, selected years

Year	Total		Wives entitled solely because of age <sup>a</sup>		Wives entitled because of children <sup>b</sup>						Husbands	
					Total		With at least 1 child under age 16 <sup>c</sup>		With at least 1 disabled child <sup>d</sup>			
	Number	Benefit (thousands of dollars)	Number	Benefit (thousands of dollars)	Number	Benefit (thousands of dollars)	Number	Benefit (thousands of dollars)	Number	Benefit (thousands of dollars)	Number	Benefit (thousands of dollars)
<b>Wives and husbands of retired workers</b>												
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
<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	1,182	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

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.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana Nichelle Mercer (410) 966-6377.



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

**Table 5.F3.—Number and percentage distribution of wives with entitlement based on age, by monthly benefit and age, December 2001**

Monthly benefit (dollars)	Total, 62 or older	62–64	65–69	70–74	75–79	80–84	85 or older
Total number.....	2,700,150	319,500	742,020	713,970	531,820	280,350	112,490
Total percent.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 150.00.....	5.6	10.2	6.3	4.6	4.4	4.1	3.4
150.00–174.90.....	1.6	1.9	1.6	1.4	1.5	1.5	2.1
175.00–199.90.....	2.1	2.7	2.2	1.9	1.9	1.8	1.6
200.00–224.90.....	2.2	2.6	2.3	2.0	2.1	1.9	1.9
225.00–249.90.....	2.5	2.8	2.4	2.4	2.5	2.3	2.5
250.00–274.90.....	2.6	3.1	2.6	2.5	2.5	2.4	2.5
275.00–299.90.....	2.7	2.9	2.8	2.6	2.6	2.7	2.6
300.00–324.90.....	3.0	3.1	3.0	2.9	3.0	2.9	3.1
325.00–349.90.....	3.4	3.5	3.5	3.3	3.4	3.4	3.6
350.00–374.90.....	3.8	3.8	3.6	3.8	3.8	4.0	5.6
375.00–399.90.....	4.3	3.9	3.9	4.3	4.6	5.0	5.9
400.00–424.90.....	5.3	4.6	4.5	5.1	6.5	6.4	6.4
425.00–449.90.....	7.2	4.8	5.2	7.1	11.1	8.3	6.0
450.00–474.90.....	8.0	5.7	6.2	9.2	10.9	7.4	5.4
475.00–499.90.....	9.5	8.4	10.1	12.3	7.6	8.1	4.7
500.00–524.90.....	8.0	9.7	10.5	8.6	4.6	5.6	4.5
525.00–549.90.....	5.5	8.7	7.1	4.3	3.8	4.9	4.1
550.00–574.90.....	4.0	6.6	3.9	3.1	3.4	4.4	4.4
575.00–599.90.....	3.3	4.3	2.7	3.0	3.2	4.2	4.0
600.00–624.90.....	2.8	2.7	2.3	2.6	3.1	4.3	3.3
625.00–649.90.....	2.7	1.5	2.4	2.6	3.3	3.4	3.5
650.00–674.90.....	2.3	1.0	2.2	2.4	2.8	2.5	3.4
675.00–699.90.....	1.9	0.6	2.1	2.1	2.3	1.5	2.6
700.00 or more.....	5.7	0.7	6.6	5.8	4.9	7.0	12.9
Average benefit (dollars).....	444.60	404.20	443.90	447.80	445.50	464.70	488.50

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana Nichelle Mercer (410) 966-6377.

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

Table 5.F4—Number of children and total monthly benefit, by type of benefit, December 1940–2001, selected years

Year	Number of children of—				Monthly benefit 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
1996	3,802,791	442,567	1,897,667	1,462,557	1,356,685	149,177	924,491	283,017
1997	3,771,774	441,121	1,892,707	1,437,946	1,389,552	153,949	946,325	289,278
1998	3,768,928	438,726	1,883,794	1,446,408	1,417,362	157,230	959,939	300,194
1999	3,794,795	442,016	1,884,803	1,467,976	1,473,988	164,755	991,963	317,270
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
<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
1996	3,010,100	241,911	1,391,095	1,377,094	997,075	73,297	665,269	258,509
1997	2,969,909	240,031	1,376,186	1,353,692	1,014,245	75,573	674,451	264,221
1998	2,962,704	238,455	1,363,444	1,360,805	1,031,690	77,334	680,264	274,092
1999	2,970,039	240,899	1,353,918	1,375,222	1,066,979	81,648	697,212	288,119
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
<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
1996	696,787	189,788	454,367	52,632	316,579	71,808	229,947	14,824
1997	704,709	189,780	461,974	52,955	330,258	73,984	240,802	15,472
1998	712,772	189,637	468,705	54,430	341,731	75,663	249,726	16,342
1999	720,526	189,815	474,804	55,907	357,099	78,391	261,339	17,369
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
<b>Students</b>								
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
1996	95,904	10,868	52,205	32,831	43,032	4,072	29,276	9,684
1997	97,156	11,310	54,547	31,299	45,049	4,393	31,071	9,585
1998	93,452	10,634	51,645	31,173	43,941	4,233	29,949	9,759
1999	104,230	11,302	56,081	36,847	49,910	4,716	33,412	11,782
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

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana Nichelle Mercer (410) 966-6377.

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

Table 5.F6—Average monthly benefit for survivors, by type of benefit, December 1940–2001, 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	338.30	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
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

a. Children's data estimated for 1977.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana Nichelle Mercer (410) 966-6377.

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

**Table 5.F7—Number and percentage distribution of survivors, by type of benefit and primary insurance amount, December 2001**

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 .....	195,160	100.0	4,624,690	100.0	2,650	100.0	202,020	100.0	1,890,280	100.0
Less than 300.00 .....	4,890	2.5	36,410	0.8	30	1.1	2,590	1.3	93,180	4.9
300.00–349.90 .....	2,070	1.1	97,920	2.1	40	1.5	2,210	1.1	60,400	3.2
350.00–399.90 .....	2,240	1.1	46,110	1.0	10	0.4	1,900	0.9	42,100	2.2
400.00–449.90 .....	2,490	1.3	56,980	1.2	30	1.1	2,160	1.1	44,150	2.3
450.00–499.90 .....	5,630	2.9	96,900	2.1	50	1.9	4,780	2.4	87,800	4.6
500.00–549.90 .....	7,210	3.7	108,830	2.4	210	7.9	5,790	2.9	103,190	5.5
550.00–599.90 .....	7,920	4.1	114,070	2.5	140	5.3	6,210	3.1	104,980	5.6
600.00–649.90 .....	8,380	4.3	123,440	2.7	100	3.8	7,060	3.5	103,830	5.5
650.00–699.90 .....	8,360	4.3	128,330	2.8	150	5.7	7,930	3.9	102,760	5.4
700.00–749.90 .....	8,600	4.4	155,020	3.4	160	6.0	8,560	4.2	101,930	5.4
750.00–799.90 .....	9,480	4.9	167,880	3.6	150	5.7	9,060	4.5	96,730	5.1
800.00–849.90 .....	10,110	5.2	219,940	4.8	170	6.4	9,700	4.8	101,420	5.4
850.00–899.90 .....	9,950	5.1	286,680	6.2	150	5.7	10,110	5.0	98,690	5.2
900.00–949.90 .....	9,420	4.8	292,620	6.3	120	4.5	10,950	5.4	88,140	4.7
950.00–999.90 .....	8,860	4.5	291,150	6.3	80	3.0	10,840	5.4	76,090	4.0
1,000.00–1,049.90 .....	9,140	4.7	315,660	6.8	130	4.9	11,760	5.8	73,060	3.9
1,050.00–1,099.90 .....	7,750	4.0	267,000	5.8	60	2.3	10,610	5.3	62,920	3.3
1,100.00–1,149.90 .....	7,890	4.0	298,940	6.5	60	2.3	10,470	5.2	59,240	3.1
1,150.00–1,199.90 .....	7,050	3.6	320,820	6.9	150	5.7	10,960	5.4	54,070	2.9
1,200.00–1,249.90 .....	7,150	3.7	290,310	6.3	140	5.3	9,640	4.8	50,280	2.7
1,250.00–1,299.90 .....	8,000	4.1	298,210	6.4	100	3.8	12,740	6.3	53,550	2.8
1,300.00–1,349.90 .....	7,890	4.0	234,720	5.1	170	6.4	11,060	5.5	49,890	2.6
1,350.00–1,399.90 .....	6,690	3.4	133,590	2.9	80	3.0	8,560	4.2	40,720	2.2
1,400.00 or more .....	27,990	14.3	243,160	5.3	170	6.4	16,370	8.1	141,160	7.5

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana Nichelle Mercer (410) 966-6377.

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

Table 5.F8—Number of widow(er)s and total monthly benefit, by type of benefit, December 1950–2001

Year	Total		Nondisabled—				Disabled widow(er)s	
			Widows		Widowers			
	Number	Benefit (thousands of dollars)	Number	Benefit (thousands of dollars)	Number	Benefit (thousands of dollars)	Number	Benefit (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
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

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

NOTE: . . . = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana Nichelle Mercer (410) 966-6377.

## 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 2001**

Year of entitlement	Number as of December 2001	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)
Total.....	4,624,690	100.0	...	840.80
2000–2001.....	568,190	12.3	...	903.50
1995–1999.....	1,237,550	26.8	...	891.90
1990–1994.....	991,200	21.4	...	871.80
1985–1989.....	805,080	17.4	...	823.00
1980–1984.....	558,050	12.1	...	767.30
1975–1979.....	280,940	6.1	...	700.50
1970–1974.....	133,960	2.9	...	654.90
1965–1969.....	45,340	1.0	...	642.60
Before 1965.....	4,380	0.1	...	620.10
2001.....	274,140	5.9	5.9	905.30
2000.....	294,050	6.4	12.3	901.80
1999.....	276,930	6.0	18.3	891.90
1998.....	263,360	5.7	24.0	893.20
1997.....	246,220	5.3	29.3	890.80
1996.....	229,500	5.0	34.3	893.90
1995.....	221,540	4.8	39.0	889.80
1994.....	214,690	4.6	43.7	888.60
1993.....	206,660	4.5	48.2	879.70
1992.....	197,350	4.3	52.4	875.20
1991.....	188,060	4.1	56.5	860.60
1990.....	184,440	4.0	60.5	850.90
1989.....	173,860	3.8	64.2	843.30
1988.....	168,230	3.6	67.9	833.70
1987.....	161,250	3.5	71.4	824.60
1986.....	156,360	3.4	74.7	809.50
1985.....	145,380	3.1	77.9	799.10
1984.....	136,340	2.9	80.8	788.10
1983.....	125,010	2.7	83.5	772.70
1982.....	109,740	2.4	85.9	769.30
1981.....	101,520	2.2	88.1	752.10
1980.....	85,440	1.8	90.0	741.80
1979.....	75,220	1.6	91.6	726.10
1978.....	63,340	1.4	92.9	715.70
1977.....	49,290	1.1	94.0	698.50
1976.....	50,030	1.1	95.1	671.80
1975.....	43,060	0.9	96.0	668.70
1974.....	36,750	0.8	96.8	665.40
1973.....	31,640	0.7	97.5	655.70
1972.....	25,790	0.6	98.1	649.80
1971.....	22,160	0.5	98.5	646.10
1970.....	17,620	0.4	98.9	650.00
1969.....	13,190	0.3	99.2	654.70
1968.....	11,150	0.2	99.5	643.10
1967.....	8,340	0.2	99.6	639.40
1966.....	5,960	0.1	99.8	632.40
1965.....	6,700	0.1	99.9	630.70

a. Represents those entitled in specified year or later.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana Nichelle Mercer (410) 966-6377.

**Table 5.F10—Number, percentage, and average monthly benefit, by year of entitlement as disabled widow(er), December 2001**

Year of entitlement	Number as of December 2001	Percentage distribution	Cumulative percentage <sup>a</sup>	Average monthly benefit (dollars)
Total.....	202,020	100.0	...	535.20
2000–2001.....	35,020	17.3	...	534.10
1995–1999.....	107,840	53.4	...	533.10
1991–1995.....	53,270	26.4	...	539.70
1987–1990.....	5,890	2.9	...	540.00
2001.....	13,600	6.7	6.7	530.90
2000.....	21,420	10.6	17.3	536.00
1999.....	24,520	12.1	29.5	548.10
1998.....	22,830	11.3	40.8	532.00
1997.....	22,530	11.2	51.9	525.30
1996.....	21,000	10.4	62.3	525.00
1995.....	16,960	8.4	70.7	533.40
1994.....	15,840	7.8	78.6	535.70
1993.....	12,740	6.3	84.9	530.40
1992.....	10,310	5.1	90.0	544.80
1991.....	10,530	5.2	95.2	540.40
1990.....	3,850	1.9	97.1	572.10
1989.....	2,930	1.5	98.5	542.10
1988.....	1,810	0.9	99.4	529.50
1987.....	1,150	0.6	100.0	551.40

a. Represents those entitled in specified year or later.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana Nichelle Mercer (410) 966-6377.

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

Table 5.F11—Number and percentage distribution of nondisabled widows, by monthly benefit and age, December 2001

Monthly benefit (dollars)	Total, 60 or older	60–61	62–64	65–69	70–74	75–79	80–84	85–89	90 or older
Total number .....	4,586,220	125,390	309,270	672,810	770,290	912,010	826,950	573,660	395,840
Total percent .....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 300.00 .....	3.1	3.3	4.1	3.2	3.5	3.4	3.0	2.8	1.2
300.00–349.90 .....	2.0	1.3	1.3	1.4	1.5	1.8	2.1	2.5	4.6
350.00–399.90 .....	2.2	2.5	2.3	2.0	2.1	2.3	2.2	2.3	2.0
400.00–449.90 .....	2.5	2.9	2.9	2.4	2.4	2.5	2.4	2.7	2.9
450.00–499.90 .....	3.1	3.3	3.2	2.9	2.8	3.0	3.0	3.3	4.0
500.00–549.90 .....	3.4	3.6	3.2	3.1	3.1	3.4	3.4	3.6	4.2
550.00–599.90 .....	4.0	4.2	3.7	3.7	3.7	3.9	4.1	4.6	4.6
600.00–649.90 .....	4.9	5.0	4.6	4.3	4.3	4.9	5.1	5.9	5.0
650.00–699.90 .....	5.7	5.4	5.2	5.0	5.2	5.6	5.9	6.4	6.7
700.00–749.90 .....	6.2	6.0	6.0	5.5	5.7	6.3	6.3	6.4	8.0
750.00–799.90 .....	6.7	6.2	6.8	6.4	6.4	6.5	6.3	6.7	9.1
800.00–849.90 .....	7.0	6.4	6.8	6.9	7.2	7.5	6.2	6.6	8.3
850.00–899.90 .....	7.7	7.6	7.8	7.9	8.6	8.1	6.8	6.6	8.6
900.00–949.90 .....	7.9	8.5	9.5	10.0	8.9	7.5	6.8	5.9	6.8
950.00–999.90 .....	8.0	9.4	11.0	9.4	7.9	8.0	7.4	6.7	6.8
1,000.00–1,049.90 .....	4.5	6.6	6.0	4.7	4.8	4.3	4.1	3.8	3.7
1,050.00–1,099.90 .....	4.7	6.9	5.7	5.2	5.5	4.5	4.6	4.0	3.0
1,100.00–1,149.90 .....	3.4	4.9	4.0	4.1	3.7	3.4	3.4	3.0	1.7
1,150.00–1,199.90 .....	2.8	3.7	2.5	3.0	3.1	3.1	2.9	2.5	1.4
1,200.00–1,249.90 .....	2.2	1.5	1.4	2.2	2.7	2.6	2.5	1.8	1.0
1,250.00–1,299.90 .....	2.0	0.5	0.9	2.3	2.4	2.0	2.4	2.0	1.0
1,300.00–1,349.90 .....	1.4	0.2	0.5	1.6	1.5	1.3	1.8	1.9	0.9
1,350.00–1,399.90 .....	1.0	0.1	0.3	1.0	0.9	0.9	1.5	1.6	0.8
1,400.00 or more .....	3.4	0.1	0.5	1.6	2.2	3.2	5.9	6.3	3.7
Average benefit (dollars) .....	842.50	811.50	808.60	845.30	844.70	839.70	869.50	855.60	801.00

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana Nichelle Mercer (410) 966-6377.

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

**Table 5.F12—Number of widowed mothers and fathers and total monthly benefit, by type of benefit, December 1950–2001, selected years**

Year	Total		Widowed						Surviving divorced mothers and fathers	
			Total		With at least 1 child under age 16 <sup>a</sup>		Entitled solely because of at least 1 disabled child <sup>b</sup>			
	Number	Benefit (thousands of dollars)	Number	Benefit (thousands of dollars)	Number	Benefit (thousands of dollars)	Number	Benefit (thousands of dollars)	Number	Benefit (thousands of dollars)
1950	169,438	5,801	169,426	5,800	169,426	5,800	...	...	12	c
1955	291,916	13,403	291,656	13,389	291,656	13,389	...	...	260	14
1960	401,358	23,795	400,976	23,768	394,560	23,383	6,416	385	382	27
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	568,933	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

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.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana Nichelle Mercer (410) 966-6377.



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 reduction status and limitation of benefit, December 2001

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 .....	4,151,560	846.00	1,929,730	943.00	975,630	1,048.00	954,100	835.70	<sup>a</sup> 2,221,830	761.70
65-69 .....	672,810	845.30	117,370	983.40	82,310	1,024.60	35,060	886.60	555,440	816.20
65 .....	130,030	840.70	11,110	1,015.00	9,370	1,034.30	1,740	910.90	118,920	824.40
66 .....	133,030	845.20	18,730	995.10	14,420	1,021.20	4,310	907.60	114,300	820.70
67 .....	135,480	852.60	25,200	1,002.20	18,450	1,039.30	6,750	900.80	110,280	818.40
68 .....	132,720	844.40	27,790	969.70	18,560	1,022.40	9,230	863.80	104,930	811.20
69 .....	141,550	843.60	34,540	964.10	21,510	1,011.80	13,030	885.20	107,010	804.80
70-74 .....	770,290	844.70	256,370	952.40	137,230	1,022.70	119,140	871.40	513,920	791.00
70 .....	137,520	847.10	37,770	964.80	22,120	1,025.90	15,650	878.60	99,750	802.50
71 .....	148,950	846.00	45,240	953.80	24,500	1,028.20	20,740	866.00	103,710	798.90
72 .....	151,720	848.00	50,120	960.60	27,320	1,023.90	22,800	884.70	101,600	792.50
73 .....	160,480	843.70	57,420	949.30	29,890	1,020.70	27,530	871.80	103,060	784.80
74 .....	171,620	839.80	65,820	940.80	33,400	1,017.50	32,420	861.80	105,800	777.00
75-79 .....	912,010	839.70	416,060	943.90	200,870	1,044.70	215,190	849.80	495,950	752.40
75 .....	176,490	839.30	71,750	947.00	36,070	1,035.30	35,680	857.70	104,740	765.50
76 .....	177,210	838.20	76,480	940.50	36,640	1,037.40	39,840	851.40	100,730	760.50
77 .....	187,180	834.40	86,060	934.50	41,170	1,033.00	44,890	844.10	101,120	749.20
78 .....	183,440	840.30	87,430	944.50	41,910	1,050.20	45,520	847.30	96,010	745.30
79 .....	187,690	846.40	94,340	952.30	45,080	1,063.60	49,260	850.40	93,350	739.40
80-84 .....	826,950	869.50	471,830	975.70	220,110	1,109.00	251,720	859.20	355,120	728.40
80 .....	192,360	854.60	100,780	959.00	47,200	1,079.60	53,580	852.70	91,580	739.80
81 .....	182,940	865.50	100,410	971.20	47,310	1,097.90	53,100	858.40	82,530	736.90
82 .....	161,070	868.50	92,440	977.00	43,070	1,110.00	49,370	860.90	68,630	722.30
83 .....	152,690	882.20	92,560	986.30	42,260	1,135.10	50,300	861.20	60,130	722.10
84 .....	137,890	882.70	85,640	988.10	40,270	1,128.00	45,370	863.90	52,250	709.90
85-89 .....	573,660	855.60	382,640	949.00	177,940	1,093.10	204,700	823.80	191,020	668.40
85 .....	133,180	868.80	85,720	972.70	38,970	1,112.30	46,750	856.40	47,460	681.10
86 .....	125,480	864.20	83,260	961.50	38,520	1,110.30	44,740	833.40	42,220	672.30
87 .....	115,660	856.90	77,130	952.80	36,340	1,103.70	40,790	818.30	38,530	664.90
88 .....	105,200	846.90	71,560	933.40	33,650	1,078.80	37,910	804.30	33,640	662.90
89 .....	94,140	833.50	64,970	914.60	30,460	1,049.80	34,510	795.20	29,170	653.00
90 or older .....	395,840	801.00	285,460	854.70	157,170	950.00	128,290	737.90	110,380	662.10

a. Includes 153,040 widows with benefits also limited due to early retirement of spouse.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G1—Number and percentage distribution of persons receiving both a retired-worker and a secondary benefit without and with reduction for early retirement, by primary insurance amount and sex, December 2001

Primary insurance amount (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
<b>All dually entitled retired workers</b>						
Total .....	6,076,350	100.0	1,087,650	100.0	4,988,700	100.0
Less than 250.00 .....	697,270	11.5	104,330	9.6	592,940	11.9
250.00–299.90 .....	403,570	6.6	59,180	5.4	344,390	6.9
300.00–349.90 .....	581,020	9.6	96,030	8.8	484,990	9.7
350.00–399.90 .....	383,540	6.3	63,830	5.9	319,710	6.4
400.00–449.90 .....	435,860	7.2	73,150	6.7	362,710	7.3
450.00–499.90 .....	690,090	11.4	123,080	11.3	567,010	11.4
500.00–549.90 .....	629,600	10.4	112,860	10.4	516,740	10.4
550.00–599.90 .....	514,270	8.5	97,480	9.0	416,790	8.4
600.00–649.90 .....	415,530	6.8	80,210	7.4	335,320	6.7
650.00–699.90 .....	286,460	4.7	57,070	5.2	229,390	4.6
700.00–749.90 .....	220,900	3.6	45,660	4.2	175,240	3.5
750.00–799.90 .....	178,650	2.9	38,020	3.5	140,630	2.8
800.00–849.90 .....	146,240	2.4	30,910	2.8	115,330	2.3
850.00–899.90 .....	124,090	2.0	26,680	2.5	97,410	2.0
900.00–949.90 .....	101,350	1.7	20,890	1.9	80,460	1.6
950.00–999.90 .....	75,380	1.2	15,210	1.4	60,170	1.2
1,000.00–1,049.90 .....	61,130	1.0	11,930	1.1	49,200	1.0
1,050.00–1,099.90 .....	41,540	0.7	7,840	0.7	33,700	0.7
1,100.00 or more .....	89,860	1.5	23,290	2.1	66,570	1.3
<b>Men</b>						
Subtotal .....	114,770	100.0	29,930	100.0	84,840	100.0
Less than 250.00 .....	8,310	7.2	3,850	12.9	4,460	5.3
250.00–299.90 .....	3,940	3.4	1,570	5.2	2,370	2.8
300.00–349.90 .....	6,950	6.1	2,670	8.9	4,280	5.0
350.00–399.90 .....	3,870	3.4	1,370	4.6	2,500	2.9
400.00–449.90 .....	4,920	4.3	1,890	6.3	3,030	3.6
450.00–499.90 .....	7,350	6.4	2,350	7.9	5,000	5.9
500.00–549.90 .....	7,400	6.4	2,230	7.5	5,170	6.1
550.00–599.90 .....	6,530	5.7	2,060	6.9	4,470	5.3
600.00–649.90 .....	6,400	5.6	1,720	5.7	4,680	5.5
650.00–699.90 .....	4,900	4.3	970	3.2	3,930	4.6
700.00–749.90 .....	5,290	4.6	1,050	3.5	4,240	5.0
750.00–799.90 .....	4,970	4.3	910	3.0	4,060	4.8
800.00–849.90 .....	4,780	4.2	820	2.7	3,960	4.7
850.00–899.90 .....	4,410	3.8	860	2.9	3,550	4.2
900.00–949.90 .....	5,040	4.4	850	2.8	4,190	4.9
950.00–999.90 .....	4,880	4.3	680	2.3	4,200	5.0
1,000.00–1,049.90 .....	5,300	4.6	860	2.9	4,440	5.2
1,050.00–1,099.90 .....	4,340	3.8	650	2.2	3,690	4.3
1,100.00 or more .....	15,190	13.2	2,570	8.6	12,620	14.9
<b>Women</b>						
Subtotal .....	5,961,580	100.0	1,057,720	100.0	4,903,860	100.0
Less than 250.00 .....	688,960	11.6	100,480	9.5	588,480	12.0
250.00–299.90 .....	399,630	6.7	57,610	5.4	342,020	7.0
300.00–349.90 .....	574,070	9.6	93,360	8.8	480,710	9.8
350.00–399.90 .....	379,670	6.4	62,460	5.9	317,210	6.5
400.00–449.90 .....	430,940	7.2	71,260	6.7	359,680	7.3
450.00–499.90 .....	682,740	11.5	120,730	11.4	562,010	11.5
500.00–549.90 .....	622,200	10.4	110,630	10.5	511,570	10.4
550.00–599.90 .....	507,740	8.5	95,420	9.0	412,320	8.4
600.00–649.90 .....	409,130	6.9	78,490	7.4	330,640	6.7
650.00–699.90 .....	281,560	4.7	56,100	5.3	225,460	4.6
700.00–749.90 .....	215,610	3.6	44,610	4.2	171,000	3.5
750.00–799.90 .....	173,680	2.9	37,110	3.5	136,570	2.8
800.00–849.90 .....	141,460	2.4	30,090	2.8	111,370	2.3
850.00–899.90 .....	119,680	2.0	25,820	2.4	93,860	1.9
900.00–949.90 .....	96,310	1.6	20,040	1.9	76,270	1.6
950.00–999.90 .....	70,500	1.2	14,530	1.4	55,970	1.1
1,000.00–1,049.90 .....	55,830	0.9	11,070	1.0	44,760	0.9
1,050.00–1,099.90 .....	37,200	0.6	7,190	0.7	30,010	0.6
1,100.00 or more .....	74,670	1.3	20,720	2.0	53,950	1.1

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G2—Number receiving both a retired-worker and a secondary benefit, by sex and type of secondary benefit, December 1952–2001

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	17,837	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		<sup>b</sup>	<sup>b</sup>	<sup>b</sup>	<sup>b</sup>	<sup>b</sup>	<sup>b</sup>	<sup>b</sup>	<sup>b</sup>	<sup>b</sup>	<sup>b</sup>	<sup>b</sup>
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
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

a. Distributions by type of secondary benefit are estimated.  
b. Data not available.

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1993–2001 are based on a 10 percent sample. All other years are 100 percent data.

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## 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 2001**

Type of secondary benefit	Number	Average monthly benefit (dollars)		
		Combined benefit	Retired worker benefit	Reduced secondary benefit
All dually entitled retired workers.....	6,076,350	787.70	436.00	351.70
Wives and husbands.....	2,609,300	525.20	347.40	177.80
Wives.....	2,583,730	525.90	347.50	178.40
Of retired workers.....	2,551,960	526.20	347.60	178.60
Of disabled workers.....	31,770	497.20	338.10	159.10
Husbands.....	25,570	455.40	336.00	119.40
Of retired workers.....	24,700	456.80	337.10	119.70
Of disabled workers.....	870	415.60	304.10	111.50
Widow(er)s.....	3,466,500	985.20	502.70	482.50
Widows.....	3,377,330	987.10	497.80	489.30
Widowers.....	89,170	912.40	686.00	226.40
Parents.....	550	858.40	429.50	428.90

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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**Table 5.G4—Number receiving both a retired-worker and a secondary benefit, average monthly benefit, and the retired-worker benefit as a percentage of both benefits, December 2001**

Retired-worker and secondary benefits combined (dollars)	Number		Average combined monthly benefit (dollars)		Retired-worker benefit as a percentage of the retired-worker and secondary benefits combined	
	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> 2,609,300	<sup>b</sup> 3,466,500	522.60	991.40	66	51
Less than 200.00.....	20,290	2,510	156.90	153.10	81	77
200.00–249.90.....	27,560	3,460	226.30	227.70	76	75
250.00–299.90.....	43,830	8,130	276.20	278.30	72	76
300.00–349.90.....	70,450	16,250	326.80	325.00	69	76
350.00–399.90.....	125,530	19,560	377.20	376.20	68	71
400.00–449.90.....	257,340	30,130	427.70	426.30	67	69
450.00–499.90.....	479,780	46,180	476.40	475.90	67	69
500.00–549.90.....	631,900	58,380	523.60	525.30	69	68
550.00–599.90.....	407,320	70,210	572.20	575.40	68	66
600.00–649.90.....	252,170	88,670	623.10	625.10	66	65
650.00–699.90.....	149,660	106,660	671.90	675.30	63	63
700.00–749.90.....	77,440	134,240	721.90	725.80	60	62
750.00–799.90.....	38,900	175,170	768.70	775.60	58	61
800.00–849.90.....	10,340	218,810	820.60	825.30	52	59
850.00–899.90.....	4,340	270,420	873.60	874.40	48	58
900.00–949.90.....	3,130	303,120	923.50	925.20	47	55
950.00–999.90.....	1,850	303,910	974.00	974.40	48	52
1,000.00–1,049.90.....	<sup>c</sup> 7,470	292,330	<sup>c</sup> 1,172.00	1,024.20	<sup>c</sup> 41	51
1,050.00–1,099.90.....	...	260,530	...	1,073.40	...	49
1,100.00–1,149.90.....	...	206,610	...	1,123.20	...	48
1,150.00–1,199.90.....	...	177,260	...	1,173.70	...	47
1,200.00–1,249.90.....	...	150,700	...	1,223.60	...	45
1,250.00–1,299.90.....	...	130,890	...	1,273.60	...	44
1,300.00–1,349.90.....	...	104,240	...	1,321.70	...	42
1,350.00–1,399.90.....	...	70,410	...	1,373.20	...	42
1,400.00 or more.....	...	217,720	...	1,633.50	...	37

a. Includes 25,570 husbands.

b. Includes 89,170 widowers.

c. \$1,000 or more.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

NOTE: ... = not applicable.

CONTACT: Barbara Lingg (410) 965-0156 or Robert L. Hackendorf (410) 965-5536.

**5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement**

**Table 5.G5—Number and percentage distribution, by total combined monthly benefit and retired-worker benefit, December 2001**

Total combined monthly benefit (dollars)	Number	Total	Percentage distribution by dollar amount of retired-worker benefit											
			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
<i>Dually entitled wives and husbands</i>														
Total .....	<sup>a</sup> 2,609,300	100.0	16.3	11.1	11.0	9.8	13.9	14.6	11.1	6.6	3.1	1.6	0.6	0.3
Less than 200.00 .....	20,290	100.0	100.0	...	...	...	...	...	...	...	...	...	...	...
200.00-249.90 .....	27,560	100.0	66.1	33.7	...	...	...	...	...	...	...	...	...	...
250.00-299.90 .....	43,830	100.0	46.9	29.0	24.1	...	...	...	...	...	...	...	...	...
300.00-349.90 .....	70,450	100.0	35.1	23.9	24.0	17.0	...	...	...	...	...	...	...	...
350.00-399.90 .....	125,530	100.0	27.3	19.4	19.9	17.7	15.7	...	...	...	...	...	...	...
400.00-449.90 .....	257,340	100.0	22.4	14.8	14.1	13.2	21.3	14.1	...	...	...	...	...	...
450.00-499.90 .....	479,780	100.0	17.9	12.2	11.9	11.1	18.3	19.2	9.4	...	...	...	...	...
500.00-549.90 .....	631,900	100.0	11.4	9.0	9.9	9.6	16.2	19.5	17.0	7.5	...	...	...	...
550.00-599.90 .....	407,320	100.0	9.1	7.7	8.6	8.3	12.4	17.0	16.6	14.6	5.7	...	...	...
600.00-649.90 .....	252,170	100.0	9.7	7.4	7.7	7.5	9.6	13.3	14.3	13.6	11.8	5.0	...	...
650.00-699.90 .....	149,660	100.0	9.8	7.7	7.6	7.1	8.5	10.2	12.4	11.6	10.7	10.6	3.8	...
700.00 or more .....	143,470	100.0	10.2	7.9	8.5	7.8	6.9	7.6	11.0	10.2	8.9	8.3	7.0	5.8
<i>Dually entitled widow(er)s</i>														
Total .....	<sup>b</sup> 3,466,500	100.0	6.3	5.3	9.0	7.4	8.8	8.9	8.7	7.8	6.9	6.3	5.4	19.2
Less than 200.00 .....	2,510	100.0	100.0	...	...	...	...	...	...	...	...	...	...	...
200.00-249.90 .....	3,460	100.0	65.6	34.4	...	...	...	...	...	...	...	...	...	...
250.00-299.90 .....	8,130	100.0	35.7	28.4	35.9	...	...	...	...	...	...	...	...	...
300.00-349.90 .....	16,250	100.0	20.9	15.4	43.6	20.1	...	...	...	...	...	...	...	...
350.00-399.90 .....	19,560	100.0	19.6	15.3	27.9	23.5	...	...	...	...	...	...	...	...
400.00-449.90 .....	30,130	100.0	15.9	10.7	22.8	19.3	19.3	12.0	...	...	...	...	...	...
450.00-499.90 .....	46,180	100.0	12.0	8.6	18.1	15.8	17.6	17.5	10.2	...	...	...	...	...
500.00-549.90 .....	58,380	100.0	9.7	7.0	15.1	14.2	15.7	15.0	14.8	8.5	...	...	...	...
550.00-599.90 .....	70,210	100.0	7.8	7.1	12.7	11.3	12.9	14.4	14.7	12.6	6.5	...	...	...
600.00-649.90 .....	88,670	100.0	7.7	6.2	11.2	9.9	11.2	12.5	13.7	12.1	10.4	5.1	...	...
650.00-699.90 .....	106,660	100.0	6.2	5.7	10.0	8.9	10.7	11.4	12.3	11.7	10.4	8.5	4.2	...
700.00-749.90 .....	134,240	100.0	5.7	5.0	9.5	8.1	9.5	10.6	11.5	10.5	10.0	9.1	6.9	3.5
750.00-799.90 .....	175,170	100.0	4.8	4.4	9.4	7.9	8.8	9.8	10.1	10.4	8.8	9.0	7.8	8.8
800.00-849.90 .....	218,810	100.0	4.5	4.6	9.2	7.2	8.7	8.9	9.3	9.1	8.9	8.5	7.1	14.0
850.00-899.90 .....	270,420	100.0	4.4	4.2	8.5	6.9	8.3	8.8	8.6	8.6	8.3	7.7	7.2	18.6
900.00-949.90 .....	303,120	100.0	5.6	4.8	8.0	6.9	8.7	8.2	8.5	8.0	7.5	7.0	6.5	20.1
950.00-999.90 .....	303,910	100.0	6.1	5.0	8.2	6.4	8.4	8.4	8.2	7.5	7.0	6.8	6.0	21.9
1,000.00-1,049.90 .....	292,330	100.0	6.2	4.9	7.7	6.2	8.5	8.5	8.0	7.5	6.7	6.2	5.6	23.8
1,050.00-1,099.90 .....	260,530	100.0	6.1	5.1	7.7	5.9	8.3	8.5	8.2	7.3	6.9	6.1	5.6	24.4
1,100.00-1,149.90 .....	206,610	100.0	5.6	4.9	7.4	6.2	8.0	8.6	7.8	7.2	6.2	6.2	5.6	26.3
1,150.00-1,199.90 .....	177,260	100.0	5.9	4.9	7.1	6.2	7.9	8.0	8.0	6.9	6.0	6.1	5.3	27.7
1,200.00-1,249.90 .....	150,700	100.0	6.3	5.5	6.8	5.6	7.7	8.1	7.9	7.0	6.4	5.5	5.4	27.7
1,250.00-1,299.90 .....	130,890	100.0	6.1	5.1	6.9	6.0	7.5	7.7	8.0	7.0	5.8	5.8	5.3	28.8
1,300.00-1,349.90 .....	104,240	100.0	5.4	5.5	8.1	6.7	7.4	8.0	7.7	6.3	5.8	5.3	4.7	29.2
1,350.00-1,399.90 .....	70,410	100.0	5.3	5.2	7.7	6.6	7.5	7.0	7.7	7.0	5.6	5.2	5.3	30.0
1,400.00 or more .....	217,720	100.0	5.0	5.3	8.4	7.0	7.4	7.4	7.0	5.9	5.3	5.3	4.6	31.4

a. Includes 25,570 husbands.  
 b. Includes 89,170 widowers.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

NOTE: ... = not applicable.

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5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H1—Number and average monthly family benefit for selected family groups, December 1945–2001, 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	
<i>Number (thousands)</i>														
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	49
<i>Average monthly family benefit (dollars)</i>														
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
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	1,422.70

a. Wife's entitlement based on age.  
b. Wife's entitlement based on care of children.

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1985–2001 are based on a 10 percent sample. Data for prior years based on different sampling rates.

NOTE: ... = not applicable.

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**Table 5.H2—Number, average primary insurance amount, and average monthly family benefit for selected family groups, December 2001**

Family classification	Number of families <sup>a</sup> (thousands)	Number of beneficiaries <sup>a</sup> (thousands)	Average primary insurance amount (dollars)	Average monthly family benefit (dollars)
<b>Retired-worker families</b>				
Worker only .....	25,838	25,838	859.30	860.20
Men.....	11,990	11,990	1,077.40	979.90
Full benefit.....	3,727	3,727	1,117.00	1,157.40
Reduced benefit.....	8,264	8,264	1,060.00	899.90
Women.....	13,848	13,848	670.50	756.60
Full benefit.....	3,527	3,527	759.00	870.10
Reduced benefit.....	10,321	10,321	640.20	717.80
Worker and wife .....	2,581	5,161	1,102.20	1,465.50
Full worker benefit.....	888	1,776	1,161.70	1,707.00
Reduced worker benefit.....	1,692	3,385	1,071.00	1,338.70
Worker and husband.....	33	65	545.60	761.20
Worker and children .....	279	611	994.30	1,426.20
Male worker <sup>b</sup> .....	248	546	1,027.60	1,471.80
Female worker <sup>c</sup> .....	31	66	726.40	1,059.90
Worker, wife, and children.....	103	335	1,039.60	1,711.70
Worker, wife, and 1 child.....	84	253	1,051.20	1,726.50
Full worker benefit.....	26	79	1,080.30	1,914.10
Reduced worker benefit.....	58	174	1,038.00	1,641.70
Worker, wife, and 2 or more children.....	19	82	987.30	1,644.30
Full worker benefit.....	5	24	989.90	1,778.80
Reduced worker benefit.....	13	59	986.20	1,590.30
<b>Survivor families</b>				
Nondisabled widow or widower only.....	4,454	4,454	989.90	841.20
Full benefit.....	1,872	1,872	995.40	943.00
Reduced benefit.....	2,582	2,582	985.90	767.30
Nondisabled widow or widower and children ..	95	197	907.40	1,457.70
Full benefit.....	58	120	892.60	1,489.30
Reduced benefit.....	37	77	930.30	1,408.20
Disabled widow or widower only.....	184	184	986.50	534.50
Widowed mother or father and children.....	190	513	975.60	1,568.90
1 child.....	98	196	968.00	1,439.70
2 children.....	63	190	1,009.90	1,755.10
3 or more children.....	29	127	925.60	1,600.60
Children only.....	1,074	1,466	807.00	766.60
1 child.....	793	793	809.30	605.70
2 children.....	201	403	815.20	1,200.20
3 or more children.....	80	270	763.40	1,270.20
Parents.....	2	2	926.60	752.40
<b>Disabled-worker families</b>				
Worker only.....	4,292	4,292	804.70	801.20
Men.....	2,282	2,282	916.70	911.00
Women.....	2,010	2,010	677.50	676.60
Worker and spouse <sup>d</sup> .....	51	101	1,130.90	1,405.70
Worker and children.....	817	2,083	868.90	1,249.60
Male worker.....	518	1,332	924.00	1,335.60
Female worker.....	300	751	773.50	1,100.90
Worker, wife, and children.....	103	407	933.50	1,369.30
1 child.....	43	129	971.70	1,440.70
2 or more children.....	60	277	905.90	1,317.90
Worker, husband, and children.....	2	8	742.80	1,063.50

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

b. Includes 172,900 families with reduced retired-worker benefits.

c. Includes 30,900 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.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

NOTE: The term "full benefit" applies to benefits not subject to actuarial reduction, and the term "reduced benefit" applies to benefits subject to actuarial reduction.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

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

**Table 5.H3—Number and percentage distribution of retired-worker and disabled-worker families, by monthly benefit for selected family groups, December 2001**

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 .....	11,990,100	13,847,970	2,580,620	84,250	18,620	2,282,260	2,009,540	43,140	59,770
Total percent .....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 100.00 .....	0.2	0.2	0.1	0.0	0.1	0.2	0.2	0.1	0.1
100.00–149.90 .....	0.5	0.5	0.2	0.1	0.2	0.2	0.6	0.1	0.2
150.00–199.90 .....	0.8	0.8	0.3	0.2	0.2	0.5	1.4	0.0	0.1
200.00–249.90 .....	0.9	1.1	0.3	0.3	0.2	0.8	2.2	0.1	0.2
250.00–299.90 .....	1.1	1.6	0.5	0.3	0.6	1.1	2.8	0.2	0.1
300.00–349.90 .....	1.1	2.0	0.5	0.5	0.5	1.5	3.4	0.2	0.3
350.00–399.90 .....	1.4	2.9	0.7	0.6	0.5	1.6	3.6	0.2	0.3
400.00–449.90 .....	1.8	4.7	0.7	0.6	0.9	2.0	4.3	0.4	0.3
450.00–499.90 .....	2.1	7.2	0.7	0.8	1.0	3.9	8.5	0.6	1.0
500.00–549.90 .....	2.3	8.8	0.8	0.7	0.9	4.7	9.2	1.2	1.8
550.00–599.90 .....	2.4	7.5	1.0	0.9	1.3	4.8	8.7	1.7	1.9
600.00–649.90 .....	2.6	6.4	1.2	1.3	1.7	5.1	8.0	1.6	2.3
650.00–699.90 .....	2.9	5.6	1.3	1.4	1.7	5.0	7.1	1.4	2.3
700.00–749.90 .....	3.2	5.1	1.4	1.4	3.2	5.1	6.3	1.9	2.7
750.00–799.90 .....	3.7	4.9	1.4	1.9	2.5	4.9	5.5	1.7	2.8
800.00–849.90 .....	4.3	4.8	1.5	1.7	2.3	4.8	4.7	2.4	2.7
850.00–899.90 .....	5.0	4.8	1.6	1.3	2.4	4.7	4.0	2.4	2.9
900.00–949.90 .....	6.0	4.8	1.6	1.4	1.5	4.5	3.4	2.5	3.0
950.00–999.90 .....	6.3	4.4	1.7	1.2	1.5	4.3	2.9	2.5	3.7
1,000.00–1,049.90 .....	7.6	4.1	1.9	1.2	2.0	4.2	2.5	3.8	4.3
1,050.00–1,099.90 .....	7.5	3.5	2.0	1.2	1.8	3.9	2.0	3.8	4.8
1,100.00–1,149.90 .....	6.3	2.8	2.3	1.3	1.2	3.7	1.6	3.8	4.5
1,150.00–1,199.90 .....	5.6	2.4	2.5	1.5	1.7	3.6	1.3	3.6	4.6
1,200.00–1,249.90 .....	4.8	2.0	2.7	1.5	1.6	3.5	1.2	3.4	4.1
1,250.00–1,299.90 .....	4.5	1.7	3.1	1.2	1.3	4.2	1.2	3.6	3.9
1,300.00–1,349.90 .....	3.7	1.4	3.6	1.7	1.8	4.2	1.1	3.3	3.4
1,350.00–1,399.90 .....	2.7	1.0	4.4	1.6	1.6	3.6	0.8	3.6	3.4
1,400.00–1,449.90 .....	2.0	0.7	4.5	1.6	1.4	3.1	0.6	3.3	3.1
1,450.00–1,499.90 .....	1.6	0.5	4.9	1.4	1.8	2.3	0.4	3.3	2.8
1,500.00–1,549.90 .....	<sup>b</sup> 5.1	<sup>b</sup> 1.5	5.8	2.0	1.8	<sup>b</sup> 3.9	<sup>b</sup> 0.7	2.8	2.6
1,550.00–1,599.90 .....	...	...	5.8	2.1	2.4	...	...	2.6	2.6
1,600.00–1,649.90 .....	...	...	5.1	2.8	2.1	...	...	2.5	2.1
1,650.00–1,699.90 .....	...	...	4.5	2.9	2.1	...	...	2.2	1.8
1,700.00–1,749.90 .....	...	...	3.9	3.5	3.0	...	...	2.8	1.9
1,750.00–1,799.90 .....	...	...	3.5	3.4	3.1	...	...	2.5	1.7
1,800.00–1,849.90 .....	...	...	3.1	3.6	3.1	...	...	3.0	1.8
1,850.00–1,899.90 .....	...	...	2.7	4.0	2.7	...	...	3.1	2.0
1,900.00–1,949.90 .....	...	...	2.4	4.4	3.1	...	...	2.4	2.1
1,950.00–1,999.90 .....	...	...	2.0	4.5	2.7	...	...	2.7	1.7
2,000.00–1,049.90 .....	...	...	1.7	4.2	3.8	...	...	2.4	1.6
2,050.00–2,099.90 .....	...	...	1.5	3.9	2.5	...	...	2.1	1.4
2,100.00–2,149.90 .....	...	...	1.3	3.4	3.1	...	...	1.8	1.5
2,150.00–2,199.90 .....	...	...	1.1	3.2	3.1	...	...	1.9	1.3
2,200.00–2,249.90 .....	...	...	0.9	2.9	2.6	...	...	1.6	1.0
2,250.00–2,299.90 .....	...	...	0.8	2.9	2.1	...	...	1.3	1.1
2,300.00–2,349.90 .....	...	...	0.7	2.6	1.9	...	...	<sup>c</sup> 5.5	<sup>c</sup> 4.5
2,350.00–2,399.90 .....	...	...	0.6	2.1	1.7	...	...	...	...
2,400.00–2,449.90 .....	...	...	0.5	1.7	1.8	...	...	...	...
2,450.00–2,499.90 .....	...	...	0.4	1.4	1.8	...	...	...	...
2,500.00 or more .....	...	...	2.5	7.9	9.8	...	...	...	...
Average monthly family benefit (dollars) .....	979.90	756.60	1,465.50	1,726.50	1,644.30	911.00	676.60	1,440.70	1,317.90

a. Cases involving actuarial reduction may be represented in all benefit intervals for which values are shown.

b. \$1,500 or more.

c. \$2,300 or more.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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

... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.



**Table 5.H4—Number and percentage distribution of survivor families, by monthly benefit for selected family groups, December 2001**

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 widow	Disabled widow
Total number .....	98,170	63,270	28,680	792,580	201,280	79,980	4,416,090	178,790
Total percent .....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 100.00 .....	0	0.1	0.1	0.6	0.3	0.5	0.2	3.5
100.00–149.90 .....	0	0	0	1.2	0.2	0.3	0.2	2.8
150.00–199.90 .....	0.2	0.2	0.2	1.7	0.7	0.6	0.3	3.7
200.00–249.90 .....	0.2	0.3	0.5	2.1	0.9	1.6	0.8	4.9
250.00–299.90 .....	0.3	0.4	0.5	2.1	1.2	1.6	1.4	5.1
300.00–349.90 .....	0.4	0.4	0.8	7.6	1.5	2.0	2.1	5.9
350.00–399.90 .....	0.5	0.6	1.0	7.6	1.5	2.1	2.1	7.1
400.00–449.90 .....	0.7	0.6	0.8	7.6	1.5	2.1	2.6	7.5
450.00–499.90 .....	0.9	0.6	0.7	7.3	2.0	2.2	3.0	7.0
500.00–549.90 .....	0.7	0.7	1.1	7.5	1.7	2.1	3.4	6.8
550.00–599.90 .....	0.8	0.6	1.3	7.3	1.5	2.0	4.0	6.2
600.00–649.90 .....	1.0	0.7	1.2	7.8	1.8	2.0	5.0	5.8
650.00–699.90 .....	1.3	1.2	1.8	6.7	2.5	2.8	5.6	5.2
700.00–749.90 .....	2.1	1.6	2.4	5.7	3.4	3.8	6.4	5.1
750.00–799.90 .....	2.3	2.2	3.1	5.0	3.9	4.3	6.6	4.2
800.00–849.90 .....	2.8	2.5	3.3	4.2	4.1	4.4	7.1	4.0
850.00–899.90 .....	2.8	2.2	3.1	3.7	4.0	3.8	7.6	3.5
900.00–949.90 .....	3.0	2.7	3.5	3.3	4.0	4.2	8.0	4.5
950.00–999.90 .....	2.8	2.0	3.0	3.4	3.8	3.4	6.8	3.2
1,000.00–1,049.90 .....	2.9	1.6	2.2	2.5	3.7	2.9	5.7	a 4.0
1,050.00–1,099.90 .....	3.2	2.0	1.3	1.8	3.8	2.2	4.7	...
1,100.00–1,149.90 .....	3.2	1.5	1.8	b 3.3	3.5	2.0	3.5	...
1,150.00–1,199.90 .....	3.2	1.6	1.7	...	3.3	1.7	2.8	...
1,200.00–1,249.90 .....	3.4	1.5	2.2	...	3.6	1.8	2.2	...
1,250.00–1,299.90 .....	3.3	1.5	1.6	...	3.1	1.9	1.9	...
1,300.00–1,349.90 .....	3.3	1.6	1.7	...	3.1	1.6	1.5	...
1,350.00–1,399.90 .....	3.2	2.3	1.6	...	2.8	1.8	1.0	...
1,400.00–1,449.90 .....	3.2	1.8	1.7	...	2.5	2.0	c 3.3	...
1,450.00–1,499.90 .....	3.2	1.9	2.1	...	2.4	1.5	...	...
1,500.00–1,549.90 .....	2.9	1.9	2.4	...	2.2	1.9	...	...
1,550.00–1,599.90 .....	2.9	2.1	2.0	...	1.9	1.5	...	...
1,600.00–1,649.90 .....	2.7	1.6	1.8	...	2.0	1.6	...	...
1,650.00–1,699.90 .....	2.9	2.1	1.8	...	1.8	1.5	...	...
1,700.00–1,749.90 .....	2.3	2.2	2.2	...	1.6	1.6	...	...
1,750.00–1,799.90 .....	2.8	2.5	2.1	...	1.4	1.7	...	...
1,800.00–1,849.90 .....	2.6	2.7	2.2	...	1.5	1.8	...	...
1,850.00–1,899.90 .....	2.7	3.0	2.4	...	1.6	1.8	...	...
1,900.00–1,949.90 .....	3.0	2.6	2.4	...	1.8	1.7	...	...
1,950.00–1,999.90 .....	2.9	3.0	2.8	...	1.6	1.7	...	...
2,000.00–2,049.90 .....	2.3	2.6	2.4	...	1.4	1.7	...	...
2,050.00–2,099.90 .....	2.4	2.4	2.0	...	1.5	1.4	...	...
2,100.00–2,149.90 .....	2.0	2.4	2.2	...	1.3	1.3	...	...
2,150.00–2,199.90 .....	2.0	2.4	1.8	...	1.2	1.2	...	...
2,200.00–2,249.90 .....	1.7	2.5	1.8	...	0.9	1.3	...	...
2,250.00–2,299.90 .....	1.3	2.7	2.0	...	0.9	1.4	...	...
2,300.00–2,349.90 .....	d 5.0	2.6	1.3	...	d 3.1	1.1	...	...
2,350.00–2,399.90 .....	...	2.0	1.5	...	...	0.9	...	...
2,400.00–2,449.90 .....	...	2.1	1.9	...	...	0.9	...	...
2,450.00–2,499.90 .....	...	1.8	1.0	...	...	0.9	...	...
2,500.00 or more .....	...	16.0	13.5	...	...	6.5	...	...
Average monthly family benefit (dollars) .....	1,439.70	1,755.10	1,600.60	605.70	1,200.20	1,270.20	842.90	539.20

a. \$1,000 or more.

b. \$1,100 or more.

c. \$1,400 or more.

d. \$2,300 or more.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

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

**Table 5.J1—Estimated total benefits paid, by program and state or other area, 2001 (in millions of dollars)**

State or area	All Social Security programs	Retirement	Survivors	Disability
All areas.....	431,737	290,799	81,359	59,579
Alabama.....	7,428	4,467	1,550	1,411
Alaska.....	506	317	101	88
Arizona.....	7,713	5,401	1,260	1,052
Arkansas.....	4,495	2,775	878	843
California.....	40,358	28,010	7,179	5,169
Colorado.....	5,004	3,365	932	707
Connecticut.....	6,015	4,438	930	647
Delaware.....	1,357	933	239	185
District of Columbia.....	603	403	113	87
Florida.....	30,455	21,846	4,981	3,629
Georgia.....	10,172	6,381	1,967	1,824
Hawaii.....	1,752	1,319	261	171
Idaho.....	1,829	1,263	329	236
Illinois.....	18,397	12,668	3,614	2,115
Indiana.....	9,899	6,698	1,913	1,289
Iowa.....	5,149	3,585	1,012	552
Kansas.....	4,273	2,968	822	484
Kentucky.....	6,578	3,729	1,379	1,470
Louisiana.....	6,248	3,533	1,637	1,077
Maine.....	2,199	1,440	388	371
Maryland.....	7,057	4,835	1,356	867
Massachusetts.....	10,161	7,007	1,711	1,444
Michigan.....	16,827	11,187	3,289	2,351
Minnesota.....	7,048	4,963	1,309	776
Mississippi.....	4,374	2,514	896	964
Missouri.....	9,415	6,203	1,773	1,438
Montana.....	1,451	978	278	195
Nebraska.....	2,663	1,866	512	286
Nevada.....	2,869	2,032	435	401
New Hampshire.....	1,970	1,377	325	268
New Jersey.....	14,221	10,201	2,411	1,609
New Mexico.....	2,451	1,614	474	363
New York.....	30,142	20,893	5,093	4,156
North Carolina.....	12,458	8,193	2,076	2,189
North Dakota.....	1,020	680	239	102
Ohio.....	18,598	12,289	4,036	2,272
Oklahoma.....	5,429	3,545	1,123	761
Oregon.....	5,536	3,904	957	676
Pennsylvania.....	23,270	16,036	4,624	2,609
Rhode Island.....	1,821	1,283	274	264
South Carolina.....	6,355	4,041	1,122	1,192
South Dakota.....	1,186	808	251	127
Tennessee.....	9,109	5,707	1,787	1,616
Texas.....	24,367	15,948	5,397	3,021
Utah.....	2,300	1,632	410	257
Vermont.....	973	659	165	149
Virginia.....	9,707	6,365	1,831	1,511
Washington.....	8,427	5,918	1,437	1,072
West Virginia.....	3,690	2,054	868	768
Wisconsin.....	8,818	6,274	1,585	959
Wyoming.....	737	516	124	97
Outlying areas				
American Samoa.....	31	9	10	11
Guam.....	71	43	19	8
Northern Mariana Islands.....	9	5	3	1
Puerto Rico.....	4,231	2,103	869	1,259
Virgin Islands.....	108	76	18	14
Foreign countries.....	2,381	1,483	782	116

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Cherie N. Jefferies (410) 965-5520.

Table 5.J2—Number, by type of benefit and state or other area, December 2001

State or area	Total	Retirement			Survivors		Disability		
		Retired workers <sup>a</sup>	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
All areas <sup>b</sup> .....	45,874,040	28,841,850	2,737,720	466,630	5,024,520	1,890,280	5,265,190	157,430	1,490,420
Alabama.....	841,730	465,860	46,630	9,930	103,210	41,580	129,880	4,450	40,190
Alaska.....	56,940	32,750	2,660	890	4,970	4,880	7,860	160	2,770
Arizona.....	813,180	531,200	49,930	7,190	76,060	29,720	91,190	2,280	25,610
Arkansas.....	520,680	298,680	28,790	5,210	61,000	22,750	79,640	2,010	22,600
California.....	4,247,470	2,743,610	283,340	51,200	421,540	169,760	451,530	12,120	114,370
Colorado.....	542,210	341,280	36,830	4,120	57,070	21,130	62,540	1,550	17,690
Connecticut.....	580,180	405,620	26,540	5,380	51,300	19,490	55,180	1,160	15,510
Delaware.....	137,170	89,140	7,200	1,400	13,710	5,230	16,010	320	4,160
District of Columbia.....	73,390	48,090	2,790	820	7,440	4,550	8,560	30	1,110
Florida.....	3,235,390	2,193,890	182,620	30,310	306,820	105,800	321,540	8,090	86,320
Georgia.....	1,125,190	661,970	52,830	10,570	122,360	61,900	164,730	4,360	46,470
Hawaii.....	188,920	134,410	9,710	2,420	16,140	6,860	14,630	430	4,320
Idaho.....	199,640	128,350	13,670	1,660	19,890	8,030	21,490	600	5,950
Illinois.....	1,845,500	1,201,790	103,010	17,980	207,560	79,300	179,850	4,420	51,590
Indiana.....	1,000,050	635,280	55,370	8,670	111,110	40,760	112,660	2,790	33,410
Iowa.....	541,280	352,450	38,050	4,100	64,690	16,730	50,560	1,200	13,500
Kansas.....	440,620	286,590	27,570	3,420	49,220	16,480	43,730	800	12,810
Kentucky.....	746,330	389,330	46,930	7,340	96,520	31,080	130,230	6,450	38,450
Louisiana.....	716,220	365,420	56,130	9,670	108,590	44,780	92,530	5,280	33,820
Maine.....	253,810	154,910	13,920	2,350	25,860	8,040	36,200	990	11,540
Maryland.....	733,940	480,880	37,540	6,810	77,710	37,330	73,930	1,070	18,670
Massachusetts.....	1,061,920	696,240	50,730	9,660	102,450	35,070	128,510	2,450	36,810
Michigan.....	1,658,480	1,026,770	101,240	16,930	188,510	70,620	192,100	5,400	56,910
Minnesota.....	746,100	495,620	48,150	6,180	80,960	25,130	70,680	1,100	18,280
Mississippi.....	523,460	275,660	23,510	7,160	60,430	31,260	90,150	3,320	31,970
Missouri.....	1,012,790	624,910	55,760	8,890	109,710	42,040	130,300	3,580	37,600
Montana.....	159,180	100,010	10,790	1,520	17,690	5,950	17,490	670	5,060
Nebraska.....	285,900	187,360	19,900	2,220	31,850	9,700	26,730	550	7,590
Nevada.....	299,910	204,130	14,460	2,790	25,360	10,550	34,000	640	7,980
New Hampshire.....	204,140	135,720	9,300	1,580	18,520	7,380	23,600	450	7,590
New Jersey.....	1,355,570	930,570	57,580	12,470	133,720	50,840	131,350	3,190	35,850
New Mexico.....	285,250	169,460	21,280	3,620	30,240	15,540	33,290	1,470	10,350
New York.....	3,014,910	1,965,790	148,110	35,120	295,210	114,610	345,880	10,350	99,840
North Carolina.....	1,373,880	853,740	57,930	10,810	134,940	58,400	200,240	4,360	53,460
North Dakota.....	114,380	70,470	10,320	840	16,640	3,820	9,560	270	2,460
Ohio.....	1,921,920	1,178,840	140,470	17,930	250,020	72,740	201,160	5,330	55,430
Oklahoma.....	597,270	367,050	36,990	5,320	72,010	26,830	68,900	2,240	17,930
Oregon.....	577,570	383,590	35,370	5,120	57,860	19,050	61,470	1,490	13,620
Pennsylvania.....	2,365,850	1,545,510	139,200	19,070	283,180	81,700	229,190	7,020	60,980
Rhode Island.....	191,520	129,650	6,720	1,570	16,030	6,370	23,990	530	6,660
South Carolina.....	703,930	421,330	30,020	6,020	70,860	35,780	107,120	2,520	30,280
South Dakota.....	136,560	86,210	10,340	1,160	16,450	6,120	12,260	210	3,810
Tennessee.....	1,010,900	588,420	54,930	9,250	117,210	47,180	148,610	4,870	40,430
Texas.....	2,672,950	1,605,330	197,760	32,090	339,910	137,310	268,460	11,390	80,700
Utah.....	246,330	159,570	17,960	2,650	21,840	12,830	22,810	540	8,130
Vermont.....	105,330	66,570	5,670	990	10,200	3,590	13,400	410	4,500
Virginia.....	1,053,340	651,010	57,860	9,140	115,420	44,630	133,540	4,260	37,480
Washington.....	858,510	563,710	54,520	7,720	82,950	30,510	94,700	2,150	22,250
West Virginia.....	394,510	201,500	29,360	4,080	58,860	16,080	64,210	3,780	16,640
Wisconsin.....	905,450	608,890	52,280	7,680	94,480	31,330	85,830	1,400	23,560
Wyoming.....	78,420	51,440	4,860	530	7,200	3,070	8,520	290	2,510
Outlying areas									
American Samoa.....	5,320	1,370	160	310	560	910	1,240	70	700
Guam.....	11,370	5,760	1,060	620	1,150	1,380	820	110	470
Northern Mariana Islands.....	1,750	740	110	260	220	270	110	0	40
Puerto Rico.....	677,130	302,640	53,950	15,490	80,620	39,700	127,480	9,550	47,700
Virgin Islands.....	14,020	8,850	950	450	1,170	850	1,230	70	450
Foreign countries.....	404,640	234,030	55,600	7,780	77,040	14,500	11,540	820	3,330

a. Includes special age-72 beneficiaries.

b. Includes beneficiaries with unknown state code.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J3—Number and total monthly benefit for beneficiaries aged 65 or older, by sex and state or other area, December 2001

State or area	Number			Monthly benefit (thousands of dollars)		
	Total	Men	Women	Total	Men	Women
All areas <sup>a</sup> .....	32,932,110	13,684,220	19,247,890	27,791,409	13,461,512	14,329,897
Alabama.....	543,980	218,930	325,050	430,347	204,233	226,114
Alaska.....	34,690	16,540	18,150	28,584	15,625	12,959
Arizona.....	586,720	258,410	328,310	503,568	257,498	246,070
Arkansas.....	344,360	141,720	202,640	265,429	127,817	137,613
California.....	3,132,430	1,351,130	1,781,300	2,672,527	1,327,374	1,345,153
Colorado.....	392,210	167,580	224,630	322,176	161,696	160,480
Connecticut.....	447,380	181,940	265,440	419,869	200,277	219,592
Delaware.....	98,090	41,060	57,030	87,230	42,684	44,546
District of Columbia.....	53,990	20,880	33,110	39,167	17,248	21,919
Florida.....	2,429,150	1,051,270	1,377,880	2,060,258	1,033,247	1,027,011
Georgia.....	737,060	295,520	441,540	600,022	283,980	316,042
Hawaii.....	145,660	63,290	82,370	121,676	59,749	61,927
Idaho.....	144,050	62,950	81,100	118,850	60,962	57,888
Illinois.....	1,372,440	557,710	814,730	1,222,963	578,984	643,978
Indiana.....	715,710	288,760	426,950	635,045	300,043	335,002
Iowa.....	414,440	170,180	244,260	348,160	168,371	179,789
Kansas.....	331,570	135,090	196,480	288,106	138,038	150,069
Kentucky.....	470,580	191,370	279,210	366,337	175,192	191,144
Louisiana.....	467,890	191,500	276,390	359,743	175,373	184,370
Maine.....	176,640	74,640	102,000	138,140	68,044	70,096
Maryland.....	538,990	219,480	319,510	461,058	217,687	243,370
Massachusetts.....	789,350	316,030	473,320	678,101	317,203	360,898
Michigan.....	1,175,200	485,630	689,570	1,063,363	516,291	547,073
Minnesota.....	563,970	232,950	331,020	470,348	228,684	241,664
Mississippi.....	317,070	126,850	190,220	240,753	113,444	127,309
Missouri.....	706,640	289,550	417,090	589,993	282,801	307,193
Montana.....	114,030	49,770	64,260	93,163	47,143	46,020
Nebraska.....	218,850	89,740	129,110	181,396	87,464	93,932
Nevada.....	215,230	101,040	114,190	186,111	99,004	87,108
New Hampshire.....	147,120	62,630	84,490	128,324	63,820	64,504
New Jersey.....	1,031,430	415,840	615,590	974,622	457,423	517,199
New Mexico.....	195,110	86,880	108,230	151,875	78,883	72,992
New York.....	2,191,110	884,530	1,306,580	1,978,336	921,572	1,056,764
North Carolina.....	932,550	375,730	556,820	762,029	359,169	402,860
North Dakota.....	89,030	36,880	52,150	69,039	33,784	35,255
Ohio.....	1,413,600	577,510	836,090	1,208,524	584,157	624,366
Oklahoma.....	424,050	175,270	248,780	341,727	163,743	177,984
Oregon.....	425,450	182,690	242,760	365,190	181,808	183,382
Pennsylvania.....	1,786,650	713,530	1,073,120	1,557,206	732,124	825,082
Rhode Island.....	140,970	56,190	84,780	121,575	56,055	65,520
South Carolina.....	459,890	186,840	273,050	375,400	179,468	195,932
South Dakota.....	103,410	43,310	60,100	79,571	39,128	40,443
Tennessee.....	671,460	269,880	401,580	543,377	257,288	286,089
Texas.....	1,900,560	807,010	1,093,550	1,547,892	773,050	774,842
Utah.....	178,820	78,020	100,800	151,936	78,495	73,441
Vermont.....	74,480	31,310	43,170	62,238	30,568	31,670
Virginia.....	735,750	300,230	435,520	604,141	287,887	316,255
Washington.....	629,800	269,570	360,230	554,048	276,888	277,160
West Virginia.....	255,640	103,170	152,470	207,665	98,715	108,950
Wisconsin.....	679,370	283,660	395,710	589,082	288,410	300,672
Wyoming.....	56,350	25,500	30,850	47,647	25,317	22,330
Outlying areas						
American Samoa.....	1,610	770	840	811	436	375
Guam.....	6,610	3,420	3,190	3,799	2,231	1,568
Northern Mariana Islands.....	780	480	300	368	242	126
Puerto Rico.....	376,580	168,810	207,770	200,747	103,622	97,125
Virgin Islands.....	9,270	4,370	4,900	6,534	3,452	3,083
Foreign countries.....	334,070	147,200	186,870	163,459	76,281	87,178

a. Includes beneficiaries with unknown state code.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

Table 5.J4—Total monthly benefit, by type of benefit and state or other area, December 2001 (in thousands of dollars)

State or area	Total	Retirement			Survivors		Disability		
		Retired workers <sup>a</sup>	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
All areas <sup>b</sup> .....	36,502,038	25,220,785	1,213,567	192,996	4,119,233	1,076,823	4,290,593	32,512	355,529
Alabama.....	620,613	385,352	20,176	3,957	76,713	22,495	101,836	840	9,244
Alaska.....	42,565	27,777	1,102	327	3,772	2,684	6,260	21	621
Arizona.....	661,819	471,839	22,694	2,854	64,455	16,359	77,066	478	6,074
Arkansas.....	376,725	240,561	11,742	2,032	44,079	11,865	60,980	357	5,109
California.....	3,426,450	2,419,648	125,015	20,567	358,828	97,976	373,787	2,530	28,101
Colorado.....	423,930	290,795	16,305	1,852	47,385	12,416	50,531	309	4,338
Connecticut.....	514,766	388,917	13,584	2,649	46,784	12,347	46,418	235	3,833
Delaware.....	115,438	81,429	3,501	592	12,099	3,195	13,492	57	1,072
District of Columbia.....	50,880	35,632	1,075	288	5,093	2,024	6,505	7	255
Florida.....	2,608,198	1,909,668	81,951	12,266	259,586	59,017	263,008	1,786	20,916
Georgia.....	855,079	558,432	23,449	4,438	92,063	33,833	130,799	866	11,199
Hawaii.....	151,425	116,178	4,050	990	12,827	3,947	12,262	96	1,075
Idaho.....	156,206	109,587	6,106	757	16,579	4,514	17,216	121	1,328
Illinois.....	1,552,962	1,099,775	49,079	8,069	183,094	47,557	151,493	988	12,908
Indiana.....	835,033	581,476	26,508	4,051	96,969	24,793	92,781	608	7,846
Iowa.....	435,115	307,888	17,287	1,868	54,861	9,840	39,847	247	3,277
Kansas.....	361,698	256,834	12,901	1,544	42,988	9,569	34,694	162	3,006
Kentucky.....	545,155	319,485	19,435	2,815	71,188	16,965	104,877	1,359	9,029
Louisiana.....	512,450	296,098	23,513	3,570	81,748	23,282	75,505	1,099	7,634
Maine.....	185,804	124,756	5,959	965	20,161	4,605	26,894	149	2,315
Maryland.....	597,970	423,109	17,226	3,044	64,894	21,648	62,887	250	4,912
Massachusetts.....	861,023	612,084	23,439	4,094	87,402	21,287	103,537	479	8,700
Michigan.....	1,417,417	966,155	49,329	7,757	166,130	43,336	168,769	1,233	14,709
Minnesota.....	598,469	429,714	21,549	2,775	67,835	15,537	56,354	249	4,456
Mississippi.....	364,131	218,404	9,622	2,649	41,678	15,870	68,425	599	6,884
Missouri.....	794,396	539,271	24,752	3,866	89,549	23,893	103,818	729	8,519
Montana.....	122,720	84,460	4,719	587	14,358	3,311	13,988	139	1,158
Nebraska.....	225,622	160,457	8,925	1,007	26,966	5,785	20,637	111	1,733
Nevada.....	247,601	180,113	6,446	1,171	21,728	6,262	29,675	155	2,051
New Hampshire.....	168,120	120,983	4,380	718	16,100	4,665	19,245	103	1,926
New Jersey.....	1,211,848	898,165	28,101	5,767	122,002	31,887	115,389	730	9,806
New Mexico.....	207,291	138,294	8,594	1,306	23,032	7,397	26,052	276	2,339
New York.....	2,558,064	1,824,190	68,692	15,241	256,316	68,612	298,187	2,171	24,654
North Carolina.....	1,057,006	721,891	25,648	4,628	100,990	32,175	157,916	834	12,925
North Dakota.....	85,354	57,577	4,266	334	13,273	1,964	7,312	57	572
Ohio.....	1,557,857	1,050,490	64,636	7,930	214,407	43,017	163,114	1,269	12,994
Oklahoma.....	456,195	306,478	15,777	2,235	56,900	14,822	55,266	460	4,258
Oregon.....	472,815	339,258	16,174	2,275	50,069	11,333	49,925	344	3,437
Pennsylvania.....	1,964,668	1,389,793	65,641	8,634	245,520	48,906	190,407	1,446	14,319
Rhode Island.....	155,252	113,368	3,068	642	13,740	3,732	19,122	101	1,480
South Carolina.....	537,308	355,781	13,409	2,554	52,444	19,338	85,991	515	7,276
South Dakota.....	99,980	69,158	4,286	431	12,892	3,246	9,100	27	841
Tennessee.....	764,758	495,467	24,166	3,790	89,059	25,462	116,343	960	9,509
Texas.....	2,046,477	1,365,656	85,224	11,992	269,687	76,142	216,608	2,277	18,891
Utah.....	196,288	140,043	8,372	1,222	18,935	7,359	18,350	103	1,905
Vermont.....	82,333	57,364	2,488	417	8,341	2,096	10,540	73	1,013
Virginia.....	819,775	554,410	25,766	3,974	90,257	26,396	108,910	921	9,141
Washington.....	718,799	513,372	25,849	3,489	72,963	18,805	77,914	529	5,878
West Virginia.....	303,684	173,621	12,691	1,681	46,257	9,139	55,152	925	4,218
Wisconsin.....	750,118	545,747	24,160	3,687	82,165	19,027	69,293	294	5,746
Wyoming.....	62,905	44,829	2,210	245	6,130	1,854	7,001	66	570
Outlying areas									
American Samoa.....	2,354	715	38	102	270	344	764	11	112
Guam.....	5,905	3,505	297	197	651	571	571	19	94
Northern Mariana Islands.....	703	354	19	51	92	125	49	0	14
Puerto Rico.....	347,496	174,711	14,695	4,002	40,703	15,026	88,430	1,539	8,390
Virgin Islands.....	9,274	6,541	346	151	737	374	991	18	115
Foreign countries.....	195,140	121,467	12,951	1,849	43,286	6,561	8,092	179	754

a. Includes special age-72 beneficiaries.

b. Includes beneficiaries with unknown state code.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

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

**Table 5.J5—Number, by age and state or other area, December 2001**

State or area	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> .....	45,874,040	2,997,130	4,022,270	1,919,630	4,002,900	8,871,600	8,154,140	6,939,160	4,871,870	2,701,330	1,354,680	39,330
Alabama.....	841,730	72,460	98,510	48,450	78,330	157,630	137,690	109,610	74,620	42,290	21,650	490
Alaska.....	56,940	7,720	6,530	2,360	5,640	12,160	8,870	6,790	4,140	1,820	910	0
Arizona.....	813,180	52,620	66,390	31,680	75,770	162,070	148,250	125,340	86,230	44,280	20,020	530
Arkansas.....	520,680	39,960	56,810	30,170	49,380	97,820	84,690	70,130	49,380	28,040	13,820	480
California.....	4,247,470	269,690	345,830	157,530	341,990	838,870	771,720	667,500	472,340	254,570	123,900	3,530
Colorado.....	542,210	35,630	47,720	20,410	46,240	111,480	98,660	79,170	56,430	30,480	15,610	380
Connecticut.....	580,180	30,430	42,870	18,580	40,920	106,700	106,720	97,290	72,980	41,740	21,310	640
Delaware.....	137,170	8,710	11,840	5,450	13,080	27,610	25,750	20,100	13,790	7,360	3,380	100
District of Columbia.....	73,390	4,890	6,740	2,780	4,990	12,890	12,730	11,640	8,520	5,320	2,820	70
Florida.....	3,235,390	184,130	229,840	117,620	274,650	623,400	604,850	531,490	371,150	198,820	97,000	2,440
Georgia.....	1,125,190	95,180	122,190	61,060	109,700	225,260	183,370	144,870	99,960	55,440	27,440	720
Hawaii.....	188,920	11,050	12,100	5,270	14,840	37,180	37,420	32,490	21,510	11,550	5,290	220
Idaho.....	199,640	12,630	15,760	7,830	19,370	40,060	35,280	29,080	21,240	12,150	6,130	110
Illinois.....	1,845,500	113,060	143,610	65,730	150,660	356,350	330,720	290,700	209,510	121,610	61,740	1,810
Indiana.....	1,000,050	62,690	88,380	40,640	92,630	193,070	177,740	151,130	105,200	57,670	29,910	990
Iowa.....	541,280	24,380	40,110	17,240	45,110	101,630	98,540	86,580	65,500	39,590	21,740	860
Kansas.....	440,620	25,490	34,280	14,380	34,900	82,650	78,590	68,730	53,090	29,990	17,930	590
Kentucky.....	746,330	58,720	98,470	47,660	70,900	135,330	117,800	97,080	65,660	35,730	18,620	360
Louisiana.....	716,220	68,340	79,350	36,080	64,560	131,180	120,670	98,440	64,560	35,020	17,560	460
Maine.....	253,810	16,660	27,430	12,060	21,020	47,860	43,890	37,790	25,420	13,920	7,530	230
Maryland.....	733,940	50,910	56,890	25,970	61,180	148,200	134,370	114,690	78,540	41,660	20,920	610
Massachusetts.....	1,061,920	61,470	100,380	39,950	70,770	193,120	187,390	170,730	126,690	72,430	37,840	1,150
Michigan.....	1,658,480	108,250	152,060	68,990	153,980	310,890	292,310	252,240	175,640	96,770	45,910	1,440
Minnesota.....	746,100	35,890	56,740	23,020	66,480	145,870	134,070	115,400	86,140	53,130	28,480	880
Mississippi.....	523,460	56,860	69,440	32,680	47,410	91,530	79,650	64,190	43,440	24,300	13,470	490
Missouri.....	1,012,790	69,760	97,250	46,380	92,760	191,220	174,450	145,140	103,280	60,040	31,460	1,050
Montana.....	159,180	10,000	13,040	6,130	15,980	30,820	28,270	22,490	17,830	9,600	4,920	100
Nebraska.....	285,900	15,000	20,420	9,050	22,580	55,270	52,830	45,050	33,140	20,730	11,480	350
Nevada.....	299,910	18,760	21,810	12,990	31,120	68,650	58,910	44,190	25,650	12,730	4,950	150
New Hampshire.....	204,140	12,980	18,820	7,140	18,080	39,530	37,880	30,510	21,080	11,600	6,330	190
New Jersey.....	1,355,570	77,140	99,120	47,730	100,150	261,430	256,250	223,440	158,600	88,680	41,970	1,060
New Mexico.....	285,250	24,380	26,710	11,680	27,370	56,890	50,170	39,750	26,440	14,570	7,080	210
New York.....	3,014,910	188,500	262,340	127,190	245,770	570,740	536,760	462,500	328,830	189,110	99,770	3,400
North Carolina.....	1,373,880	96,820	139,510	75,470	129,530	273,500	233,800	191,790	130,180	68,760	33,510	1,010
North Dakota.....	114,380	4,660	7,630	3,510	9,550	21,280	21,020	18,550	14,020	8,820	5,210	130
Ohio.....	1,921,920	105,520	161,000	72,760	169,040	367,970	353,000	306,820	213,580	116,680	53,840	1,710
Oklahoma.....	597,270	38,840	50,240	27,470	56,670	120,360	105,080	86,310	60,090	33,860	17,890	460
Oregon.....	577,570	29,580	45,310	21,900	55,330	109,850	100,890	90,780	66,670	37,640	19,170	450
Pennsylvania.....	2,365,850	117,920	178,140	86,310	196,830	439,010	444,320	394,090	279,670	155,420	72,270	1,870
Rhode Island.....	191,520	11,010	17,560	8,230	13,750	32,020	32,850	32,510	23,170	13,520	6,660	240
South Carolina.....	703,930	56,670	77,320	40,980	69,070	137,390	116,870	94,770	62,940	32,160	15,280	480
South Dakota.....	136,560	8,370	10,000	4,240	10,540	25,460	25,070	20,850	16,180	9,930	5,680	240
Tennessee.....	1,010,900	75,270	109,830	56,710	97,630	197,430	168,160	135,470	92,350	52,130	25,100	820
Texas.....	2,672,950	201,650	219,290	104,250	247,200	556,100	480,120	389,340	260,520	140,310	72,650	1,520
Utah.....	246,330	19,790	18,900	7,810	21,010	50,820	44,120	36,700	25,960	14,270	6,870	80
Vermont.....	105,330	7,040	10,280	4,510	9,020	20,520	18,600	14,940	10,940	6,160	3,240	80
Virginia.....	1,053,340	71,150	99,860	49,520	97,060	210,790	183,910	152,250	104,420	55,760	27,720	900
Washington.....	858,510	47,140	71,800	32,590	77,180	169,670	149,990	131,320	97,590	52,670	27,700	860
West Virginia.....	394,510	25,470	47,760	26,530	39,110	70,760	64,200	54,900	35,970	19,910	9,520	380
Wisconsin.....	905,450	44,820	68,920	29,770	82,570	174,600	165,160	140,630	104,920	61,290	31,810	960
Wyoming.....	78,420	5,000	6,380	2,960	7,730	16,410	14,460	11,100	7,970	4,200	2,170	40
Outlying areas												
American Samoa.....	5,320	1,870	760	520	560	740	390	260	130	60	30	0
Guam.....	11,370	2,350	940	320	1,150	2,860	1,940	1,150	470	120	70	0
Northern Mariana Islands.....	1,750	510	230	80	150	410	200	100	40	30	0	0
Puerto Rico.....	677,130	78,980	96,830	53,200	71,540	118,410	91,680	73,300	50,090	28,260	14,440	400
Virgin Islands.....	14,020	1,370	930	710	1,740	3,500	2,310	1,680	960	440	360	20
Foreign countries.....	404,640	20,210	12,810	7,330	30,220	85,350	88,130	72,990	46,280	26,150	14,580	590

a. Includes beneficiaries with unknown state code.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

Table 5.J5.1—Number, by race, sex, and state or other area, December 2001

State or area	All races				Adult beneficiaries	
	Total <sup>a</sup>	White	Black	Other <sup>b</sup>	Men	Women
All areas <sup>c</sup> .....	45,874,040	39,114,800	4,696,080	1,900,000	17,972,760	24,053,790
Alabama .....	841,730	636,530	191,870	11,710	316,000	434,030
Alaska .....	56,940	43,690	1,850	11,170	23,590	24,810
Arizona .....	813,180	743,150	21,010	46,840	335,600	415,060
Arkansas .....	520,680	446,810	65,110	7,700	201,210	268,910
California .....	4,247,470	3,460,700	298,060	469,450	1,715,880	2,196,260
Colorado .....	542,210	500,970	18,350	20,720	218,030	281,240
Connecticut .....	580,180	526,040	36,640	14,610	225,700	314,100
Delaware .....	137,170	113,660	20,470	2,670	53,750	72,630
District of Columbia .....	73,390	18,390	52,090	2,440	27,480	39,430
Florida .....	3,235,390	2,825,100	304,010	93,690	1,327,610	1,685,350
Georgia .....	1,125,190	829,550	271,280	21,590	419,320	586,930
Hawaii .....	188,920	50,340	2,200	135,420	78,060	97,260
Idaho .....	199,640	193,510	400	4,940	82,590	101,410
Illinois .....	1,845,500	1,548,470	237,100	53,900	708,110	988,520
Indiana .....	1,000,050	910,880	73,500	12,910	381,990	535,220
Iowa .....	541,280	526,130	8,390	5,250	213,840	293,110
Kansas .....	440,620	408,910	21,580	8,790	170,230	237,680
Kentucky .....	746,330	688,870	44,740	10,730	291,580	377,880
Louisiana .....	716,220	502,660	197,600	13,790	272,200	355,750
Maine .....	253,810	246,530	770	5,350	102,290	129,590
Maryland .....	733,940	546,190	163,760	21,700	280,600	390,530
Massachusetts .....	1,061,920	980,580	41,310	34,200	407,480	572,900
Michigan .....	1,658,480	1,419,600	204,170	30,020	645,060	868,950
Minnesota .....	746,100	716,990	12,690	13,480	295,300	401,210
Mississippi .....	523,460	355,500	158,540	8,310	191,020	262,050
Missouri .....	1,012,790	907,490	90,830	11,800	392,710	531,550
Montana .....	159,180	152,560	360	5,670	66,080	80,570
Nebraska .....	285,900	270,930	9,120	5,180	111,220	155,170
Nevada .....	299,910	263,280	19,320	16,410	131,400	147,190
New Hampshire .....	204,140	199,050	930	3,370	81,150	106,440
New Jersey .....	1,355,570	1,147,890	151,060	51,240	515,910	740,500
New Mexico .....	285,250	250,520	5,200	28,550	116,150	139,590
New York .....	3,014,910	2,466,520	364,420	167,020	1,155,000	1,610,340
North Carolina .....	1,373,880	1,074,640	269,620	26,680	522,390	728,820
North Dakota .....	114,380	110,410	200	3,190	45,840	61,420
Ohio .....	1,921,920	1,707,410	183,180	24,510	749,520	1,026,300
Oklahoma .....	597,270	540,200	33,520	21,810	233,090	314,100
Oregon .....	577,570	553,520	7,310	14,990	237,670	302,110
Pennsylvania .....	2,365,850	2,142,420	179,060	38,120	909,630	1,294,470
Rhode Island .....	191,520	178,380	6,120	5,890	73,340	103,580
South Carolina .....	703,930	513,420	179,300	9,240	265,480	366,370
South Dakota .....	136,560	129,780	500	5,900	53,570	71,900
Tennessee .....	1,010,900	871,010	124,740	12,840	382,240	531,800
Texas .....	2,672,950	2,256,360	287,860	120,990	1,049,780	1,373,070
Utah .....	246,330	235,620	1,510	8,390	98,630	124,090
Vermont .....	105,330	102,630	410	1,540	42,160	54,090
Virginia .....	1,053,340	832,740	193,290	24,270	405,950	556,140
Washington .....	858,510	795,030	21,070	39,520	351,200	446,830
West Virginia .....	394,510	376,050	11,100	6,500	159,030	198,680
Wisconsin .....	905,450	856,700	33,810	11,900	361,970	480,910
Wyoming .....	78,420	75,750	310	2,030	33,330	38,980
Outlying areas						
American Samoa .....	5,320	410	20	4,890	1,520	1,880
Guam .....	11,370	1,330	320	9,580	4,370	4,530
Northern Mariana Islands .....	1,750	200	30	1,510	580	600
Puerto Rico .....	677,130	521,630	50,440	101,160	263,040	311,200
Virgin Islands .....	14,020	2,650	10,280	990	5,660	6,610
Foreign countries .....	404,640	335,640	12,890	52,560	166,770	212,260

a. Includes 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.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

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

**Table 5.J6—Average and median monthly benefit for retired workers and number and percentage distribution, by monthly benefit and state or other area, December 2001**

State or area	Monthly benefit (dollars)		Number	Total	Percentage distribution by dollar amount of benefit									
	Average	Median			Less than 400.00	400.00-499.90	500.00-599.90	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 or more
All areas <sup>a</sup> .....	874.50	881.00	28,841,820	100.0	7.5	7.7	10.2	8.6	8.3	9.3	10.8	11.5	8.6	17.3
Alabama.....	827.20	815.00	465,860	100.0	8.4	8.8	11.5	10.1	9.9	10.1	10.6	10.1	7.3	13.3
Alaska.....	848.20	827.00	32,750	100.0	9.3	9.1	10.6	9.7	8.7	8.4	9.0	9.9	7.6	17.6
Arizona.....	888.30	908.00	531,200	100.0	6.2	7.1	9.9	8.1	8.0	9.7	11.8	12.7	9.2	17.3
Arkansas.....	805.40	786.00	298,680	100.0	7.9	9.4	12.4	11.1	10.8	10.9	10.3	9.8	6.5	10.9
California.....	881.90	883.00	2,743,610	100.0	9.2	7.8	9.8	8.3	7.8	8.5	9.7	10.5	8.3	20.0
Colorado.....	852.10	861.00	341,280	100.0	10.2	8.0	10.0	8.5	7.9	8.8	10.2	10.9	8.7	16.8
Connecticut.....	958.80	972.00	405,620	100.0	4.4	5.4	8.5	7.7	7.4	8.6	11.1	12.4	10.3	24.1
Delaware.....	913.50	942.00	89,140	100.0	4.4	6.8	9.9	8.2	7.1	8.9	11.8	14.2	10.2	18.5
District of Columbia.....	741.00	665.00	48,090	100.0	21.6	10.5	11.5	9.6	8.6	7.5	6.7	5.3	4.4	14.2
Florida.....	870.40	873.00	2,193,890	100.0	6.6	8.2	10.6	8.7	8.7	9.8	11.1	11.6	8.3	16.2
Georgia.....	843.60	824.00	661,970	100.0	7.9	8.2	11.2	10.6	9.8	9.6	9.9	10.1	7.6	15.2
Hawaii.....	864.40	866.00	134,410	100.0	8.8	7.6	9.8	8.5	8.6	10.2	11.2	10.9	7.9	16.5
Idaho.....	853.80	865.00	128,350	100.0	6.5	9.1	10.2	8.5	8.8	10.8	11.7	11.9	8.3	14.1
Illinois.....	915.10	936.00	1,201,790	100.0	6.6	6.5	9.4	7.8	7.3	8.5	10.9	12.2	9.7	21.0
Indiana.....	915.30	938.00	635,280	100.0	4.0	6.4	9.9	7.5	7.6	9.8	12.9	13.8	10.2	18.0
Iowa.....	873.60	887.00	352,450	100.0	5.3	8.0	10.3	8.4	8.8	10.5	12.3	12.7	9.0	14.7
Kansas.....	896.20	904.00	286,590	100.0	5.1	7.5	9.9	8.5	8.8	9.8	11.3	12.2	9.3	17.7
Kentucky.....	820.60	813.00	389,330	100.0	8.9	9.3	11.2	9.8	9.5	9.7	10.7	10.8	7.6	12.5
Louisiana.....	810.30	794.00	365,420	100.0	11.9	9.7	11.2	9.2	8.4	8.7	9.3	10.4	7.1	14.0
Maine.....	805.30	794.00	154,910	100.0	9.7	9.1	11.5	10.1	10.2	10.5	10.6	10.4	6.7	11.4
Maryland.....	879.90	888.00	480,870	100.0	9.4	7.2	9.6	8.0	8.2	8.7	10.1	11.3	8.6	19.0
Massachusetts.....	879.10	879.00	696,240	100.0	8.5	7.7	10.3	8.8	8.1	8.6	9.9	10.5	8.4	19.3
Michigan.....	941.00	962.00	1,026,770	100.0	3.5	6.0	9.2	6.6	7.0	9.6	12.7	14.4	10.7	20.2
Minnesota.....	867.00	882.00	495,620	100.0	7.1	7.9	11.0	8.7	8.0	8.9	10.8	12.3	9.1	16.1
Mississippi.....	792.30	761.00	275,660	100.0	9.6	9.9	12.8	11.1	10.6	10.0	9.7	8.9	6.1	11.4
Missouri.....	863.00	869.00	624,910	100.0	6.8	8.0	10.6	9.1	8.6	9.9	11.1	12.1	8.4	15.4
Montana.....	844.50	853.00	100,010	100.0	7.2	8.7	10.6	9.2	8.9	10.7	11.3	12.3	8.3	12.9
Nebraska.....	856.40	852.00	187,360	100.0	6.5	8.5	10.5	9.6	9.8	10.1	11.0	11.2	8.2	14.8
Nevada.....	882.30	892.00	204,130	100.0	7.2	7.2	9.9	8.6	8.4	9.4	10.3	11.6	9.5	17.9
New Hampshire.....	891.50	896.00	135,710	100.0	5.7	6.7	10.1	8.8	9.2	9.7	11.5	11.2	9.4	17.7
New Jersey.....	965.20	981.00	930,560	100.0	4.5	5.7	8.9	7.5	7.2	8.2	10.0	11.9	10.2	26.0
New Mexico.....	816.10	804.00	169,460	100.0	10.6	9.1	10.7	9.7	9.5	9.9	9.8	10.1	7.2	13.4
New York.....	928.00	935.00	1,965,790	100.0	5.6	6.6	9.2	7.9	7.8	9.1	10.9	12.0	9.4	21.4
North Carolina.....	845.60	831.00	853,740	100.0	6.1	7.6	11.0	10.8	11.0	11.2	11.0	10.6	7.4	13.3
North Dakota.....	817.00	801.00	70,470	100.0	8.6	9.5	11.2	11.0	9.6	10.0	10.0	10.1	7.6	12.5
Ohio.....	891.10	928.00	1,178,840	100.0	7.7	6.9	9.3	7.2	6.9	8.7	12.2	13.3	10.0	17.7
Oklahoma.....	835.00	830.00	367,050	100.0	8.2	8.7	10.9	9.5	9.4	10.4	10.8	11.1	7.6	13.2
Oregon.....	884.40	907.00	383,590	100.0	5.6	7.4	9.9	8.1	7.9	10.1	12.8	13.2	9.4	15.6
Pennsylvania.....	899.20	920.00	1,545,510	100.0	5.0	7.1	9.9	7.8	7.8	9.9	12.7	13.4	9.5	16.9
Rhode Island.....	874.40	869.00	129,650	100.0	6.4	7.4	10.3	9.3	9.0	10.9	11.3	11.0	8.4	16.2
South Carolina.....	844.40	832.00	421,330	100.0	6.6	7.8	11.0	10.5	10.5	11.1	10.9	10.5	7.6	13.6
South Dakota.....	802.20	788.00	86,210	100.0	9.0	10.5	11.5	9.9	10.2	10.4	10.3	10.0	7.1	11.0
Tennessee.....	842.00	827.00	588,420	100.0	7.0	8.6	11.1	10.4	10.1	10.3	10.5	10.4	7.5	14.1
Texas.....	850.70	840.00	1,605,330	100.0	9.6	8.5	10.6	9.1	8.6	8.7	9.5	10.5	7.7	17.1
Utah.....	877.60	906.00	159,570	100.0	8.6	8.0	10.4	7.8	6.8	7.7	10.0	12.3	9.2	19.1
Vermont.....	861.70	864.00	66,570	100.0	5.9	8.1	10.7	8.7	9.9	11.1	11.8	11.5	8.0	14.4
Virginia.....	851.60	841.00	651,010	100.0	8.6	8.0	10.6	9.6	9.3	9.5	10.1	10.5	7.8	16.0
Washington.....	910.70	936.00	563,710	100.0	5.5	6.7	9.6	7.7	7.5	9.0	11.5	13.2	10.1	19.2
West Virginia.....	861.60	884.00	201,500	100.0	6.1	7.9	9.7	8.3	8.7	11.0	13.1	13.3	8.9	12.9
Wisconsin.....	896.30	925.00	608,890	100.0	4.4	7.3	10.4	7.9	7.5	9.4	12.7	14.5	10.1	15.8
Wyoming.....	871.50	879.00	51,440	100.0	6.7	7.8	11.2	8.5	8.1	9.6	10.7	11.5	9.4	16.5
Outlying areas														
American Samoa.....	521.80	463.00	1,370	100.0	32.1	24.1	15.3	10.9	2.9	4.4	3.6	2.9	2.2	1.5
Guam.....	608.60	534.00	5,760	100.0	24.0	20.8	13.7	11.1	9.2	6.3	4.9	2.1	2.8	5.2
Northern Mariana Islands.....	477.90	439.50	740	100.0	45.9	16.2	17.6	4.1	2.7	5.4	1.4	0	1.4	5.4
Puerto Rico.....	577.30	532.00	302,640	100.0	26.6	17.5	16.8	12.1	8.6	5.8	4.5	2.9	1.9	3.2
Virgin Islands.....	739.10	677.00	8,850	100.0	11.4	15.6	14.9	10.5	10.3	8.6	7.6	6.1	4.5	10.5
Foreign countries.....	519.00	480.00	234,030	100.0	38.1	14.7	12.8	8.9	6.8	5.2	4.3	3.4	2.2	3.7

a. Includes beneficiaries with unknown state code.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.



**Table 5.J8—Average and median monthly benefit for disabled workers and number and percentage distribution, by monthly benefit and state or other area, December 2001**

State or area	Monthly benefit (dollars)		Number	Percentage distribution by dollar amount of benefit										
	Average	Median		Total	Less than 400.00	400.00-499.99	500.00-599.99	600.00-699.99	700.00-799.99	800.00-899.99	900.00-999.99	1,000.00-1,099.99	1,100.00-1,199.99	1,200.00 or more
All areas <sup>a</sup> .....	814.90	759.40	5,265,190	100.0	8.3	8.2	13.6	13.0	11.3	9.5	8.0	6.6	5.4	16.3
Alabama.....	784.10	727.00	129,880	100.0	8.5	8.7	15.2	14.1	12.1	10.1	7.3	6.0	4.9	13.2
Alaska.....	796.40	720.50	7,860	100.0	9.0	9.5	15.3	13.1	11.2	9.2	8.0	3.9	4.3	16.4
Arizona.....	845.10	792.00	91,190	100.0	6.7	7.5	13.0	12.7	10.9	9.5	8.3	6.8	6.0	18.6
Arkansas.....	765.70	723.00	79,640	100.0	8.7	9.4	14.8	14.4	12.8	10.5	8.5	5.8	4.9	10.3
California.....	827.80	775.00	451,530	100.0	9.0	8.3	12.7	12.0	10.3	9.1	8.0	6.5	5.6	18.4
Colorado.....	808.00	756.00	62,540	100.0	7.6	8.7	13.4	13.4	12.0	9.5	8.0	6.8	5.9	14.6
Connecticut.....	841.20	778.00	55,180	100.0	6.8	7.6	13.2	12.6	12.0	9.4	7.7	6.8	5.6	18.4
Delaware.....	842.80	788.00	16,010	100.0	8.2	7.1	13.1	12.5	10.2	8.4	8.1	7.4	5.3	19.7
District of Columbia..	760.00	723.00	8,560	100.0	8.3	9.3	13.8	15.9	12.1	12.0	9.0	5.6	4.0	9.9
Florida.....	818.00	766.00	321,540	100.0	7.5	8.2	13.7	12.9	11.5	9.7	8.1	7.0	5.4	16.1
Georgia.....	794.00	745.00	164,730	100.0	7.7	7.9	13.9	14.6	12.4	10.4	8.6	6.7	5.0	12.8
Hawaii.....	838.10	794.00	14,630	100.0	6.1	7.6	14.2	12.0	10.9	9.8	9.1	7.1	6.2	16.9
Idaho.....	801.10	747.00	21,490	100.0	9.8	7.7	15.0	12.5	10.1	9.3	8.4	6.1	6.1	15.0
Illinois.....	842.30	790.00	179,850	100.0	7.4	8.0	12.7	12.2	10.7	9.5	7.8	6.8	5.7	19.2
Indiana.....	823.50	766.00	112,660	100.0	8.4	8.6	13.5	11.9	10.9	9.3	7.7	6.5	5.5	17.8
Iowa.....	788.10	738.00	50,560	100.0	10.0	8.8	14.5	12.3	10.8	9.5	7.5	7.2	5.5	14.0
Kansas.....	793.40	736.00	43,730	100.0	8.7	8.9	15.0	13.1	11.1	9.1	7.8	6.9	5.6	13.8
Kentucky.....	805.30	748.00	130,230	100.0	9.8	9.2	13.4	12.3	10.5	8.8	7.4	6.3	5.4	16.8
Louisiana.....	816.00	760.00	92,530	100.0	9.8	8.7	12.4	12.3	10.8	8.8	7.3	6.5	5.4	18.0
Maine.....	742.90	694.00	36,200	100.0	10.4	9.6	15.1	15.7	12.2	10.2	7.1	5.9	3.9	9.8
Maryland.....	850.60	801.00	73,930	100.0	7.0	6.8	11.8	12.8	11.5	10.2	8.6	6.9	5.3	19.1
Massachusetts.....	805.70	747.00	128,510	100.0	6.8	8.0	14.8	13.9	12.5	10.1	7.9	6.6	5.0	14.4
Michigan.....	878.50	833.00	192,100	100.0	8.1	7.1	11.4	10.7	9.6	8.9	7.5	6.7	6.0	24.0
Minnesota.....	797.30	738.00	70,680	100.0	8.9	8.8	13.9	13.6	11.3	9.9	7.3	5.9	5.0	15.3
Mississippi.....	759.00	708.00	90,150	100.0	8.6	9.6	14.6	16.2	13.0	9.6	7.9	6.0	4.2	10.3
Missouri.....	796.80	740.00	130,300	100.0	8.6	8.5	14.5	13.5	11.3	9.6	8.3	6.1	5.0	14.6
Montana.....	799.80	757.00	17,490	100.0	8.6	9.0	14.1	11.8	11.1	10.1	7.4	7.1	5.5	15.2
Nebraska.....	772.10	706.00	26,730	100.0	9.1	10.0	15.5	14.3	11.1	7.6	8.1	7.3	4.8	12.3
Nevada.....	872.80	828.50	34,000	100.0	6.2	6.7	11.7	11.8	10.5	9.4	8.4	7.4	6.9	21.0
New Hampshire.....	815.50	767.00	23,600	100.0	6.6	8.3	13.4	13.0	12.6	10.7	8.9	6.1	5.2	15.1
New Jersey.....	878.50	828.00	131,350	100.0	6.0	7.1	12.0	11.7	10.6	9.5	8.2	7.2	5.6	22.1
New Mexico.....	782.60	732.00	33,290	100.0	8.7	8.5	15.3	13.6	11.2	10.1	8.0	6.4	5.5	12.8
New York.....	862.10	809.00	345,880	100.0	7.4	7.5	12.4	11.7	10.1	9.0	7.9	7.0	5.7	21.3
North Carolina.....	788.60	748.00	200,240	100.0	7.2	7.9	13.8	14.5	13.5	11.1	8.9	6.5	5.2	11.4
North Dakota.....	764.80	718.50	9,560	100.0	10.9	9.6	14.6	13.2	11.4	9.2	8.3	6.6	4.7	11.5
Ohio.....	810.90	758.00	201,160	100.0	10.0	8.8	13.4	11.9	10.0	8.6	7.6	6.3	6.0	17.3
Oklahoma.....	802.10	758.50	68,900	100.0	9.0	9.1	13.5	12.3	10.3	10.0	8.3	6.9	6.0	14.7
Oregon.....	812.20	760.00	61,470	100.0	9.1	8.1	14.1	12.1	10.9	8.9	8.2	6.6	5.8	16.3
Pennsylvania.....	830.80	782.00	229,190	100.0	8.4	7.5	12.7	12.5	10.5	9.0	8.3	7.3	6.1	17.6
Rhode Island.....	797.10	741.00	23,990	100.0	8.1	8.0	14.5	14.5	11.6	9.5	8.2	6.5	5.1	14.0
South Carolina.....	802.80	759.00	107,120	100.0	6.9	7.1	13.7	14.3	13.4	10.5	9.2	7.0	5.4	12.5
South Dakota.....	742.30	688.00	12,260	100.0	12.3	9.8	14.8	15.1	11.6	9.1	7.1	5.5	5.1	9.7
Tennessee.....	782.90	735.00	148,610	100.0	8.4	8.3	14.3	14.2	12.8	10.3	8.3	6.6	4.9	12.0
Texas.....	806.90	757.00	268,460	100.0	8.6	7.9	13.8	12.7	11.4	10.0	8.4	6.7	5.3	15.1
Utah.....	804.50	734.00	22,810	100.0	10.2	9.8	14.2	12.4	9.6	7.4	7.1	6.2	5.0	18.1
Vermont.....	786.60	738.00	13,400	100.0	8.6	7.7	15.4	13.9	11.8	10.1	8.7	6.2	5.4	12.3
Virginia.....	815.60	761.00	133,540	100.0	8.2	7.6	13.2	13.4	11.8	9.6	8.1	6.9	5.2	16.0
Washington.....	822.70	769.00	94,700	100.0	9.1	8.8	13.2	11.6	10.7	9.3	7.4	6.2	5.5	18.2
West Virginia.....	858.90	813.00	64,210	100.0	9.0	7.5	11.0	11.0	10.3	8.6	7.8	6.9	6.0	21.9
Wisconsin.....	807.30	758.00	85,830	100.0	8.9	9.0	13.9	12.0	11.0	9.2	8.0	6.4	5.9	15.8
Wyoming.....	821.70	755.00	8,520	100.0	8.6	10.4	13.7	11.5	9.5	6.9	6.8	7.3	7.0	18.2
Outlying areas														
American Samoa.....	615.80	592.50	1,240	100.0	27.4	13.7	9.7	12.1	7.3	12.1	8.1	4.0	1.6	4.0
Guam.....	695.90	655.50	820	100.0	14.6	12.2	14.6	14.6	6.1	14.6	8.5	4.9	2.4	7.3
Northern Mariana Islands.....	449.00	296.00	110	b	b	b	b	b	b	b	b	b	b	b
Puerto Rico.....	693.70	649.00	127,480	100.0	7.7	9.6	21.3	20.7	13.9	8.9	6.4	4.5	2.3	4.6
Virgin Islands.....	806.00	760.00	1,230	100.0	7.3	8.1	17.1	11.4	10.6	12.2	7.3	7.3	2.4	16.3
Foreign countries.....	701.20	672.00	11,540	100.0	19.6	9.0	11.9	12.0	11.1	8.6	7.1	5.4	5.4	10.0

a. Includes beneficiaries with unknown state code.

b. Base figure is too small to meet statistical standards for reliability of derived figures.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

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

**Table 5.J9—Average and median monthly benefit for nondisabled widow(er)s and number and percentage distribution, by monthly benefit and state or other area, December 2001**

State or area	Monthly benefit (dollars)		Number	Percentage distribution by dollar amount of benefit										
	Average	Median		Total	Less than 400.00	400.00-499.90	500.00-599.90	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 or more
All areas <sup>a</sup> .....	840.80	843.00	4,624,690	100.0	7.4	5.7	7.4	10.5	12.9	14.6	14.7	10.3	6.3	10.1
Alabama.....	765.60	757.00	92,370	100.0	10.7	8.5	10.3	12.8	13.1	13.4	12.0	8.0	4.5	6.6
Alaska.....	793.40	799.00	4,190	100.0	11.2	8.1	7.4	9.3	14.6	10.5	16.2	11.0	4.5	7.2
Arizona.....	869.90	875.00	69,850	100.0	6.0	4.1	6.0	9.0	13.1	15.8	17.0	11.3	6.8	10.8
Arkansas.....	744.90	732.00	54,940	100.0	11.2	9.1	11.6	13.8	13.3	12.7	11.1	7.3	4.1	5.6
California.....	873.30	870.00	388,610	100.0	7.0	5.3	6.3	9.6	12.0	14.2	14.7	10.9	6.8	13.1
Colorado.....	849.10	853.00	52,850	100.0	7.1	5.7	7.3	10.1	12.7	13.6	15.0	11.2	6.4	10.9
Connecticut.....	930.90	917.00	48,110	100.0	3.5	2.7	4.2	8.0	12.2	15.8	16.3	12.9	9.1	15.1
Delaware.....	905.30	908.00	12,670	100.0	2.8	3.3	6.2	8.4	13.8	14.2	19.2	12.4	8.1	11.6
District of Columbia.....	698.30	647.00	7,020	100.0	21.2	10.8	13.4	9.7	12.7	8.7	7.1	5.4	3.3	7.7
Florida.....	867.30	859.00	284,870	100.0	5.4	4.6	6.8	10.4	13.7	15.5	15.6	10.5	6.3	11.2
Georgia.....	777.50	766.00	109,130	100.0	10.2	8.1	10.5	12.1	13.5	13.0	11.9	8.0	4.7	7.9
Hawaii.....	811.10	812.00	15,000	100.0	8.8	6.5	7.7	10.6	15.1	14.7	13.9	9.1	6.0	7.6
Idaho.....	851.40	850.00	18,450	100.0	4.0	5.2	8.0	10.7	13.9	16.5	16.5	11.0	5.0	9.2
Illinois.....	902.80	901.00	192,610	100.0	4.7	3.7	5.3	8.5	12.2	15.4	16.9	12.2	7.9	13.2
Indiana.....	894.00	896.00	102,660	100.0	3.2	3.3	5.4	8.7	13.1	17.0	19.1	12.5	7.3	10.5
Iowa.....	861.00	853.00	61,640	100.0	3.4	4.4	7.6	11.2	14.6	17.0	15.7	10.4	6.3	9.4
Kansas.....	890.70	876.00	46,270	100.0	3.8	4.0	7.1	10.8	13.2	14.4	15.6	11.1	7.3	12.8
Kentucky.....	757.30	756.00	86,260	100.0	11.2	9.4	10.2	12.4	12.5	13.4	12.2	7.8	4.6	6.2
Louisiana.....	771.40	761.00	97,850	100.0	11.2	8.0	10.0	12.5	13.3	12.5	12.0	8.5	4.5	7.5
Maine.....	796.70	786.00	24,070	100.0	8.0	6.4	8.8	14.0	14.6	14.8	12.0	8.8	4.8	7.8
Maryland.....	850.80	854.00	72,580	100.0	7.7	5.9	6.6	10.1	12.3	14.0	15.3	10.6	6.6	11.0
Massachusetts.....	872.40	870.00	95,910	100.0	7.1	4.6	5.9	9.8	12.6	14.5	14.8	11.3	7.0	12.3
Michigan.....	901.90	897.00	174,560	100.0	3.0	2.9	4.2	8.9	13.3	18.2	18.6	12.8	7.7	10.5
Minnesota.....	849.80	853.50	76,960	100.0	5.4	5.9	7.7	10.5	13.3	14.4	15.3	11.0	6.9	9.7
Mississippi.....	714.30	692.00	52,600	100.0	15.3	10.5	12.0	13.2	12.3	11.3	10.0	6.1	3.5	5.8
Missouri.....	838.30	838.00	100,580	100.0	6.3	5.4	7.8	11.3	13.5	15.4	14.9	10.1	6.4	9.0
Montana.....	833.40	823.50	16,260	100.0	5.2	4.9	9.3	12.2	14.6	15.4	14.7	9.2	5.6	8.9
Nebraska.....	862.80	842.00	30,170	100.0	3.7	5.2	8.3	12.5	13.8	15.2	13.5	9.9	6.7	11.2
Nevada.....	882.80	891.00	23,020	100.0	5.5	4.8	5.9	9.1	12.8	13.4	17.2	12.1	7.5	11.9
New Hampshire.....	890.30	895.50	17,100	100.0	4.7	3.5	5.6	10.1	12.0	14.9	18.1	11.3	7.7	12.0
New Jersey.....	931.00	919.00	124,890	100.0	3.4	2.8	4.7	8.6	12.0	15.3	16.3	13.2	8.7	15.1
New Mexico.....	786.00	784.00	27,280	100.0	10.5	8.1	9.5	11.5	12.3	13.6	12.2	8.5	5.8	7.9
New York.....	892.70	880.00	271,760	100.0	4.4	3.8	6.0	9.9	13.1	15.8	16.0	11.5	7.2	12.4
North Carolina.....	774.40	764.00	121,700	100.0	10.4	8.3	9.8	12.8	13.9	13.3	11.5	8.1	4.5	7.4
North Dakota.....	807.70	785.00	16,060	100.0	5.0	7.7	10.5	13.4	14.9	13.7	13.0	8.0	5.0	8.8
Ohio.....	873.30	883.00	234,180	100.0	6.0	4.2	5.4	8.9	12.0	16.1	17.4	12.2	7.3	10.5
Oklahoma.....	811.70	814.00	66,050	100.0	7.5	6.6	8.7	11.8	13.7	15.3	13.9	9.4	5.3	7.9
Oregon.....	885.00	882.00	53,670	100.0	4.1	3.3	5.5	9.8	13.4	16.9	16.7	12.8	6.9	10.6
Pennsylvania.....	883.50	881.00	265,780	100.0	3.7	3.3	5.3	10.2	13.5	17.3	17.6	12.3	7.0	9.9
Rhode Island.....	879.00	870.50	14,880	100.0	4.2	3.9	7.3	10.1	12.8	17.6	16.1	9.7	6.4	12.0
South Carolina.....	769.40	757.00	62,410	100.0	11.0	8.4	9.9	12.7	13.5	12.8	11.7	7.7	4.6	7.5
South Dakota.....	796.40	772.00	15,640	100.0	5.4	8.2	10.9	13.7	15.6	14.2	11.3	8.1	5.4	7.1
Tennessee.....	785.10	776.00	104,970	100.0	9.6	7.7	9.5	13.0	13.3	13.4	12.6	8.5	4.7	7.6
Texas.....	816.00	809.00	309,660	100.0	8.9	7.1	9.0	11.1	12.7	13.1	12.8	9.4	5.7	10.1
Utah.....	891.70	911.00	19,870	100.0	6.4	4.4	4.9	8.3	11.4	12.9	18.2	12.6	7.3	13.6
Vermont.....	842.70	838.00	9,350	100.0	5.2	5.7	9.1	11.6	12.2	15.4	15.0	10.9	5.2	9.7
Virginia.....	800.30	790.50	105,560	100.0	8.9	7.6	9.3	11.7	13.6	13.6	12.6	8.4	5.5	8.8
Washington.....	899.20	897.00	76,780	100.0	4.3	3.3	5.1	8.6	13.3	15.6	17.6	12.5	7.7	11.9
West Virginia.....	804.40	809.00	53,390	100.0	6.9	6.0	9.0	12.7	14.0	15.9	14.6	9.0	5.6	6.2
Wisconsin.....	884.20	886.00	89,240	100.0	3.2	3.7	5.6	9.7	13.9	16.5	18.2	12.5	6.9	9.8
Wyoming.....	869.90	866.00	6,620	100.0	3.3	4.7	7.9	9.8	14.2	14.5	18.0	10.4	8.5	8.8
Outlying areas														
American Samoa.....	489.30	393.50	360	b	b	b	b	b	b	b	b	b	b	b
Guam.....	592.50	548.00	950	100.0	28.4	14.7	12.6	13.7	9.5	7.4	4.2	5.3	1.1	3.2
Northern Mariana Islands.....	425.20	386.00	130	b	b	b	b	b	b	b	b	b	b	b
Puerto Rico.....	514.80	469.00	70,320	100.0	38.0	17.3	14.5	10.4	7.6	4.8	3.1	1.8	1.0	1.6
Virgin Islands.....	640.20	605.00	1,030	100.0	20.4	11.7	17.5	16.5	8.7	5.8	8.7	6.8	1.0	2.9
Foreign countries.....	564.80	537.00	72,570	100.0	29.4	15.0	14.8	12.1	9.3	7.5	4.6	2.8	1.7	2.9

a. Includes beneficiaries with unknown state code.

b. Base figure is too small to meet statistical standards for reliability of derived figures.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

Table 5.J10—Number of children, by type of benefit and state or other area, December 2001

State or area	Total	Under age 18 of—				Disabled, aged 18 or older, of—				Students, aged 18–19, of—			
		Total	Retired workers	Disabled workers	Deceased workers	Total	Retired workers	Disabled workers	Deceased workers	Total	Retired workers	Disabled workers	Deceased workers
All areas <sup>a</sup> .....	3,847,330	2,997,450	261,260	1,392,600	1,343,590	741,870	192,450	59,370	490,050	108,010	12,920	38,450	56,640
Alabama.....	91,700	72,480	6,120	37,330	29,030	16,260	3,600	1,500	11,160	2,960	210	1,360	1,390
Alaska.....	8,540	7,720	670	2,690	4,360	680	200	20	460	140	20	60	60
Arizona.....	62,520	52,620	4,670	24,240	23,710	8,230	2,250	820	5,160	1,670	270	550	850
Arkansas.....	50,560	39,940	3,130	20,970	15,840	8,930	1,910	1,010	6,010	1,690	170	620	900
California.....	335,330	269,670	31,090	108,340	130,240	59,610	19,230	4,220	36,160	6,050	880	1,810	3,360
Colorado.....	42,940	35,640	2,300	16,720	16,620	6,000	1,700	540	3,760	1,300	120	430	750
Connecticut.....	40,380	30,410	2,580	14,770	13,060	9,160	2,670	460	6,030	810	130	280	400
Delaware.....	10,790	8,710	760	3,940	4,010	1,860	620	150	1,090	220	20	70	130
District of Columbia.....	6,480	4,890	570	1,010	3,310	1,450	230	80	1,140	140	20	20	100
Florida.....	222,430	184,140	20,770	81,330	82,040	32,100	8,710	2,770	20,620	6,190	830	2,220	3,140
Georgia.....	118,940	95,220	6,040	43,360	45,820	19,800	4,080	1,810	13,910	3,920	450	1,300	2,170
Hawaii.....	13,600	11,070	1,600	4,200	5,270	2,310	750	70	1,490	220	70	50	100
Idaho.....	15,640	12,630	900	5,720	6,010	2,430	660	130	1,640	580	100	100	380
Illinois.....	148,870	113,130	10,030	47,980	55,120	31,640	7,540	2,230	21,870	4,100	410	1,380	2,310
Indiana.....	82,840	62,680	4,390	30,780	27,510	17,230	3,990	1,540	11,700	2,930	290	1,090	1,550
Iowa.....	34,330	24,370	1,500	12,250	10,620	8,690	2,480	700	5,510	1,270	120	550	600
Kansas.....	32,710	25,500	1,640	12,090	11,770	6,110	1,640	390	4,080	1,100	140	330	630
Kentucky.....	76,870	58,710	3,590	35,430	19,690	15,940	3,560	1,970	10,410	2,220	190	1,050	980
Louisiana.....	88,270	68,330	5,400	31,160	31,770	17,330	3,970	1,710	11,650	2,610	300	950	1,360
Maine.....	21,930	16,670	1,080	10,860	4,730	4,550	1,210	380	2,960	710	60	300	350
Maryland.....	62,810	50,910	3,970	17,950	28,990	10,980	2,770	500	7,710	920	70	220	630
Massachusetts.....	81,540	61,500	4,290	34,880	22,330	18,260	5,110	1,310	11,840	1,780	260	620	900
Michigan.....	144,460	108,280	8,280	52,860	47,140	32,050	8,240	2,540	21,270	4,130	410	1,510	2,210
Minnesota.....	49,590	35,860	2,380	17,030	16,450	11,890	3,640	550	7,700	1,840	160	700	980
Mississippi.....	70,390	56,900	4,800	29,550	22,550	11,270	2,150	1,420	7,700	2,220	210	1,000	1,010
Missouri.....	88,530	69,760	4,720	34,830	30,210	15,800	3,910	1,500	10,390	2,970	260	1,270	1,440
Montana.....	12,530	10,000	870	4,600	4,530	2,020	580	210	1,230	510	70	250	190
Nebraska.....	19,510	14,990	920	7,120	6,950	3,920	1,260	230	2,430	600	40	240	320
Nevada.....	21,320	18,760	2,160	7,690	8,910	2,050	550	170	1,330	510	80	120	310
New Hampshire.....	16,550	12,980	790	7,160	5,030	3,080	740	230	2,110	490	50	200	240
New Jersey.....	99,160	77,150	6,790	33,850	36,510	19,370	5,340	1,170	12,860	2,640	340	830	1,470
New Mexico.....	29,510	24,380	2,260	9,710	12,410	4,070	1,170	340	2,560	1,060	190	300	570
New York.....	249,570	188,530	19,380	94,260	74,890	56,230	15,090	3,730	37,410	4,810	650	1,850	2,310
North Carolina.....	122,670	96,800	5,420	49,850	41,530	22,550	4,970	2,240	15,340	3,320	420	1,370	1,530
North Dakota.....	7,120	4,670	330	2,230	2,110	2,010	450	90	1,470	440	60	140	240
Ohio.....	146,100	105,490	8,230	51,030	46,230	35,560	9,140	2,570	23,850	5,050	560	1,830	2,660
Oklahoma.....	50,080	38,830	3,020	16,330	19,480	9,130	2,060	770	6,300	2,120	240	830	1,050
Oregon.....	37,790	29,610	2,830	12,660	14,120	7,050	2,160	600	4,290	1,130	130	360	640
Pennsylvania.....	161,750	117,870	8,720	56,230	52,920	39,130	9,760	3,020	26,350	4,750	590	1,730	2,430
Rhode Island.....	14,600	11,010	830	6,220	3,960	3,260	690	310	2,260	330	50	130	150
South Carolina.....	72,080	56,660	3,030	28,310	25,320	13,380	2,810	1,250	9,320	2,040	180	720	1,140
South Dakota.....	11,090	8,370	600	3,570	4,200	2,180	500	110	1,570	540	60	130	350
Tennessee.....	96,860	75,320	5,090	37,270	32,960	18,560	3,920	1,820	12,820	2,980	240	1,340	1,400
Texas.....	250,100	201,700	20,070	75,400	106,230	39,150	10,700	2,800	25,650	9,250	1,320	2,500	5,430
Utah.....	23,610	19,790	1,410	7,740	10,640	3,110	1,100	200	1,810	710	140	190	380
Vermont.....	9,080	7,030	520	4,210	2,300	1,840	450	240	1,150	210	20	50	140
Virginia.....	91,250	71,160	4,830	35,190	31,140	17,570	4,050	1,450	12,070	2,520	260	840	1,420
Washington.....	60,480	47,160	4,340	20,590	22,230	11,200	3,190	850	7,160	2,120	190	810	1,120
West Virginia.....	36,800	25,470	1,940	15,020	8,510	10,390	2,000	1,200	7,190	940	140	420	380
Wisconsin.....	62,570	44,860	3,110	21,770	19,980	15,570	4,320	1,050	10,200	2,140	250	740	1,150
Wyoming.....	6,110	5,000	310	2,300	2,390	880	210	130	540	230	10	80	140
Outlying areas													
American Samoa.....	1,920	1,870	300	690	880	10	0	0	10	40	10	10	20
Guam.....	2,470	2,350	590	450	1,310	90	30	20	40	30	0	0	30
Northern Mariana Islands.....	570	510	250	40	220	50	10	0	40	10	0	0	10
Puerto Rico.....	102,890	78,990	8,470	44,980	25,540	22,580	6,730	2,180	13,670	1,320	290	540	490
Virgin Islands.....	1,750	1,390	290	440	660	310	140	10	160	50	20	0	30
Foreign countries.....	25,610	20,220	6,150	3,220	10,850	4,980	1,480	60	3,440	410	150	50	210

a. Includes beneficiaries with unknown state code.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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

### Table 5.J11—Number and total monthly benefit for beneficiaries in foreign countries, December 2001

Country <sup>a</sup>	Number						Monthly benefit (thousands of dollars)	
	Total	Retired workers <sup>b</sup>	Disabled workers	Widow(er)s <sup>c</sup>	Wives and husbands	Children	All beneficiaries	Retired workers <sup>b</sup>
All countries.....	407,466	235,797	11,872	76,683	57,826	25,288	196,861	122,452
Canada.....	92,418	52,990	2,507	17,323	17,016	2,582	38,670	23,772
Mexico.....	49,734	23,903	1,427	12,151	5,966	6,287	23,065	12,256
Central America and Caribbean.....	20,159	13,609	1,008	1,987	1,336	2,219	12,154	8,768
Barbados.....	1,013	813	25	95	63	17	699	572
Costa Rica.....	2,859	1,876	175	289	195	324	1,906	1,347
Dominican Republic.....	5,608	3,476	401	419	351	961	2,987	2,011
El Salvador.....	774	514	43	76	53	88	414	289
Guatemala.....	1,082	690	56	127	66	143	616	413
Honduras.....	967	590	58	92	64	163	627	420
Jamaica.....	2,735	2,128	60	237	195	115	1,685	1,369
Panama.....	856	516	50	139	61	90	528	338
Trinidad and Tobago.....	829	638	21	81	55	34	557	441
South America.....	12,823	8,460	470	1,862	1,158	873	7,537	5,225
Argentina.....	2,829	1,769	52	513	385	110	1,605	1,078
Brazil.....	1,725	1,022	36	358	178	131	1,074	671
Chile.....	1,089	717	34	173	88	77	714	496
Colombia.....	2,616	1,797	148	302	156	213	1,496	1,059
Ecuador.....	2,203	1,596	109	190	136	172	1,252	941
Peru.....	713	455	33	108	62	55	434	294
Uruguay.....	615	452	27	60	63	13	335	257
Africa.....	1,507	848	95	203	100	261	917	581
Asia.....	40,367	19,157	1,220	9,496	4,867	5,627	22,357	12,557
Cyprus.....	550	314	20	107	65	44	296	188
Hong Kong.....	820	371	7	340	69	33	452	230
India.....	659	415	47	59	62	76	405	266
Israel.....	8,360	4,668	195	1,325	1,246	926	5,006	3,267
Japan.....	6,143	2,926	38	1,725	1,211	243	3,896	2,154
Thailand.....	867	629	58	40	22	118	655	502
Philippines.....	18,271	7,790	559	5,367	1,816	2,739	9,236	4,602
Turkey.....	631	385	26	119	62	39	397	256
Yemen.....	1,684	411	122	127	96	928	663	265
Europe.....	184,803	113,298	5,023	32,795	26,678	7,009	88,657	56,876
Austria.....	2,220	1,441	67	393	258	61	1,114	746
Belgium.....	1,571	986	13	263	253	56	781	520
Croatia.....	1,431	776	152	305	104	94	939	531
Denmark.....	866	510	14	189	104	49	559	342
Finland.....	741	475	21	136	77	32	417	267
France.....	9,457	6,143	90	1,392	1,547	285	4,699	3,303
Germany.....	28,169	17,410	765	4,655	3,974	1,365	12,144	7,446
Greece.....	21,818	12,341	739	4,486	3,392	860	10,313	6,267
Hungary.....	1,706	1,275	94	194	88	55	1,285	1,001
Ireland.....	7,659	5,203	210	1,035	846	365	4,299	3,134
Italy.....	34,878	20,217	859	7,890	4,799	1,113	16,637	10,175
Malta.....	597	308	30	138	70	51	366	208
Netherlands.....	3,860	2,407	64	562	683	144	1,669	1,076
Norway.....	6,096	3,573	122	1,167	1,066	168	2,390	1,441
Poland.....	3,801	2,424	191	691	327	168	2,090	1,318
Portugal.....	11,789	7,826	669	1,549	1,295	450	5,586	3,843
Serbia.....	964	515	61	262	85	41	601	307
Spain.....	8,995	5,235	232	1,817	1,406	305	4,562	2,868
Sweden.....	2,857	1,882	42	414	418	101	1,252	824
Switzerland.....	5,476	3,730	38	607	968	133	2,135	1,497
United Kingdom.....	27,149	16,866	432	4,201	4,635	1,015	13,088	8,572
Oceania.....	5,655	3,532	122	866	705	430	3,504	2,417
Australia.....	4,565	2,879	73	753	621	239	2,830	1,955
New Zealand.....	721	485	26	73	58	79	470	345

a. Countries with 500 or more beneficiaries are shown separately. The total and continent subtotals include all foreign residents.

b. Includes special age-72 beneficiaries.

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

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

CONTACT: Rona Blumenthal (410) 965-0163 or Cherice Jefferies (410) 965-5520.

Table 5.J12—Number of disabled workers, by diagnostic group and state or other area, December 2001

State or area	Total number	Number with diagnosis available	Diagnostic group										Injuries	Other
			Infectious and parasitic diseases <sup>a</sup>	Neoplasms	Endocrine, nutritional, and metabolic	Mental disorders (other than retardation)	Mental retardation	Diseases of the—						
								Nervous system and sense organs	Circulatory system	Respiratory system	Musculo-skeletal system			
All areas .....	5,267,884	5,217,345	100,437	142,760	239,610	1,458,016	273,850	505,146	543,509	170,377	1,231,143	242,279	310,218	
Alabama.....	129,615	128,509	1,468	3,005	6,228	30,115	6,639	11,007	15,663	4,674	35,652	6,769	7,289	
Alaska.....	7,671	7,627	91	261	272	2,274	395	888	612	209	1,759	440	426	
Arizona.....	91,580	90,819	1,569	2,396	3,496	28,849	2,790	9,221	7,843	2,850	22,084	4,681	5,040	
Arkansas.....	80,407	79,741	1,019	2,308	3,650	14,200	4,436	7,601	10,231	3,070	24,688	4,277	4,261	
California.....	448,120	443,756	13,720	12,374	17,560	145,716	12,287	44,564	37,513	9,778	105,281	21,581	23,382	
Colorado.....	62,225	61,586	1,242	1,655	2,131	15,771	2,939	8,103	3,989	2,194	16,523	3,462	3,577	
Connecticut.....	56,086	55,562	1,109	1,565	2,301	19,150	2,931	5,509	4,967	1,587	10,750	2,001	3,692	
Delaware.....	15,541	15,420	407	456	794	4,062	887	1,553	1,549	511	3,673	674	854	
District of Columbia.....	8,417	8,352	663	169	384	2,617	506	875	785	189	1,287	231	646	
Florida.....	324,085	321,325	10,825	9,387	15,569	86,112	10,757	25,748	37,106	10,655	70,729	18,557	25,880	
Georgia.....	164,220	162,525	4,094	4,429	8,782	39,088	9,375	13,340	19,175	6,014	37,410	7,155	13,663	
Hawaii.....	14,844	14,713	337	449	601	5,422	588	1,278	1,717	318	2,505	686	812	
Idaho.....	21,837	21,673	197	593	956	6,153	1,120	2,420	1,754	727	5,516	1,234	1,003	
Illinois.....	182,060	180,390	3,209	5,444	9,429	58,076	11,487	19,035	18,897	5,825	32,231	7,381	9,376	
Indiana.....	113,500	112,170	1,482	3,336	6,918	28,272	9,090	12,229	12,671	4,791	22,420	4,428	6,533	
Iowa.....	48,883	48,363	423	1,399	2,266	13,376	4,548	5,556	4,117	1,754	10,613	2,132	2,179	
Kansas.....	43,490	43,185	539	1,198	2,535	11,355	3,401	4,790	3,883	1,578	8,985	2,314	2,607	
Kentucky.....	131,185	130,137	1,156	2,735	5,223	35,023	8,331	9,380	14,094	5,740	35,890	5,231	7,334	
Louisiana.....	92,767	91,649	1,636	2,385	4,078	16,359	5,681	7,972	12,159	2,507	27,057	4,749	7,066	
Maine.....	36,669	36,481	281	847	1,358	12,047	2,052	3,245	3,219	1,127	9,359	1,627	1,319	
Maryland.....	73,549	72,744	2,210	2,438	3,500	18,634	4,069	8,114	8,713	2,428	14,294	3,351	4,993	
Massachusetts.....	127,427	126,233	2,739	3,315	4,056	48,714	5,621	11,832	9,733	3,360	26,805	4,863	5,195	
Michigan.....	192,028	189,969	1,993	5,185	9,278	62,501	10,097	19,007	19,438	5,916	40,463	7,683	8,408	
Minnesota.....	71,538	70,654	837	2,032	2,265	26,598	5,532	8,149	5,237	1,649	12,358	3,285	2,712	
Mississippi.....	89,511	88,671	1,065	2,290	4,697	22,146	5,401	7,271	11,996	2,916	19,506	4,016	7,367	
Missouri.....	129,368	128,125	1,806	3,224	7,220	30,203	8,584	12,476	13,362	5,258	31,942	6,626	7,424	
Montana.....	17,420	17,285	161	443	577	4,245	828	2,150	1,276	664	4,918	1,080	943	
Nebraska.....	26,611	26,393	306	757	1,323	6,346	1,639	3,305	2,574	960	6,340	1,526	1,317	
Nevada.....	34,041	33,773	704	919	1,442	8,810	851	3,431	3,639	1,344	8,813	1,659	2,161	
New Hampshire.....	24,167	24,042	181	632	765	8,572	1,164	2,578	2,048	760	5,376	1,080	886	
New Jersey.....	130,030	128,495	3,028	4,427	5,265	38,609	4,961	14,057	14,676	3,888	26,687	5,467	7,430	
New Mexico.....	33,238	32,915	537	742	1,403	7,866	1,164	3,520	2,424	1,054	10,148	2,094	1,963	
New York.....	349,198	345,783	9,983	10,036	14,070	87,341	14,694	31,736	35,848	10,649	96,872	14,526	20,028	
North Carolina.....	202,613	201,114	3,511	5,572	11,295	42,407	14,435	16,810	25,353	7,663	48,320	8,296	17,452	
North Dakota.....	9,263	9,192	74	263	308	2,398	816	1,158	887	277	2,110	528	373	
Ohio.....	200,768	198,471	2,102	4,804	9,263	69,232	16,344	17,801	18,811	6,510	33,559	6,644	13,401	
Oklahoma.....	68,373	67,903	862	1,878	3,654	15,918	3,630	6,913	8,063	2,778	18,096	3,275	2,836	
Oregon.....	59,799	59,353	916	1,724	2,522	16,727	3,160	7,562	4,854	1,703	14,017	3,391	2,777	
Pennsylvania.....	228,069	226,112	3,437	6,583	11,274	55,612	13,567	23,819	25,815	7,342	55,766	10,872	12,025	
Rhode Island.....	24,312	24,086	331	646	942	8,277	1,486	2,181	2,120	718	5,315	934	1,136	
South Carolina.....	106,989	106,097	1,586	2,777	5,021	27,297	5,845	8,918	14,019	4,124	25,037	5,063	6,410	
South Dakota.....	12,311	12,211	136	311	384	2,993	992	1,657	1,153	452	3,135	491	507	
Tennessee.....	148,696	147,467	1,824	3,762	6,703	41,287	8,930	12,063	17,148	6,062	34,545	6,035	9,108	
Texas.....	271,978	269,954	7,253	8,297	15,949	59,369	10,698	30,002	31,351	8,113	66,981	13,906	18,035	
Utah.....	22,845	22,716	248	536	1,001	7,079	1,426	2,894	1,562	761	4,858	1,062	1,289	
Vermont.....	12,992	12,899	183	342	592	4,007	702	1,237	1,072	411	2,951	620	782	
Virginia.....	133,678	132,429	2,254	3,882	6,414	30,562	9,240	12,071	15,269	4,956	33,719	5,856	8,206	
Washington.....	94,913	94,331	1,654	2,825	3,903	31,470	4,548	10,281	7,210	2,730	20,118	4,419	5,173	
West Virginia.....	64,250	63,582	463	1,342	3,080	13,037	5,091	4,566	7,832	3,053	17,394	3,482	4,242	
Wisconsin.....	86,342	85,248	945	2,334	3,946	27,180	6,109	10,368	6,883	2,222	17,264	3,811	4,186	
Wyoming.....	8,215	8,168	82	205	330	2,056	471	1,008	681	404	2,071	497	363	
Outlying areas														
Puerto Rico.....	127,572	125,248	1,386	1,572	2,233	53,340	1,302	10,591	9,065	2,935	33,788	5,514	3,522	
Other <sup>b</sup> .....	12,578	11,699	173	274	404	3,146	213	1,306	1,453	219	3,165	717	629	

a. AIDS/HIV records are counted in the Infectious and parasitic diseases group. Before 1990, these records were included in the Other group.

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

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

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5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J13—Number and percentage distribution of disabled workers, by diagnostic group and state or other area, December 2001

State or area	Total number	Number with diagnosis available	Percent	Diagnostic group										
				Infectious and parasitic diseases <sup>a</sup>	Neoplasms	Endocrine, nutritional, and metabolic	Mental disorders (other than retardation)	Mental retardation	Diseases of the—				Injuries	Other
									Nervous system and sense organs	Circulatory system	Respiratory system	Musculo-skeletal system		
All areas .....	5,267,884	5,217,345	100.0	1.9	2.7	4.6	27.9	5.2	9.7	10.4	3.3	23.6	4.6	2.2
Alabama.....	129,615	128,509	100.0	1.1	2.3	4.8	23.4	5.2	8.6	12.2	3.6	27.7	5.3	1.8
Alaska.....	7,671	7,627	100.0	1.2	3.4	3.6	29.8	5.2	11.6	8.0	2.7	23.1	5.8	1.9
Arizona.....	91,580	90,819	100.0	1.7	2.6	3.8	31.8	3.1	10.2	8.6	3.1	24.3	5.2	1.8
Arkansas.....	80,407	79,741	100.0	1.3	2.9	4.6	17.8	5.6	9.5	12.8	3.8	31.0	5.4	1.7
California.....	448,120	443,756	100.0	3.1	2.8	4.0	32.8	2.8	10.0	8.5	2.2	23.7	4.9	1.1
Colorado.....	62,225	61,586	100.0	2.0	2.7	3.5	25.6	4.8	13.2	6.5	3.6	26.8	5.6	2.2
Connecticut.....	56,086	55,562	100.0	2.0	2.8	4.1	34.5	5.3	9.9	8.9	2.9	19.3	3.6	3.2
Delaware.....	15,541	15,420	100.0	2.6	3.0	5.1	26.3	5.8	10.1	10.0	3.3	23.8	4.4	1.3
District of Columbia.....	8,417	8,352	100.0	7.9	2.0	4.6	31.3	6.1	10.5	9.4	2.3	15.4	2.8	1.2
Florida.....	324,085	321,325	100.0	3.4	2.9	4.8	26.8	3.3	8.0	11.5	3.3	22.0	5.8	3.7
Georgia.....	164,220	162,525	100.0	2.5	2.7	5.4	24.1	5.8	8.2	11.8	3.7	23.0	4.4	4.1
Hawaii.....	14,844	14,713	100.0	2.3	3.1	4.1	36.9	4.0	8.7	11.7	2.2	17.0	4.7	.7
Idaho.....	21,837	21,673	100.0	0.9	2.7	4.4	28.4	5.2	11.2	8.1	3.4	25.5	5.7	1.5
Illinois.....	182,060	180,390	100.0	1.8	3.0	5.2	32.2	6.4	10.6	10.5	3.2	17.9	4.1	1.3
Indiana.....	113,500	112,170	100.0	1.3	3.0	6.2	25.2	8.1	10.9	11.3	4.3	20.0	3.9	2.2
Iowa.....	48,883	48,363	100.0	0.9	2.9	4.7	27.7	9.4	11.5	8.5	3.6	21.9	4.4	1.2
Kansas.....	43,490	43,185	100.0	1.2	2.8	5.9	26.3	7.9	11.1	9.0	3.7	20.8	5.4	2.4
Kentucky.....	131,185	130,137	100.0	0.9	2.1	4.0	26.9	6.4	7.2	10.8	4.4	27.6	4.0	2.9
Louisiana.....	92,767	91,649	100.0	1.8	2.6	4.4	17.8	6.2	8.7	13.3	2.7	29.5	5.2	3.5
Maine.....	36,669	36,481	100.0	0.8	2.3	3.7	33.0	5.6	8.9	8.8	3.1	25.7	4.5	.9
Maryland.....	73,549	72,744	100.0	3.0	3.4	4.8	25.6	5.6	11.2	12.0	3.3	19.6	4.6	1.6
Massachusetts.....	127,427	126,233	100.0	2.2	2.6	3.2	38.6	4.5	9.4	7.7	2.7	21.2	3.9	1.1
Michigan.....	192,028	189,969	100.0	1.0	2.7	4.9	32.9	5.3	10.0	10.2	3.1	21.3	4.0	1.0
Minnesota.....	71,538	70,654	100.0	1.2	2.9	3.2	37.6	7.8	11.5	7.4	2.3	17.5	4.6	.8
Mississippi.....	89,511	88,671	100.0	1.2	2.6	5.3	25.0	6.1	8.2	13.5	3.3	22.0	4.5	4.5
Missouri.....	129,368	128,125	100.0	1.4	2.5	5.6	23.6	6.7	9.7	10.4	4.1	24.9	5.2	2.2
Montana.....	17,420	17,285	100.0	0.9	2.6	3.3	24.6	4.8	12.4	7.4	3.8	28.5	6.2	2.3
Nebraska.....	26,611	26,393	100.0	1.2	2.9	5.0	24.0	6.2	12.5	9.8	3.6	24.0	5.8	1.5
Nevada.....	34,041	33,773	100.0	2.1	2.7	4.3	26.1	2.5	10.2	10.8	4.0	26.1	4.9	2.4
New Hampshire.....	24,167	24,042	100.0	0.8	2.6	3.2	35.7	4.8	10.7	8.5	3.2	22.4	4.5	1.0
New Jersey.....	130,030	128,495	100.0	2.4	3.4	4.1	30.0	3.9	10.9	11.4	3.0	20.8	4.3	1.3
New Mexico.....	33,238	32,915	100.0	1.6	2.3	4.3	23.9	3.5	10.7	7.4	3.2	30.8	6.4	1.8
New York.....	349,198	345,783	100.0	2.9	2.9	4.1	25.3	4.2	9.2	10.4	3.1	28.0	4.2	2.2
North Carolina.....	202,613	201,114	100.0	1.7	2.8	5.6	21.1	7.2	8.4	12.6	3.8	24.0	4.1	4.6
North Dakota.....	9,263	9,192	100.0	0.8	2.9	3.4	26.1	8.9	12.6	9.6	3.0	23.0	5.7	.9
Ohio.....	200,768	198,471	100.0	1.1	2.4	4.7	34.9	8.2	9.0	9.5	3.3	16.9	3.3	3.7
Oklahoma.....	68,373	67,903	100.0	1.3	2.8	5.4	23.4	5.3	10.2	11.9	4.1	26.6	4.8	.6
Oregon.....	59,799	59,353	100.0	1.5	2.9	4.2	28.2	5.3	12.7	8.2	2.9	23.6	5.7	1.3
Pennsylvania.....	228,069	226,112	100.0	1.5	2.9	5.0	24.6	6.0	10.5	11.4	3.2	24.7	4.8	1.5
Rhode Island.....	24,312	24,086	100.0	1.4	2.7	3.9	34.4	6.2	9.1	8.8	3.0	22.1	3.9	1.7
South Carolina.....	106,989	106,097	100.0	1.5	2.6	4.7	25.7	5.5	8.4	13.2	3.9	23.6	4.8	1.5
South Dakota.....	12,311	12,211	100.0	1.1	2.5	3.1	24.5	8.1	13.6	9.4	3.7	25.7	4.0	.9
Tennessee.....	148,696	147,467	100.0	1.2	2.6	4.5	28.0	6.1	8.2	11.6	4.1	23.4	4.1	2.6
Texas.....	271,978	269,954	100.0	2.7	3.1	5.9	22.0	4.0	11.1	11.6	3.0	24.8	5.2	1.9
Utah.....	22,845	22,716	100.0	1.1	2.4	4.4	31.2	6.3	12.7	6.9	3.4	21.4	4.7	2.1
Vermont.....	12,992	12,899	100.0	1.4	2.7	4.6	31.1	5.4	9.6	8.3	3.2	22.9	4.8	3.2
Virginia.....	133,678	132,429	100.0	1.7	2.9	4.8	23.1	7.0	9.1	11.5	3.7	25.5	4.4	1.9
Washington.....	94,913	94,331	100.0	1.8	3.0	4.1	33.4	4.8	10.9	7.6	2.9	21.3	4.7	1.8
West Virginia.....	64,250	63,582	100.0	0.7	2.1	4.8	20.5	8.0	7.2	12.3	4.8	27.4	5.5	4.0
Wisconsin.....	86,342	85,248	100.0	1.1	2.7	4.6	31.9	7.2	12.2	8.1	2.6	20.3	4.5	1.6
Wyoming.....	8,215	8,168	100.0	1.0	2.5	4.0	25.2	5.8	12.3	8.3	4.9	25.4	6.1	1.4
Outlying areas														
Puerto Rico.....	127,572	125,248	100.0	1.1	1.3	1.8	42.6	1.0	8.5	7.2	2.3	27.0	4.4	.7
Other <sup>b</sup> .....	12,578	11,699	100.0	1.5	2.3	3.5	26.9	1.8	11.2	12.4	1.9	27.1	6.1	1.5

a. AIDS/HIV records are counted in the Infectious and parasitic diseases group. Before 1990, these records were included in the Other group.  
b. Includes American Samoa, Guam, Northern Mariana Islands, Virgin Islands, and foreign countries.

SOURCE: Social Security Administration, Master Beneficiary Record, 100 percent data.  
CONTACT: Joseph Bondar (410) 965-0162 or Shirley Turpin (410) 965-0181.

Table 5.J14—Number, average and median monthly benefit, by type of disabled beneficiary and state or other area, December 2001

State or area	Total			Disabled workers			Disabled adult children			Disabled widow(er)s		
	Number	Average benefit (dollars)	Median benefit (dollars)	Number	Average benefit (dollars)	Median benefit (dollars)	Number	Average benefit (dollars)	Median benefit (dollars)	Number	Average benefit (dollars)	Median benefit (dollars)
All areas <sup>a</sup> .....	6,209,080	772.60	717.00	5,265,190	814.80	759.40	741,870	537.80	527.00	202,020	535.20	516.00
Alabama.....	152,010	741.40	687.00	129,880	784.00	727.00	16,260	480.20	450.50	162,600	521.60	509.00
Alaska.....	8,730	773.80	705.00	7,860	796.40	720.50	680	565.20	548.50	6,800	581.80	564.00
Arizona.....	102,400	814.00	759.00	91,190	845.20	792.00	8,230	560.60	559.00	82,300	563.60	562.00
Arkansas.....	92,210	725.40	681.00	79,640	765.60	723.00	8,930	470.60	447.00	89,300	468.60	468.50
California.....	524,310	790.80	735.00	451,530	827.80	775.00	59,610	559.20	558.00	596,100	572.40	542.00
Colorado.....	70,450	779.40	724.00	62,540	808.00	756.00	6,000	558.80	563.00	60,000	536.80	511.00
Connecticut.....	66,010	801.00	738.00	55,180	841.20	778.00	9,160	605.00	617.00	91,600	547.80	503.00
Delaware.....	18,370	805.40	742.00	16,010	842.80	788.00	1,860	569.00	543.00	18,600	491.60	481.00
District of Columbia.....	10,300	712.60	672.50	8,560	760.00	723.00	1,450	481.80	453.00	14,500	470.60	470.00
Florida.....	364,090	785.00	730.00	321,540	818.00	766.00	32,100	540.00	533.00	321,000	520.00	493.00
Georgia.....	191,450	752.80	706.00	164,730	794.00	745.00	19,800	502.60	479.00	198,000	487.40	456.00
Hawaii.....	17,320	791.60	738.00	14,630	838.20	794.00	2,310	529.60	524.00	23,100	589.00	565.00
Idaho.....	24,540	771.00	717.00	21,490	801.20	747.00	2,430	551.40	540.00	24,300	584.80	605.50
Illinois.....	219,120	796.80	740.00	179,850	842.40	790.00	31,640	590.60	591.00	316,400	577.20	569.00
Indiana.....	134,560	783.20	724.00	112,660	823.60	766.00	17,230	578.60	588.00	172,300	566.60	568.00
Iowa.....	60,860	747.60	693.50	50,560	788.20	738.00	8,690	550.00	542.00	86,900	542.40	538.00
Kansas.....	51,310	757.80	699.00	43,730	793.40	736.00	6,110	559.00	543.00	61,100	525.60	512.00
Kentucky.....	152,810	759.80	700.00	130,230	805.40	748.00	15,940	477.40	442.00	159,400	543.40	532.50
Louisiana.....	115,410	754.00	699.00	92,530	816.00	760.00	17,330	482.00	447.00	173,300	570.60	542.00
Maine.....	41,900	711.80	668.00	36,200	743.00	694.00	4,550	512.20	506.00	45,500	519.40	524.00
Maryland.....	87,330	807.80	755.00	73,930	850.60	801.00	10,980	573.80	558.50	109,800	563.60	551.50
Massachusetts.....	150,630	767.40	714.00	128,510	805.60	747.00	18,260	550.40	549.00	182,600	519.00	496.00
Michigan.....	232,460	830.40	775.00	192,100	878.60	833.00	32,050	603.40	618.00	320,500	590.60	574.00
Minnesota.....	84,470	756.60	697.00	70,680	797.40	738.00	11,890	552.80	555.00	118,900	521.20	496.00
Mississippi.....	106,050	713.80	670.00	90,150	759.00	708.00	11,270	444.80	417.00	112,700	486.20	458.00
Missouri.....	151,380	759.80	704.00	130,300	796.80	740.00	15,800	533.60	516.00	158,000	525.80	499.50
Montana.....	20,120	761.80	713.00	17,490	799.80	757.00	2,020	514.80	515.00	20,200	489.20	466.00
Nebraska.....	31,450	735.80	672.00	26,730	772.00	706.00	3,920	538.00	523.00	39,200	493.80	485.00
Nevada.....	37,120	847.80	802.50	34,000	872.80	828.50	2,050	599.40	602.00	20,500	530.00	473.00
New Hampshire.....	27,330	782.00	732.00	23,600	815.40	767.00	3,080	576.20	565.50	30,800	541.00	544.00
New Jersey.....	154,810	835.40	777.00	131,350	878.40	828.00	19,370	605.40	606.00	193,700	545.20	513.00
New Mexico.....	38,460	742.60	693.00	33,290	782.60	732.00	4,070	469.60	438.00	40,700	540.20	522.00
New York.....	414,420	814.00	750.00	345,880	862.20	809.00	56,230	579.80	579.00	562,300	533.40	514.00
North Carolina.....	230,650	748.00	710.00	200,240	788.60	748.00	22,550	496.20	478.00	225,500	434.20	415.50
North Dakota.....	11,870	714.00	651.00	9,560	764.80	718.50	2,010	505.80	480.00	20,100	486.20	483.50
Ohio.....	245,720	767.80	708.00	201,160	810.80	758.00	35,560	568.00	566.50	355,600	597.00	605.00
Oklahoma.....	80,820	760.20	709.00	68,900	802.20	758.50	9,130	519.40	506.00	91,300	511.60	503.00
Oregon.....	70,520	782.20	728.00	61,470	812.20	760.00	7,050	577.40	580.00	70,500	579.20	581.50
Pennsylvania.....	277,740	785.20	729.00	229,190	830.80	782.00	39,130	570.00	576.00	391,300	571.60	575.50
Rhode Island.....	27,870	764.60	706.00	23,990	797.00	741.00	3,260	565.40	580.00	32,600	556.60	558.00
South Carolina.....	125,070	756.40	716.00	107,120	802.80	759.00	13,380	484.00	462.00	133,800	465.20	441.00
South Dakota.....	14,820	702.80	655.00	12,260	742.20	688.00	2,180	509.40	498.50	21,800	539.00	540.00
Tennessee.....	174,350	740.60	696.00	148,610	782.80	735.00	18,560	495.80	475.50	185,600	496.80	491.00
Texas.....	319,910	759.40	709.00	268,460	806.80	757.00	39,150	506.00	480.00	391,500	530.20	518.00
Utah.....	26,540	769.80	697.50	22,810	804.40	734.00	3,110	558.40	549.00	31,100	558.60	528.50
Vermont.....	15,760	745.80	695.00	13,400	786.60	738.00	1,840	514.40	518.50	18,400	513.00	543.50
Virginia.....	156,490	772.00	717.00	133,540	815.60	761.00	17,570	515.60	491.00	175,700	529.40	502.00
Washington.....	108,860	792.80	736.00	94,700	822.80	769.00	11,200	593.20	599.00	112,000	591.20	593.50
West Virginia.....	77,910	800.20	741.00	64,210	859.00	813.00	10,390	501.80	486.00	103,900	597.60	593.00
Wisconsin.....	103,860	767.20	710.15	85,830	807.40	758.00	15,570	581.00	585.00	155,700	543.80	526.00
Wyoming.....	9,620	789.80	715.00	8,520	821.80	755.00	880	532.80	530.00	8,800	579.40	535.00
Outlying areas												
American Samoa.....	1,270	615.60	589.00	1,240	615.80	592.50	10	389.00	389.00	100	719.00	719.00
Guam.....	920	658.60	628.00	820	696.00	655.50	90	343.00	351.00	900	430.00	430.00
Northern Mariana Islands.....	160	418.20	292.00	110	449.00	296.00	50	350.40	222.00	500	...	...
Puerto Rico.....	154,910	634.40	610.60	127,480	693.60	649.00	22,580	342.40	326.00	225,800	436.20	410.00
Virgin Islands.....	1,600	727.60	668.00	1,230	806.00	760.00	310	445.00	385.00	3,100	581.80	578.00
Foreign countries.....	17,360	602.80	569.50	11,540	701.20	672.00	4,980	384.60	355.50	49,800	542.40	532.00

a. Includes beneficiaries with unknown state code.

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

NOTES: Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance). ... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or 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 direct deposit status and state or other area, December 2001

State or area	All beneficiaries		Using direct deposit			Not using direct deposit		
	Number	Average monthly benefit (dollars)	Number	Percent	Average monthly benefit (dollars)	Number	Percent	Average monthly benefit (dollars)
All areas.....	45,874,040	795.70	36,469,600	79.5	828.10	9,404,440	20.5	670.20
Alabama.....	841,730	737.30	620,950	73.8	781.10	220,780	26.2	614.10
Alaska.....	56,940	747.50	44,530	78.2	779.20	12,410	21.8	634.00
Arizona.....	813,180	813.90	713,870	87.8	840.00	99,310	12.2	626.20
Arkansas.....	520,680	723.50	391,460	75.2	761.50	129,220	24.8	608.50
California.....	4,247,470	806.70	3,616,150	85.1	827.20	631,320	14.9	689.50
Colorado.....	542,210	781.90	451,790	83.3	804.10	90,420	16.7	670.80
Connecticut.....	580,180	887.30	454,540	78.3	915.20	125,640	21.7	786.20
Delaware.....	137,170	841.60	115,900	84.5	867.50	21,270	15.5	700.20
District of Columbia.....	73,390	693.30	54,350	74.1	720.10	19,040	25.9	616.60
Florida.....	3,235,390	806.10	2,863,620	88.5	827.80	371,770	11.5	639.30
Georgia.....	1,125,190	759.90	844,570	75.1	803.00	280,620	24.9	630.20
Hawaii.....	188,920	801.50	162,180	85.8	819.30	26,740	14.2	693.70
Idaho.....	199,640	782.40	171,970	86.1	802.40	27,670	13.9	658.30
Illinois.....	1,845,500	841.50	1,471,970	79.8	867.10	373,530	20.2	740.50
Indiana.....	1,000,050	835.00	782,930	78.3	864.80	217,120	21.7	727.60
Iowa.....	541,280	803.90	462,730	85.5	822.60	78,550	14.5	693.40
Kansas.....	440,620	820.90	366,500	83.2	842.30	74,120	16.8	715.20
Kentucky.....	746,330	730.40	528,620	70.8	776.20	217,710	29.2	619.30
Louisiana.....	716,220	715.50	480,370	67.1	768.40	235,850	32.9	607.70
Maine.....	253,810	732.10	196,940	77.6	764.90	56,870	22.4	618.40
Maryland.....	733,940	814.70	581,530	79.2	838.60	152,410	20.8	723.80
Massachusetts.....	1,061,920	810.80	840,010	79.1	836.80	221,910	20.9	712.60
Michigan.....	1,658,480	854.60	1,350,120	81.4	881.20	308,360	18.6	738.20
Minnesota.....	746,100	802.10	622,970	83.5	825.00	123,130	16.5	686.30
Mississippi.....	523,460	695.60	394,150	75.3	738.00	129,310	24.7	566.50
Missouri.....	1,012,790	784.40	801,040	79.1	812.50	211,750	20.9	677.80
Montana.....	159,180	770.90	133,560	83.9	791.50	25,620	16.1	663.80
Nebraska.....	285,900	789.20	242,520	84.8	809.40	43,380	15.2	675.90
Nevada.....	299,910	825.60	254,070	84.7	845.10	45,840	15.3	717.30
New Hampshire.....	204,140	823.60	169,310	82.9	844.60	34,830	17.1	721.20
New Jersey.....	1,355,570	894.00	1,081,430	79.8	917.20	274,140	20.2	802.30
New Mexico.....	285,250	726.70	226,140	79.3	769.80	59,110	20.7	561.70
New York.....	3,014,910	848.50	2,368,920	78.6	877.70	645,990	21.4	741.40
North Carolina.....	1,373,880	769.40	1,031,540	75.1	814.70	342,340	24.9	632.80
North Dakota.....	114,380	746.20	93,030	81.3	770.90	21,350	18.7	638.90
Ohio.....	1,921,920	810.60	1,462,690	76.1	839.40	459,230	23.9	718.80
Oklahoma.....	597,270	763.80	474,630	79.5	794.50	122,640	20.5	645.00
Oregon.....	577,570	818.60	515,020	89.2	833.50	62,550	10.8	696.20
Pennsylvania.....	2,365,850	830.40	1,866,420	78.9	854.30	499,430	21.1	741.00
Rhode Island.....	191,520	810.60	150,260	78.5	840.20	41,260	21.5	702.80
South Carolina.....	703,930	763.30	530,910	75.4	809.70	173,020	24.6	620.80
South Dakota.....	136,560	732.10	114,460	83.8	756.60	22,100	16.2	605.40
Tennessee.....	1,010,900	756.50	757,980	75.0	798.10	252,920	25.0	631.70
Texas.....	2,672,950	765.60	2,047,360	76.6	807.60	625,590	23.4	628.30
Utah.....	246,330	796.80	210,910	85.6	818.30	35,420	14.4	669.10
Vermont.....	105,330	781.70	85,780	81.4	806.00	19,550	18.6	674.80
Virginia.....	1,053,340	778.30	804,950	76.4	813.20	248,390	23.6	665.20
Washington.....	858,510	837.30	759,810	88.5	855.90	98,700	11.5	694.00
West Virginia.....	394,510	769.80	254,580	64.5	814.70	139,930	35.5	688.10
Wisconsin.....	905,450	828.40	756,940	83.6	849.70	148,510	16.4	719.90
Wyoming.....	78,420	802.20	66,270	84.5	821.10	12,150	15.5	698.80
Outlying areas								
Puerto Rico.....	677,130	513.20	352,910	52.1	595.70	324,220	47.9	423.40
Other <sup>a</sup> .....	440,840	489.90	271,440	61.6	495.00	169,400	38.4	481.90

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

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

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

CONTACT: Joseph Bondar (410) 965-0162 or Shirley Turpin (410) 965-0181.



5.L OASDI Current-Pay Benefits: With Representative Payee

Table 5.L1—Number and percentage of beneficiaries with representative payee, by type of beneficiary and age, December 2001

Type of beneficiary and age	All beneficiaries	Beneficiaries with representative payee	
		Number	Percentage of all beneficiaries
Total .....	45,874,040	4,809,760	10.5
Adult beneficiaries <sup>a</sup> .....	42,876,590	1,814,600	4.2
Retired workers .....	28,841,820	427,420	1.5
Under 65 .....	2,570,130	5,170	0.2
65–74 .....	14,045,270	128,700	0.9
75–84 .....	9,223,690	144,850	1.6
85 or older .....	3,002,730	148,700	5.0
Disabled workers .....	5,265,190	628,180	11.9
Under 35 .....	358,960	100,350	28.0
35–44 .....	958,750	168,180	17.5
45–54 .....	1,675,560	199,910	11.9
55 or older .....	2,271,920	159,740	7.0
Wives and husbands .....	2,895,150	21,360	0.7
Under 65 .....	481,310	2,720	0.6
65–74 .....	1,474,230	8,350	0.6
75–84 .....	823,750	7,580	0.9
85 or older .....	115,860	2,710	2.3
Widow(er)s <sup>b</sup> .....	4,822,500	138,090	2.9
Under 65 .....	647,470	2,730	0.4
65–74 .....	1,455,220	22,080	1.5
75–84 .....	1,745,760	47,370	2.7
85 or older .....	974,050	65,910	6.8
Disabled widow(er)s .....	202,020	13,870	6.9
Under 55 .....	27,570	2,150	7.8
55–64 .....	174,450	11,720	6.7
Disabled adult children .....	741,870	582,540	78.5
Under 35 .....	209,050	148,540	71.1
35–44 .....	211,620	166,960	78.9
45–54 .....	167,020	137,770	82.5
55 or older .....	154,180	129,270	83.8
Students, aged 18–19 .....	108,010	3,120	2.9
Children under age 18 .....	2,997,450	2,995,160	99.9
In custody of parent payee .....	2,690,600	2,690,600	100.0
Not in custody of parent payee .....	306,850	304,560	99.3

a. Includes 30 special age-72 beneficiaries.

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

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Robert L. Hackendorf (410) 965-5536 or Cherice N. Jefferies (410) 965-5520.

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 1983–2001, 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
Austria.....	712	530	52	82	32	16
Belgium.....	524	381	6	93	37	7
Canada.....	36,695	22,448	1,503	8,050	4,207	487
Finland.....	154	111	<sup>b</sup>	23	<sup>b</sup>	<sup>b</sup>
France.....	3,084	2,220	37	560	198	69
Germany.....	13,334	10,176	587	1,672	715	184
Greece.....	1,808	1,217	78	374	95	44
Ireland.....	970	704	30	155	61	20
Italy.....	7,247	4,657	104	1,379	1,005	102
Luxembourg.....	29	17	<sup>b</sup>	5	<sup>b</sup>	<sup>b</sup>
Netherlands.....	1,678	1,190	9	361	92	26
Norway.....	2,939	1,900	88	603	312	36
Portugal.....	1,619	1,080	87	261	157	34
Spain.....	1,682	1,033	60	380	166	43
Sweden.....	1,175	872	25	214	44	20
Switzerland.....	2,840	2,102	24	552	122	40
United Kingdom.....	12,280	9,075	160	2,249	665	131
<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
Austria.....	199.88	225.39	217.06	63.20	165.22	68.88
Belgium.....	164.26	190.35	377.33	57.22	150.95	54.57
Canada.....	135.66	154.70	330.97	57.09	120.16	88.33
Finland.....	159.67	168.92	<sup>b</sup>	61.26	<sup>b</sup>	<sup>b</sup>
France.....	170.59	198.64	369.49	65.56	152.11	67.10
Germany.....	211.44	236.68	324.00	63.36	140.91	76.21
Greece.....	138.21	148.06	382.53	62.04	133.06	91.14
Ireland.....	185.95	201.45	496.77	74.50	173.41	75.75
Italy.....	147.51	174.74	422.08	58.90	120.80	85.47
Luxembourg.....	195.31	225.12	<sup>b</sup>	55.00	<sup>b</sup>	<sup>b</sup>
Netherlands.....	158.24	184.71	692.33	66.11	147.55	78.65
Norway.....	158.29	176.11	398.56	67.96	163.93	94.78
Portugal.....	150.65	161.29	327.03	63.61	134.87	102.26
Spain.....	139.25	157.53	338.53	57.97	147.92	107.12
Sweden.....	149.76	166.03	324.80	64.56	169.00	90.85
Switzerland.....	152.35	175.12	416.46	61.44	142.70	81.55
United Kingdom.....	202.48	237.11	359.41	69.10	168.75	72.97

a. Includes nondisabled and disabled widow(er)s and mothers and fathers.

b. Not shown to avoid disclosure of information regarding particular individuals.

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

CONTACT: Dana Nichele Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

Table 6.A1—Number, by type of benefit, 1940–2001

Year	Total	Retired workers	Disabled workers	Wives and husbands of—		Children of—			Widowed mothers and fathers	Widow(er)s	Parents	Special age-72 beneficiaries
				Retired workers	Disabled workers	Retired workers	Deceased workers	Disabled workers				
All benefits.....	181,274,076	74,546,196	19,073,002	17,561,823	3,649,243	6,903,917	20,323,712	13,790,650	4,702,522	19,341,835	113,751	1,267,425
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
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

a. January–November.

b. Includes December 1958.

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

NOTES: Benefits not necessarily payable at time of award.

... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

## 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 sex, selected years 1940–2001 (in dollars)**

Year <sup>a</sup>	Average primary insurance amount (dollars)			Average monthly benefit (dollars)						
	Retired workers			Retired workers			Disabled workers			Non-disabled widows
	Total	Men	Women	Total	Men	Women	Total	Men	Women	
1940.....	22.71	23.26	18.38	22.71	23.26	18.38	...	...	...	20.36
1945.....	25.11	25.71	19.99	25.11	25.71	19.99	...	...	...	20.17
1950 (Jan.–Aug.).....	29.03	30.16	22.98	29.03	30.16	22.98	...	...	...	21.65
1950 (Sept.–Dec.).....	33.24	35.32	26.85	33.24	35.32	26.85	...	...	...	36.89
1955.....	69.74	75.86	56.05	69.74	75.86	56.05	...	...	...	49.68
1960.....	83.87	92.03	69.23	81.73	92.03	63.26	91.16	94.02	78.91	62.12
1965 (Jan.–Aug.).....	88.57	96.56	74.99	82.69	90.89	68.78	93.26	97.89	80.27	73.81
1965 (Sept.–Dec.).....	99.36	108.79	82.34	89.20	99.90	71.26	101.30	106.51	86.75	75.37
1970.....	133.94	146.99	113.69	123.82	136.80	103.67	139.79	148.39	115.74	106.95
1975 (Jan.–May).....	216.56	242.76	176.76	196.42	220.35	160.50	220.60	241.48	175.27	185.34
1975 (June–Dec.).....	235.13	264.67	191.56	213.68	241.05	173.31	243.47	266.08	192.13	198.88
1980 (Jan.–May).....	353.80	411.70	270.50	321.10	374.00	244.90	352.10	388.80	269.70	277.50
1980 (June–Dec.).....	396.30	465.50	301.00	359.80	422.90	272.90	396.50	437.90	301.00	312.80
1981 (Jan.–May).....	400.10	467.50	302.60	363.60	424.20	276.00	389.80	431.40	295.00	313.00
1981 (June–Dec.).....	438.80	514.50	332.60	400.10	468.00	304.80	425.60	471.30	320.70	346.30
1982 (Jan.–May).....	425.60	504.20	315.10	388.40	457.50	291.40	416.90	462.40	312.70	350.80
1982 (June–Dec.).....	447.10	532.70	328.50	408.60	483.00	305.50	441.10	489.50	328.00	375.30
1983 (Jan.–Nov.).....	448.00	531.60	330.00	408.20	480.30	306.50	432.40	480.30	317.90	385.10
1983 (Dec.).....	451.20	546.40	325.50	410.20	491.80	302.50	445.30	496.80	333.20	400.50
1984 (Jan.–Nov.).....	457.10	544.40	335.60	414.70	489.40	310.90	443.00	494.00	332.20	406.80
1984 (Dec.).....	471.00	565.70	343.00	429.50	511.30	318.90	461.10	516.50	342.90	428.00
1985 (Jan.–Nov.).....	475.70	566.20	348.00	432.00	509.60	322.20	459.20	514.00	345.00	431.10
1985 (Dec.).....	487.60	588.30	352.00	443.10	530.00	326.10	477.60	535.90	357.20	436.90
1986 (Jan.–Nov.).....	500.30	596.90	363.50	453.10	536.00	335.70	471.50	527.60	358.20	452.10
1986 (Dec.).....	504.60	611.00	361.70	456.90	548.40	334.00	489.00	546.90	369.60	446.20
1987 (Jan.–Nov.).....	516.80	618.90	374.10	466.10	553.60	343.90	487.00	546.80	368.90	462.00
1987 (Dec.).....	536.90	648.80	386.80	484.00	580.00	355.20	517.10	583.40	391.80	477.40
1988 (Jan.–Nov.).....	540.70	648.60	390.40	487.80	580.30	359.00	517.20	581.90	392.60	488.80
1988 (Dec.).....	560.00	679.50	401.20	504.90	607.00	369.20	543.00	612.70	410.00	499.20
1989 (Jan.–Nov.).....	572.80	686.90	412.90	516.60	614.80	379.00	539.90	608.00	414.40	512.90
1989 (Dec.).....	597.50	724.90	425.90	538.70	647.50	392.10	571.20	645.90	437.50	525.70
1990 (Jan.–Nov.).....	609.00	729.70	438.20	550.50	654.60	403.30	566.90	637.80	438.90	541.10
1990 (Dec.).....	626.40	761.00	447.30	559.30	672.10	409.30	600.60	676.90	466.60	566.60
1991 (Jan.–Nov.).....	642.80	768.90	460.40	583.50	692.30	426.10	593.00	666.90	464.20	573.70
1991 (Dec.).....	656.20	793.40	467.40	592.80	709.50	432.10	613.20	689.70	481.50	582.10
1992 (Jan.–Nov.).....	671.60	803.10	483.40	608.60	721.90	446.50	601.60	677.00	474.70	596.90
1992 (Dec.).....	688.30	829.30	493.80	620.70	740.90	454.90	625.70	706.50	490.30	604.00
1993 (Jan.–Nov.).....	697.10	831.50	507.10	630.60	746.20	467.00	621.70	699.80	494.70	620.70
1993 (Dec.).....	716.20	861.70	519.00	645.90	769.80	477.90	649.90	735.70	512.30	618.90
1994 (Jan.–Nov.).....	722.90	862.90	530.30	651.00	771.30	485.40	647.00	731.30	518.50	637.80
1994 (Dec.).....	741.90	892.40	541.50	665.70	794.20	494.50	684.80	776.50	549.00	644.60
1995 (Jan.–Nov.).....	744.30	887.00	551.40	671.70	794.30	505.80	675.70	767.30	546.00	662.50
1995 (Dec.).....	765.30	917.60	563.60	668.40	818.00	516.70	703.40	798.70	568.70	675.40
1996 (Jan.–Nov.).....	769.20	916.80	572.40	693.60	820.50	524.50	693.70	788.90	567.80	683.10
1996 (Dec.).....	788.90	950.20	582.90	708.70	846.00	533.30	727.70	832.00	590.00	690.30
1997 (Jan.–Nov.).....	787.10	951.70	608.50	723.30	854.30	581.30	718.30	820.40	590.70	700.60
1997 (Dec.).....	812.80	982.00	610.40	734.50	876.90	564.40	748.40	851.60	615.10	699.90
1998 (Jan.–Nov.).....	819.50	983.10	620.00	744.70	882.10	577.10	737.00	841.50	610.60	716.70
1998 (Dec.).....	831.10	1,003.20	628.80	754.20	898.40	584.70	762.00	870.30	633.80	711.00
1999 (Jan.–Nov.).....	857.60	1,023.20	649.50	777.10	918.40	599.60	763.90	870.60	636.60	713.30
1999 (Dec.).....	875.70	1,043.90	663.70	791.20	934.30	610.70	792.60	904.30	660.60	708.20
2000 (Jan.–Nov.).....	904.90	1,069.40	685.40	841.60	990.50	643.00	806.40	917.60	673.20	708.70
2000 (Dec.).....	930.00	1,111.00	713.00	842.80	996.50	658.50	846.60	960.20	710.00	715.40
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

a. Some years are shown in several parts to reflect changes in benefit rates during the year.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 6.A3—Number and average monthly benefit, by type of benefit, race, age, and sex, 2001

Age and type of benefit	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>All retired workers <sup>c</sup></b>								
Total .....	1,786,300	889.80	1,452,500	924.10	170,500	790.70	155,600	681.50
62-64 .....	1,206,200	847.10	1,006,000	875.00	106,200	767.10	91,000	631.60
65-69 .....	545,200	987.00	423,800	1,040.90	62,200	831.60	54,600	759.80
70 or older .....	34,900	848.30	22,700	917.10	2,100	774.60	10,000	708.70
<i>Men</i>								
Subtotal .....	991,500	1,042.20	818,200	1,090.10	88,100	870.40	80,100	749.00
62-64 .....	650,000	1,006.40	543,500	1,050.60	56,800	831.70	47,600	711.50
65-69 .....	332,200	1,119.60	268,100	1,175.40	30,600	944.70	30,500	827.00
70 or older .....	9,300	780.70	6,600	881.50	700	767.20	2,000	452.70
<i>Women</i>								
Subtotal .....	794,800	699.70	634,300	709.90	82,400	705.50	75,500	609.90
62-64 .....	556,200	660.90	462,500	668.60	49,400	692.70	43,400	543.90
65-69 .....	213,000	780.20	155,700	809.50	31,600	722.10	24,100	674.80
70 or older .....	25,600	872.80	16,100	931.70	1,400	778.20	8,000	772.80
<b>All disabled workers</b>								
Total .....	669,300	873.30	460,700	927.70	111,800	778.50	95,500	720.50
Under 30 .....	51,500	504.40	29,900	518.30	11,800	480.40	9,800	490.80
30-39 .....	90,600	717.10	53,800	753.50	18,100	677.00	18,600	650.40
40-49 .....	159,700	841.40	105,600	881.30	29,400	787.00	24,600	735.60
50-54 .....	119,600	938.30	83,800	978.50	19,100	877.00	16,600	808.80
55-59 .....	143,800	998.00	106,800	1,048.80	19,900	876.80	16,400	814.90
60 or older .....	104,100	993.80	80,800	1,043.40	13,500	872.40	9,500	738.70
<i>Men</i>								
Subtotal .....	364,500	994.50	252,900	1,070.60	57,400	841.30	53,200	798.50
Under 30 .....	27,400	503.30	15,000	514.30	6,600	466.90	5,800	516.40
30-39 .....	48,000	754.20	27,000	790.70	10,300	717.40	10,700	697.60
40-49 .....	80,700	928.90	53,200	980.40	14,500	855.30	12,900	801.30
50-54 .....	63,300	1,081.90	44,600	1,144.00	10,000	937.10	8,700	929.40
55-59 .....	82,400	1,165.00	62,500	1,226.30	9,800	991.60	9,500	955.60
60 or older .....	62,700	1,165.30	50,600	1,222.40	6,200	1,020.50	5,600	807.00
<i>Women</i>								
Subtotal .....	304,800	728.40	207,800	753.90	54,400	712.30	42,300	622.50
Under 30 .....	24,100	505.60	14,900	522.30	5,200	497.50	4,000	453.80
30-39 .....	42,600	675.20	26,800	716.10	7,800	623.70	7,900	586.40
40-49 .....	79,000	751.90	52,400	780.70	14,900	720.50	11,700	663.30
50-54 .....	56,300	777.00	39,200	790.10	9,100	810.90	7,900	676.00
55-59 .....	61,400	773.80	44,300	798.30	10,100	765.50	6,900	621.20
60 or older .....	41,400	734.20	30,200	743.30	7,300	746.50	3,900	640.50
<b>All wives</b>								
Total .....	227,800	401.20	187,400	426.10	17,200	324.60	21,400	256.00
<i>Wives of retired workers</i>								
Subtotal .....	192,100	429.60	161,100	452.50	13,700	345.80	16,000	283.40
Entitlement based on care of children .....	13,900	378.80	10,300	409.90	1,700	333.30	1,600	246.40
Entitlement based on age .....	178,200	433.50	150,800	455.40	12,000	347.60	14,400	287.50
62-64 .....	129,300	417.50	110,800	436.00	8,200	329.30	9,600	292.00
65-69 .....	42,500	476.60	34,900	511.50	3,000	363.30	4,300	284.50
70 or older .....	6,400	471.00	5,100	494.10	800	476.10	500	226.70
<i>Wives of disabled workers</i>								
Subtotal .....	35,700	248.60	26,300	264.30	3,500	241.30	5,400	174.80
Entitlement based on care of children .....	14,900	166.00	9,700	189.60	1,600	146.20	3,600	111.10
Entitlement based on age .....	20,800	307.70	16,600	307.90	1,900	321.40	1,800	302.20
<b>All husbands</b>								
Total .....	9,900	247.00	5,600	233.30	1,200	250.20	3,000	267.90
Husbands of retired workers .....	8,300	247.90	4,900	1,226.30	700	298.60	2,700	255.40
Husbands of disabled workers .....	1,600	242.30	700	210.30	500	182.50	300	255.40

See footnotes at end of table.

## 6.A OASDI Benefits Awarded

**Table 6.A3—Number and average monthly benefit, by type of benefit, race, age, and sex, 2001—Continued**

Age and type of benefit	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>Children</b>								
Total .....	756,300	...	470,700	...	158,600	...	109,600	...
Children of retired workers .....	112,700	404.60	73,500	437.10	25,200	369.20	12,400	289.20
Children of deceased workers .....	292,000	614.50	182,700	672.90	55,800	525.90	39,200	470.30
Children of disabled workers .....	351,600	232.80	214,500	260.60	77,600	200.00	58,000	174.00
Under age 18 .....	520,300	368.10	307,700	412.80	110,700	303.20	88,200	265.60
Disabled, aged 18 or older .....	37,700	436.90	27,400	455.30	6,800	415.50	3,300	341.90
Students, aged 18–19 .....	198,300	498.80	135,600	527.10	41,100	432.60	18,100	417.80
<b>Widowed mothers and fathers</b>								
Total .....	40,500	648.20	26,700	714.20	4,900	564.20	7,100	464.10
Under 30 .....	5,100	537.40	3,000	614.90	1,000	412.80	900	465.80
30–39 .....	12,900	606.60	9,100	653.60	1,200	459.40	2,000	487.80
40–49 .....	16,700	692.40	11,000	771.80	1,900	625.20	2,900	438.60
50–59 .....	5,500	712.70	3,300	783.30	800	765.70	1,300	483.40
60 or older .....	300	d	300	d	...	...	...	...
Widowed mothers .....	37,400	649.00	24,500	724.60	4,600	566.30	6,700	450.90
Widowed fathers .....	3,100	638.30	2,200	598.80	300	d	400	d
<b>Nondisabled widows and widowers</b>								
Total .....	329,700	886.60	278,200	917.80	31,100	687.10	13,700	670.00
60–64 .....	146,600	820.60	121,800	851.70	16,900	689.10	7,200	625.50
65–69 .....	57,800	864.90	46,600	902.80	7,400	669.00	3,100	758.10
70–74 .....	35,200	930.60	31,000	963.00	2,800	708.00	1,100	601.20
75 or older .....	90,100	990.70	78,800	1,011.10	4,000	697.60	2,300	723.40
Widows .....	313,400	903.40	265,300	933.70	29,400	697.60	12,200	699.40
Widowers .....	16,300	563.60	12,900	590.00	1,700	505.70	1,500	431.10
<b>Disabled widows and widowers</b>								
Total .....	26,400	543.90	17,400	592.00	6,100	408.90	2,800	519.80
50–54 .....	10,400	547.80	6,000	583.10	3,000	463.20	1,400	577.90
55–59 .....	14,300	555.30	10,700	595.90	2,400	385.60	1,100	481.40
60 or older .....	1,700	424.60	700	608.10	700	256.20	300	d
Widows .....	25,100	552.60	16,500	604.70	5,800	409.50	2,700	521.60
Widowers .....	1,300	375.90	900	359.20	300	d	100	d

a. Includes 7,700 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.

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.

... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 6.A4—Number and average monthly benefit for retired and disabled workers, by age and sex, 2001

Type of benefit and age in month of award	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)
Retired workers <sup>b</sup> .....	1,786,300	882.60	991,500	1,033.70	794,800	694.00
62-64 .....	1,206,200	840.10	650,000	998.20	556,200	655.50
62 .....	871,900	802.00	463,900	960.00	408,000	622.30
63 .....	122,700	882.40	66,100	1,040.20	56,600	698.00
64 .....	211,600	972.90	120,000	1,122.50	91,600	776.90
65-69 .....	545,200	979.10	332,200	1,110.60	213,000	774.00
65 .....	493,300	989.30	304,800	1,123.90	188,500	771.70
Disability conversions .....	212,300	887.10	125,800	1,024.20	86,500	687.70
New entitlements .....	281,000	1,066.50	179,000	1,193.90	102,000	843.00
66 .....	20,500	852.00	11,800	917.00	8,700	764.00
67 .....	12,000	826.50	6,500	885.30	5,500	757.00
68 .....	11,400	937.60	5,500	1,008.10	5,900	871.90
69 .....	8,000	964.90	3,600	1,189.20	4,400	781.40
70-74 .....	28,000	899.30	7,300	840.10	20,700	920.10
75 or older .....	6,900	606.40	2,000	533.20	4,900	636.30
Disabled workers .....	669,300	866.40	364,500	986.70	304,800	722.60
Under 25 .....	24,200	417.40	12,500	407.90	11,700	427.60
25-29 .....	27,300	574.10	14,900	576.10	12,400	571.70
30-34 .....	36,300	669.70	18,300	689.30	18,000	649.70
35-39 .....	54,300	739.30	29,700	784.70	24,600	684.60
40-44 .....	73,100	807.40	36,200	876.70	36,900	739.30
45-49 .....	86,600	857.70	44,500	957.80	42,100	751.90
50-54 .....	119,600	931.00	63,300	1,073.40	56,300	770.80
50 .....	22,200	895.90	11,900	968.30	10,300	812.30
51 .....	23,800	861.80	11,600	1,017.40	12,200	713.80
52 .....	21,300	953.30	11,900	1,139.10	9,400	718.00
53 .....	24,200	982.40	13,000	1,116.70	11,200	826.60
54 .....	28,100	956.00	14,900	1,110.90	13,200	781.30
55-59 .....	143,800	990.10	82,400	1,155.80	61,400	767.80
55 .....	27,500	1,005.10	17,400	1,129.20	10,100	791.40
56 .....	22,700	934.90	12,700	1,089.60	10,000	738.50
57 .....	30,800	1,003.40	17,600	1,158.00	13,200	797.20
58 .....	31,500	1,001.60	17,300	1,208.30	14,200	749.70
59 .....	31,300	992.50	17,400	1,176.40	13,900	762.20
60-64 .....	104,100	986.00	62,700	1,156.20	41,400	728.30
60 .....	27,800	991.70	16,800	1,150.70	11,000	749.00
61 .....	28,800	961.70	16,600	1,162.90	12,200	687.90
62 .....	24,300	1,033.20	15,700	1,179.40	8,600	766.20
63 .....	13,400	1,007.30	8,600	1,165.10	4,800	724.70
64 <sup>c</sup> .....	9,800	895.10	5,000	1,063.70	4,800	719.60

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.

c. Includes 700 beneficiaries with awards processed after attainment of age 65.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

## 6.A OASDI Benefits Awarded: Summary

**Table 6.A5—Number and average monthly benefit with reduction for early retirement, by type of benefit, sex and age, 2001**

Type of benefit and age in month of award	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)
All retired workers.....	1,241,700	841.30	669,000	998.80	572,700	657.40
62.....	871,900	802.00	463,900	960.00	408,000	622.30
63.....	122,700	882.40	66,100	1,040.20	56,600	698.00
64.....	199,000	971.60	112,000	1,122.90	87,000	776.80
65.....	43,500	925.40	26,400	1,060.10	17,100	717.40
66 or older.....	4,600	771.00	600	533.30	4,000	806.60
All disabled workers.....	26,900	956.60	16,200	1,095.30	10,700	746.70
62.....	10,000	968.80	6,300	1,081.80	3,700	776.40
63.....	9,300	978.40	5,700	1,123.90	3,600	747.90
64 <sup>b</sup> .....	7,600	913.90	4,200	1,076.50	3,400	713.00
All wives and husbands.....	160,200	391.30	3,400	230.00	156,800	394.80
Wives and husbands of retired workers.....	141,100	405.60	3,000	234.40	138,100	409.40
Wives and husbands of disabled workers.....	19,100	285.80	400	196.80	18,700	287.70
Wives.....	156,800	394.80	...	...	156,800	394.80
62.....	105,600	379.70	...	...	105,600	379.70
63.....	22,000	447.40	...	...	22,000	447.40
64.....	19,300	443.90	...	...	19,300	443.90
65.....	5,700	371.70	...	...	5,700	371.70
66.....	1,400	263.60	...	...	1,400	263.60
67 or older.....	2,800	326.10	...	...	2,800	326.10
Husbands.....	3,400	230.00	3,400	230.00	...	...
All nondisabled widow(er)s.....	166,500	797.50	11,600	592.70	154,900	812.80
Nondisabled widows.....	154,900	812.80	...	...	154,900	812.80
60.....	67,200	803.10	...	...	67,200	803.10
61.....	23,300	852.00	...	...	23,300	852.00
62.....	15,000	878.20	...	...	15,000	878.20
63.....	13,100	848.80	...	...	13,100	848.80
64.....	15,200	886.60	...	...	15,200	886.60
65.....	14,300	655.80	...	...	14,300	655.80
66.....	300	799.90	...	...	300	799.90
67-69.....	1,800	786.60	...	...	1,800	786.60
70 or older.....	4,700	698.70	...	...	4,700	698.70
Nondisabled widowers.....	11,600	592.70	11,600	592.70	...	...

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

b. Includes 600 beneficiaries with awards processed after attainment of age 65.

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.



Table 6.A6—Number, percentage distribution, and average monthly benefit for retired and disabled workers, by state or other area, 2001

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>	1,777,811	100.0	878.00	690,503	100.0	870.60
Alabama	30,383	1.7	848.70	18,422	2.7	840.70
Alaska	2,935	0.2	844.00	1,147	0.2	887.00
Arizona	31,699	1.8	890.50	12,773	1.8	890.80
Arkansas	19,088	1.1	823.30	10,475	1.5	827.70
California	176,115	9.9	867.50	60,015	8.7	842.50
Colorado	22,888	1.3	863.10	7,144	1.0	891.50
Connecticut	21,803	1.2	960.20	7,571	1.1	937.40
Delaware	5,373	0.3	938.30	2,214	0.3	899.10
District of Columbia	3,215	0.2	763.70	1,003	0.1	807.60
Florida	117,862	6.6	850.70	40,223	5.8	853.60
Georgia	47,258	2.7	863.20	20,690	3.0	862.80
Hawaii	7,808	0.4	867.90	2,221	0.3	910.70
Idaho	8,135	0.5	858.40	2,825	0.4	844.90
Illinois	73,763	4.1	908.70	24,594	3.6	910.50
Indiana	39,834	2.2	935.10	13,961	2.0	909.40
Iowa	19,901	1.1	889.50	6,794	1.0	836.40
Kansas	16,157	0.9	895.70	5,670	0.8	855.40
Kentucky	25,759	1.4	836.40	15,164	2.2	829.60
Louisiana	24,209	1.4	809.40	12,453	1.8	835.70
Maine	9,126	0.5	807.20	4,102	0.6	793.70
Maryland	31,690	1.8	893.50	10,955	1.6	915.10
Massachusetts	37,747	2.1	888.80	15,042	2.2	876.00
Michigan	62,856	3.5	968.00	26,334	3.8	935.60
Minnesota	30,182	1.7	909.50	10,005	1.4	871.40
Mississippi	18,418	1.0	813.90	11,331	1.6	807.80
Missouri	37,846	2.1	870.60	17,204	2.5	863.90
Montana	6,396	0.4	826.60	2,093	0.3	835.90
Nebraska	10,577	0.6	870.20	3,754	0.5	823.20
Nevada	14,717	0.8	874.60	5,264	0.8	915.60
New Hampshire	8,365	0.5	921.90	3,309	0.5	876.00
New Jersey	54,880	3.1	964.50	17,796	2.6	982.10
New Mexico	10,982	0.6	815.30	4,232	0.6	823.50
New York	119,535	6.7	922.60	46,119	6.7	924.30
North Carolina	55,890	3.1	873.60	25,181	3.6	856.70
North Dakota	3,846	0.2	822.90	1,121	0.2	824.30
Ohio	70,278	4.0	896.60	25,059	3.6	867.50
Oklahoma	22,972	1.3	840.80	9,567	1.4	849.00
Oregon	22,772	1.3	888.90	8,147	1.2	885.50
Pennsylvania	83,205	4.7	916.30	34,348	5.0	873.80
Rhode Island	6,368	0.4	879.40	2,949	0.4	813.90
South Carolina	28,109	1.6	864.00	13,482	2.0	859.80
South Dakota	4,869	0.3	811.40	1,461	0.2	802.30
Tennessee	39,569	2.2	860.40	17,089	2.5	842.60
Texas	108,203	6.1	851.50	39,998	5.8	854.20
Utah	10,190	0.6	883.40	3,030	0.4	872.00
Vermont	4,046	0.2	885.30	1,643	0.2	815.90
Virginia	43,872	2.5	878.70	17,175	2.5	885.70
Washington	34,887	2.0	918.00	13,434	1.9	899.00
West Virginia	12,751	0.7	875.70	8,304	1.2	889.50
Wisconsin	35,732	2.0	920.70	11,481	1.7	886.90
Wyoming	3,296	0.2	876.70	993	0.1	867.60
Outlying areas						
Puerto Rico	22,380	1.3	605.20	11,617	1.7	737.50
Other <sup>c</sup>	17,074	1.0	477.80	1,525	0.2	662.60

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.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

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 age and sex, 2001

Age in month of award and sex	All initial awards <sup>a</sup>	Benefits received for all entitlement months <sup>b</sup>	Benefits withheld due to earnings		
			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 .....	1,176,600	1,074,000	13,600	61,300	25,100
62 .....	856,900	797,600	9,700	29,700	14,800
63 .....	118,600	102,700	2,400	7,400	4,100
64 .....	201,100	173,700	1,500	24,200	6,200
<i>Men</i>					
Subtotal .....	630,200	570,900	8,500	37,400	13,400
62 .....	454,700	419,100	5,900	17,300	7,700
63 .....	62,900	53,300	1,700	4,100	2,100
64 .....	112,600	98,500	900	16,000	3,600
<i>Women</i>					
Subtotal .....	546,400	503,100	5,100	23,900	11,700
62 .....	402,200	378,500	3,800	12,400	7,100
63 .....	55,700	49,400	700	3,300	2,000
64 .....	88,500	75,200	600	8,200	2,600
<b>Average primary insurance amount<sup>c</sup> (dollars)</b>					
<i>All beneficiaries</i>					
Total .....	976.20	970.10	1,066.30	1,083.20	1,058.30
62 .....	974.50	972.40	1,048.80	1,034.50	1,013.80
63 .....	988.60	973.90	1,154.50	998.60	1,035.20
64 .....	939.20	895.70	947.20	1,099.10	1,076.10
<i>Men</i>					
Subtotal .....	1,199.60	1,194.50	1,207.90	1,239.20	1,249.50
62 .....	1,229.00	1,228.90	1,196.80	1,231.50	1,232.70
63 .....	1,116.70	1,106.10	1,216.60	1,122.80	1,245.20
64 .....	1,103.90	1,062.60	1,106.00	1,230.50	1,218.00
<i>Women</i>					
Subtotal .....	739.10	736.90	848.70	801.60	792.60
62 .....	738.30	738.70	829.50	767.50	787.40
63 .....	759.20	753.10	972.10	784.60	741.50
64 .....	740.80	693.40	734.50	870.10	892.60
<b>Average monthly benefit<sup>c</sup> (dollars)</b>					
<i>All beneficiaries</i>					
Total .....	838.30	834.80	896.60	946.00	919.20
62 .....	799.40	796.20	862.20	841.50	834.10
63 .....	879.90	868.10	1,022.10	886.70	929.50
64 .....	955.20	905.90	955.80	1,094.60	1,053.00
<i>Men</i>					
Subtotal .....	988.10	974.60	991.30	1,083.20	1,060.20
62 .....	958.70	955.10	964.50	975.10	973.70
63 .....	1,038.60	994.30	1,082.10	1,001.30	1,147.30
64 .....	1,120.20	1,046.80	1,063.90	1,207.90	1,184.10
<i>Women</i>					
Subtotal .....	653.00	647.90	704.50	728.70	697.60
62 .....	621.10	620.20	671.10	622.40	635.50
63 .....	688.40	672.80	850.60	700.30	688.20
64 .....	774.80	763.10	698.60	882.10	877.20

a. Includes 5,800 awards for which benefits were withheld for reasons other than earnings.

b. Months of entitlement begin with the month of award and end either in December 2001 or the month before the retired-worker benefit is terminated.

c. Amount for December 2001 or the amount for the latest month of entitlement multiplied by the December benefit increase.

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

NOTE: Excludes persons whose benefits were covered from disabled worker to retired worker in 2001. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

CONTACT: Diane Wallace (410) 965-0165 or Barbara Lingg (410) 965-0156.

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B3—Number and percentage distribution with and without reduction for early retirement, by monthly benefit and sex, 2001

Monthly benefit <sup>a</sup> (dollars) and sex	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All.....	1,786,300	100.0	544,600	100.0	1,241,700	100.0
Less than 450.00.....	220,100	12.3	51,500	9.5	168,600	13.6
450.00–499.90.....	71,500	4.0	13,900	2.6	57,600	4.6
500.00–549.90.....	95,300	5.3	19,400	3.6	75,900	6.1
550.00–599.90.....	93,200	5.2	18,300	3.4	74,900	6.0
600.00–649.90.....	89,800	5.0	24,800	4.6	65,000	5.2
650.00–699.90.....	80,300	4.5	24,700	4.5	55,600	4.5
700.00–749.90.....	70,400	3.9	20,400	3.7	50,000	4.0
750.00–799.90.....	73,700	4.1	22,800	4.2	50,900	4.1
800.00–849.90.....	68,900	3.9	22,000	4.0	46,900	3.8
850.00–899.90.....	63,300	3.5	21,700	4.0	41,600	3.4
900.00–949.90.....	65,700	3.7	20,200	3.7	45,500	3.7
950.00–999.90.....	66,500	3.7	19,400	3.6	47,100	3.8
1,000.00–1,049.90.....	61,300	3.4	21,500	3.9	39,800	3.2
1,050.00–1,099.90.....	61,400	3.4	20,300	3.7	41,100	3.3
1,100.00–1,149.90.....	72,900	4.1	20,400	3.7	52,500	4.2
1,150.00–1,199.90.....	85,000	4.8	18,200	3.3	66,800	5.4
1,200.00–1,249.90.....	92,100	5.2	18,400	3.4	73,700	5.9
1,250.00–1,299.90.....	88,500	5.0	22,600	4.1	65,900	5.3
1,300.00–1,349.90.....	80,300	4.5	24,300	4.5	56,000	4.5
1,350.00–1,399.90.....	45,100	2.5	21,600	4.0	23,500	1.9
1,400.00 or more.....	141,000	7.9	98,200	18.0	42,800	3.4
Average benefit (dollars).....	882.60		976.70		841.30	
Men.....	991,500	100.0	322,500	100.0	669,000	100.0
Less than 450.00.....	80,500	8.1	23,100	7.2	57,400	8.6
450.00–499.90.....	18,300	1.8	3,600	1.1	14,700	2.2
500.00–549.90.....	20,400	2.1	5,700	1.8	14,700	2.2
550.00–599.90.....	22,200	2.2	6,100	1.9	16,100	2.4
600.00–649.90.....	24,500	2.5	8,300	2.6	16,200	2.4
650.00–699.90.....	26,300	2.7	9,300	2.9	17,000	2.5
700.00–749.90.....	23,800	2.4	6,300	2.0	17,500	2.6
750.00–799.90.....	32,300	3.3	10,000	3.1	22,300	3.3
800.00–849.90.....	31,300	3.2	10,200	3.2	21,100	3.2
850.00–899.90.....	32,100	3.2	10,200	3.2	21,900	3.3
900.00–949.90.....	39,600	4.0	11,000	3.4	28,600	4.3
950.00–999.90.....	40,400	4.1	11,800	3.7	28,600	4.3
1,000.00–1,049.90.....	39,200	4.0	12,100	3.8	27,100	4.1
1,050.00–1,099.90.....	41,900	4.2	12,800	4.0	29,100	4.3
1,100.00–1,149.90.....	54,400	5.5	12,200	3.8	42,200	6.3
1,150.00–1,199.90.....	68,900	6.9	12,400	3.8	56,500	8.4
1,200.00–1,249.90.....	75,900	7.7	12,500	3.9	63,400	9.5
1,250.00–1,299.90.....	77,900	7.9	18,100	5.6	59,800	8.9
1,300.00–1,349.90.....	72,700	7.3	19,600	6.1	53,100	7.9
1,350.00–1,399.90.....	39,300	4.0	18,000	5.6	21,300	3.2
1,400.00 or more.....	129,600	13.1	89,200	27.7	40,400	6.0
Average benefit (dollars).....	1,033.70		1,106.30		998.80	
Women.....	794,800	100.0	222,100	100.0	572,700	100.0
Less than 450.00.....	139,600	17.6	28,400	12.8	111,200	19.4
450.00–499.90.....	53,200	6.7	10,300	4.6	42,900	7.5
500.00–549.90.....	74,900	9.4	13,700	6.2	61,200	10.7
550.00–599.90.....	71,000	8.9	12,200	5.5	58,800	10.3
600.00–649.90.....	65,300	8.2	16,500	7.4	48,800	8.5
650.00–699.90.....	54,000	6.8	15,400	6.9	38,600	6.7
700.00–749.90.....	46,600	5.9	14,100	6.3	32,500	5.7
750.00–799.90.....	41,400	5.2	12,800	5.8	28,600	5.0
800.00–849.90.....	37,600	4.7	11,800	5.3	25,800	4.5
850.00–899.90.....	31,200	3.9	11,500	5.2	19,700	3.4
900.00–949.90.....	26,100	3.3	9,200	4.1	16,900	3.0
950.00–999.90.....	26,100	3.3	7,600	3.4	18,500	3.2
1,000.00–1,049.90.....	22,100	2.8	9,400	4.2	12,700	2.2
1,050.00–1,099.90.....	19,500	2.5	7,500	3.4	12,000	2.1
1,100.00–1,149.90.....	18,500	2.3	8,200	3.7	10,300	1.8
1,150.00–1,199.90.....	16,100	2.0	5,800	2.6	10,300	1.8
1,200.00–1,249.90.....	16,200	2.0	5,900	2.7	10,300	1.8
1,250.00–1,299.90.....	10,600	1.3	4,500	2.0	6,100	1.1
1,300.00–1,349.90.....	7,600	1.0	4,700	2.1	2,900	0.5
1,350.00–1,399.90.....	5,800	0.7	3,600	1.6	2,200	0.4
1,400.00 or more.....	11,400	1.4	9,000	4.1	2,400	0.4
Average benefit (dollars).....	694.00		788.50		657.40	

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

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

NOTE: Benefits not necessarily payable at time of award.

CONTACT: Diane Wallace (410) 965-0165 or Barbara Lingg (410) 965-0156.

## 6.B OASDI Benefits Awarded: Retired Workers

**Table 6.B4—Number and percentage distribution with and without reduction for early retirement, by primary insurance amount and sex, 2001**

Primary insurance amount <sup>a</sup> (dollars) and sex	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All .....	1,786,300	100.0	544,600	100.0	1,241,700	100.0
Less than 450.00 .....	210,500	11.8	58,900	10.8	151,600	12.2
450.00–499.90 .....	43,200	2.4	17,600	3.2	25,600	2.1
500.00–549.90 .....	70,700	4.0	21,700	4.0	49,000	3.9
550.00–599.90 .....	73,300	4.1	20,500	3.8	52,800	4.3
600.00–649.90 .....	76,100	4.3	24,300	4.5	51,800	4.2
650.00–699.90 .....	69,300	3.9	23,100	4.2	46,200	3.7
700.00–749.90 .....	69,200	3.9	18,800	3.5	50,400	4.1
750.00–799.90 .....	67,200	3.8	22,500	4.1	44,700	3.6
800.00–849.90 .....	67,300	3.8	22,900	4.2	44,400	3.6
850.00–899.90 .....	63,000	3.5	21,900	4.0	41,100	3.3
900.00–949.90 .....	61,600	3.4	19,900	3.7	41,700	3.4
950.00–999.90 .....	57,300	3.2	18,000	3.3	39,300	3.2
1,000.00–1,049.90 .....	58,600	3.3	20,400	3.7	38,200	3.1
1,050.00–1,099.90 .....	56,500	3.2	19,100	3.5	37,400	3.0
1,100.00–1,149.90 .....	54,300	3.0	18,600	3.4	35,700	2.9
1,150.00–1,199.90 .....	53,900	3.0	17,000	3.1	36,900	3.0
1,200.00–1,249.90 .....	54,500	3.1	17,900	3.3	36,600	2.9
1,250.00–1,299.90 .....	54,800	3.1	22,300	4.1	32,500	2.6
1,300.00–1,349.90 .....	64,000	3.6	24,600	4.5	39,400	3.2
1,350.00–1,399.90 .....	58,600	3.3	22,200	4.1	36,400	2.9
1,400.00 or more .....	402,400	22.5	92,400	17.0	310,000	25.0
Average primary insurance amount (dollars) .....	976.80		952.70		987.30	
Men .....	991,500	100.0	322,500	100.0	669,000	100.0
Less than 450.00 .....	66,600	6.7	23,600	7.3	43,000	6.4
450.00–499.90 .....	8,600	0.9	4,300	1.3	4,300	0.6
500.00–549.90 .....	18,900	1.9	5,900	1.8	13,000	1.9
550.00–599.90 .....	17,100	1.7	6,000	1.9	11,100	1.7
600.00–649.90 .....	21,300	2.1	7,900	2.4	13,400	2.0
650.00–699.90 .....	19,800	2.0	9,700	3.0	10,100	1.5
700.00–749.90 .....	18,900	1.9	6,000	1.9	12,900	1.9
750.00–799.90 .....	25,900	2.6	10,500	3.3	15,400	2.3
800.00–849.90 .....	25,400	2.6	10,500	3.3	14,900	2.2
850.00–899.90 .....	24,700	2.5	10,500	3.3	14,200	2.1
900.00–949.90 .....	27,000	2.7	10,100	3.1	16,900	2.5
950.00–999.90 .....	30,900	3.1	11,200	3.5	19,700	2.9
1,000.00–1,049.90 .....	33,000	3.3	12,000	3.7	21,000	3.1
1,050.00–1,099.90 .....	34,800	3.5	12,500	3.9	22,300	3.3
1,100.00–1,149.90 .....	35,200	3.6	12,900	4.0	22,300	3.3
1,150.00–1,199.90 .....	38,400	3.9	12,400	3.8	26,000	3.9
1,200.00–1,249.90 .....	37,900	3.8	12,900	4.0	25,000	3.7
1,250.00–1,299.90 .....	42,900	4.3	19,100	5.9	23,800	3.6
1,300.00–1,349.90 .....	51,400	5.2	20,400	6.3	31,000	4.6
1,350.00–1,399.90 .....	47,800	4.8	18,100	5.6	29,700	4.4
1,400.00 or more .....	365,000	36.8	86,000	26.7	279,000	41.7
Average primary insurance amount (dollars) .....	1,162.10		1,097.40		1,193.20	
Women .....	794,800	100.0	222,100	100.0	572,700	100.0
Less than 450.00 .....	143,900	18.1	35,300	15.9	108,600	19.0
450.00–499.90 .....	34,600	4.4	13,300	6.0	21,300	3.7
500.00–549.90 .....	51,800	6.5	15,800	7.1	36,000	6.3
550.00–599.90 .....	56,200	7.1	14,500	6.5	41,700	7.3
600.00–649.90 .....	54,800	6.9	16,400	7.4	38,400	6.7
650.00–699.90 .....	49,500	6.2	13,400	6.0	36,100	6.3
700.00–749.90 .....	50,300	6.3	12,800	5.8	37,500	6.5
750.00–799.90 .....	41,300	5.2	12,000	5.4	29,300	5.1
800.00–849.90 .....	41,900	5.3	12,400	5.6	29,500	5.2
850.00–899.90 .....	38,300	4.8	11,400	5.1	26,900	4.7
900.00–949.90 .....	34,600	4.4	9,800	4.4	24,800	4.3
950.00–999.90 .....	26,400	3.3	6,800	3.1	19,600	3.4
1,000.00–1,049.90 .....	25,600	3.2	8,400	3.8	17,200	3.0
1,050.00–1,099.90 .....	21,700	2.7	6,600	3.0	15,100	2.6
1,100.00–1,149.90 .....	19,100	2.4	5,700	2.6	13,400	2.3
1,150.00–1,199.90 .....	15,500	2.0	4,600	2.1	10,900	1.9
1,200.00–1,249.90 .....	16,600	2.1	5,000	2.3	11,600	2.0
1,250.00–1,299.90 .....	11,900	1.5	3,200	1.4	8,700	1.5
1,300.00–1,349.90 .....	12,600	1.6	4,200	1.9	8,400	1.5
1,350.00–1,399.90 .....	10,800	1.4	4,100	1.8	6,700	1.2
1,400.00 or more .....	37,400	4.7	6,400	2.9	31,000	5.4
Average primary insurance amount (dollars) .....	745.60		742.60		746.80	

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

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

NOTE: Benefits not necessarily payable at time of award.

CONTACT: Diane Wallace (410) 965-0165 or Barbara Lingg (410) 965-0156.

Table 6.B5—Number, average age, and percentage distribution, by age and sex, selected years 1940–2001

Year	Total number (thousands)	Average age	Percentage distribution by age <sup>a</sup>									
			Total	62	63	64	65			66–69	70–74	75 or older
							Total	Newly entitled	Disability conversions			
<b>Men</b>												
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
<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

a. Age in year of award for 1940–1980. Age in month of award for 1985–2001.

b. Includes conversions from nondisabled widow(er)s benefits to higher retired-worker benefits.

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1940–1980 are 100 percent data. Data for 1985–2001 are based on a 1 percent sample.

NOTE: . . . = not applicable.

CONTACT: Diane Wallace (410) 965-0165 or Barbara Lingg (410) 965-0156.

## 6.C OASDI Benefits Awarded: Disabled Workers

**Table 6.C1—Number and percentage distribution, by monthly benefit and sex, 2001**

Monthly benefit <sup>a</sup> (dollars)	Total		Men		Women	
	Number	Percent	Number	Percent	Number	Percent
All.....	669,300	100.0	364,500	100.0	304,800	100.0
Less than 100.00.....	5,300	0.8	2,500	0.7	2,800	0.9
100.00–149.90.....	5,100	0.8	1,300	0.4	3,800	1.2
150.00–199.90.....	7,800	1.2	2,800	0.8	5,000	1.6
200.00–249.90.....	11,400	1.7	5,000	1.4	6,400	2.1
250.00–299.90.....	13,000	1.9	4,400	1.2	8,600	2.8
300.00–349.90.....	12,700	1.9	4,500	1.2	8,200	2.7
350.00–399.90.....	13,900	2.1	5,000	1.4	8,900	2.9
400.00–449.90.....	17,700	2.6	6,800	1.9	10,900	3.6
450.00–499.90.....	21,800	3.3	8,300	2.3	13,500	4.4
500.00–549.90.....	37,100	5.5	13,700	3.8	23,400	7.7
550.00–599.90.....	41,000	6.1	16,600	4.6	24,400	8.0
600.00–649.90.....	39,100	5.8	14,100	3.9	25,000	8.2
650.00–699.90.....	32,200	4.8	13,200	3.6	19,000	6.2
700.00–749.90.....	36,100	5.4	16,300	4.5	19,800	6.5
750.00–799.90.....	30,600	4.6	15,200	4.2	15,400	5.1
800.00–849.90.....	34,500	5.2	16,600	4.6	17,900	5.9
850.00–899.90.....	26,800	4.0	14,400	4.0	12,400	4.1
900.00–949.90.....	26,200	3.9	14,500	4.0	11,700	3.8
950.00–999.90.....	24,100	3.6	13,700	3.8	10,400	3.4
1,000.00–1,049.90.....	24,400	3.6	14,000	3.8	10,400	3.4
1,050.00–1,099.90.....	19,500	2.9	12,300	3.4	7,200	2.4
1,100.00–1,149.90.....	21,700	3.2	15,400	4.2	6,300	2.1
1,150.00–1,199.90.....	19,500	2.9	13,500	3.7	6,000	2.0
1,200.00–1,249.90.....	18,000	2.7	13,100	3.6	4,900	1.6
1,250.00–1,299.90.....	15,500	2.3	11,500	3.2	4,000	1.3
1,300.00–1,349.90.....	13,500	2.0	9,900	2.7	3,600	1.2
1,350.00–1,399.90.....	15,000	2.2	11,400	3.1	3,600	1.2
1,400.00 or more.....	85,800	12.8	74,500	20.4	11,300	3.7
Average monthly benefit (dollars).....	866.40		986.70		722.60	

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

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

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Table 6.C2—Number, average age, and percentage distribution, by age and sex, selected years 1957–2001

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

a. Age in year of award for 1957–1984. Age in month of award for 1985–2001.

b. Includes awards processed after attainment of age 65.

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1957–1984 are 100 percent data. Data for 1985–2001 are based on a 1 percent sample.

NOTE: ... = not applicable.

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6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C3—Number and percentage distribution, by diagnostic group, age, and sex, 2001

Diagnostic group <sup>a</sup>	Total				Men				Women			
	Total	Under 35	35–49	50 or older	Total	Under 35	35–49	50 or older	Total	Under 35	35–49	50 or older
Total number.....	690,503	83,750	217,253	389,500	374,355	45,836	112,112	216,407	316,148	37,914	105,141	173,093
Number with diagnosis available.....	688,930	83,260	216,726	388,944	373,525	45,552	111,868	216,105	315,405	37,708	104,858	172,839
Infectious and parasitic diseases <sup>b</sup> .....	11,617	1,818	6,414	3,385	8,477	1,312	4,960	2,205	3,140	506	1,454	1,180
Neoplasms.....	68,767	3,769	19,001	45,997	36,016	1,970	8,895	25,151	32,751	1,799	10,106	20,846
Endocrine, nutritional, and metabolic diseases.....	21,542	1,553	6,261	13,728	11,039	697	3,057	7,285	10,503	856	3,204	6,443
Diseases of blood and blood-forming organs.....	2,383	711	737	935	1,142	339	302	501	1,241	372	435	434
Mental disorders												
Mental retardation.....	24,541	13,466	7,883	3,192	14,987	8,077	4,931	1,979	9,554	5,389	2,952	1,213
Other.....	150,714	32,876	65,676	52,162	71,760	17,356	29,486	24,918	78,954	15,520	36,190	27,244
Diseases of the—												
Nervous system and sense organs.....	58,426	9,249	19,826	29,351	30,015	4,660	9,404	15,951	28,411	4,589	10,422	13,400
Circulatory system.....	81,666	2,137	14,625	64,904	55,964	1,229	9,325	45,410	25,702	908	5,300	19,494
Respiratory system.....	28,898	736	4,689	23,473	15,285	281	2,098	12,906	13,613	455	2,591	10,567
Digestive system.....	15,109	1,087	6,460	7,562	9,286	490	4,070	4,726	5,823	597	2,390	2,836
Genitourinary system.....	15,756	2,369	5,805	7,582	9,691	1,355	3,567	4,769	6,065	1,014	2,238	2,813
Skin and subcutaneous tissue.....	1,560	191	641	728	648	61	276	311	912	130	365	417
Musculoskeletal system.....	169,962	6,921	46,005	117,036	85,616	3,358	23,563	58,695	84,346	3,563	22,442	58,341
Congenital anomalies.....	1,036	460	307	269	544	243	154	147	492	217	153	122
Injuries.....	28,478	4,621	9,695	14,162	18,799	3,383	6,558	8,858	9,679	1,238	3,137	5,304
Other.....	8,475	1,296	2,701	4,478	4,256	741	1,222	2,293	4,219	555	1,479	2,185
Percentage with diagnosis available.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Infectious and parasitic diseases <sup>b</sup> .....	1.7	2.2	3.0	0.9	2.3	2.9	4.4	1.0	1.0	1.3	1.4	0.7
Neoplasms.....	10.0	4.5	8.8	11.8	9.6	4.3	8.0	11.6	10.4	4.8	9.6	12.1
Endocrine, nutritional, and metabolic diseases.....	3.1	1.9	2.9	3.5	3.0	1.5	2.7	3.4	3.3	2.3	3.1	3.7
Diseases of blood and blood-forming organs.....	0.3	0.9	0.3	0.2	0.3	0.7	0.3	0.2	0.4	1.0	0.4	0.3
Mental disorders												
Mental retardation.....	3.6	16.2	3.6	0.8	3.8	17.7	4.4	0.9	3.0	14.3	2.8	0.7
Other.....	21.9	39.5	30.3	13.4	19.2	38.1	26.4	11.5	25.0	41.2	34.5	15.8
Diseases of the—												
Nervous system and sense organs.....	8.5	11.1	9.1	7.5	8.1	10.2	8.4	7.4	9.0	12.2	9.9	7.8
Circulatory system.....	11.9	2.6	6.7	16.7	15.4	2.7	8.3	21.0	8.1	2.4	5.1	11.3
Respiratory system.....	4.2	0.9	2.2	6.0	4.1	0.6	1.9	6.0	4.3	1.2	2.5	6.1
Digestive system.....	2.2	1.3	3.0	1.9	2.5	1.1	3.6	2.2	1.8	1.6	2.3	1.6
Genitourinary system.....	2.3	2.8	2.7	1.9	2.6	3.0	3.2	2.2	1.9	2.7	2.1	1.6
Skin and subcutaneous tissue.....	0.2	0.2	0.3	0.2	0.2	0.1	0.2	0.1	0.3	0.3	0.3	0.2
Musculoskeletal system.....	24.7	8.3	21.2	30.1	22.9	7.4	21.1	27.2	26.7	9.4	21.4	33.8
Congenital anomalies.....	0.2	0.6	0.1	0.1	0.1	0.5	0.1	0.1	0.2	0.6	0.1	0.1
Injuries.....	4.1	5.6	4.5	3.6	5.0	7.4	5.9	4.1	3.1	3.3	3.0	3.1
Other.....	1.2	1.6	1.2	1.2	1.1	1.6	1.1	1.1	1.3	1.5	1.4	1.3

a. Classification based on impairment codes established by SSA.

b. Effective 1999, the Listing of Impairments (which describes medical conditions and specific findings that SSA considers severe enough to show that an individual is disabled without having to consider the remaining steps of the sequential evaluation process) was changed to eliminate awards based solely on obesity.

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

NOTE: Effective 2001, SSA initiated a special review of 130,000 Supplemental Security Income (SSI) recipients who are potentially eligible for Social Security disability benefits due to earnings while receiving SSI. Many of these claims awarded in 2001 were for individuals under age 35 who were diagnosed with a mental disorder.

CONTACT: Terry Dodson (410) 965-0143.



Table 6.C7—Number of applications, awards, ratio of awards to applications, and awards per 1,000 insured workers, selected years, 1960–2001

Year	Number of applications (thousands)	Number of awards (thousands)	Awards as a percentage of applications	Awards per 1,000 insured workers
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	645.8	48.3	5.1
1996	1,279.2	624.3	48.8	4.9
1997	1,180.2	587.4	49.8	4.5
1998	1,169.3	608.1	52.0	4.6
1999	1,200.1	620.5	51.7	4.6
2000	1,330.6	621.7	46.7	4.6
2001	1,499.1	691.3	46.1	5.1

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 1950–2001**

Year	Total	Wives entitled solely because of age	Wives entitled because of children in their care	Husbands
<b>Wives and husbands of retired workers</b>				
1950.....	162,768	152,310	9,646	812
1955.....	288,915	263,816	21,692	3,407
1960.....	339,987	305,713	32,254	2,020
1965.....	321,015	275,717	44,087	1,211
1970.....	339,447	286,867	51,378	1,202
1975.....	350,558	289,600	60,184	774
1980.....	360,693	294,892	55,401	10,400
1981.....	338,540	277,641	50,993	9,906
1982.....	349,967	302,739	36,229	10,999
1983.....	356,274	308,922	35,309	12,043
1984.....	342,691	298,855	30,972	12,864
1985.....	356,558	312,849	30,454	13,255
1986.....	358,115	315,427	28,925	13,763
1987.....	333,333	294,499	26,099	12,735
1988.....	316,929	281,760	23,045	12,124
1989.....	310,498	278,655	21,285	10,558
1990.....	308,980	277,238	21,395	10,347
1991.....	307,000	276,236	21,154	9,610
1992.....	304,764	274,670	21,057	9,037
1993.....	290,728	262,240	19,945	8,543
1994.....	275,025	248,430	18,431	8,164
1995.....	258,740	233,731	17,214	7,795
1996.....	244,014	221,059	15,466	7,489
1997.....	268,012	246,229	14,040	7,743
1998.....	263,668	242,390	13,472	7,806
1999.....	275,568	253,559	13,521	8,488
2000.....	341,503	315,148	15,625	10,730
2001.....	314,547	289,757	13,743	11,047
<b>Wives and husbands of disabled workers</b>				
1958 <sup>a</sup> .....	12,920	5,035	7,869	16
1959 <sup>b</sup> .....	54,299	21,301	32,844	154
1960.....	54,187	15,756	38,326	105
1965.....	69,183	13,813	55,230	140
1970.....	96,304	21,227	74,913	164
1975.....	148,741	31,942	116,624	175
1980.....	108,500	32,616	74,922	962
1981.....	95,575	30,360	64,333	882
1982.....	77,835	31,540	45,463	832
1983.....	80,079	35,369	43,820	890
1984.....	81,834	34,470	46,433	931
1985.....	83,511	34,101	48,522	888
1986.....	82,435	33,797	47,711	927
1987.....	77,316	31,652	43,881	1,783
1988.....	73,790	29,634	41,627	2,529
1989.....	69,113	27,750	39,212	2,151
1990.....	69,667	27,023	40,458	2,186
1991.....	72,754	26,747	43,543	2,464
1992.....	78,083	27,502	47,841	2,740
1993.....	74,605	26,276	45,602	2,727
1994.....	69,549	24,240	42,824	2,485
1995.....	63,097	22,833	37,972	2,292
1996.....	57,528	21,775	33,638	2,115
1997.....	50,818	23,329	25,779	1,710
1998.....	47,550	22,693	23,190	1,667
1999.....	46,164	22,557	21,949	1,658
2000.....	43,941	22,399	19,801	1,741
2001.....	43,412	21,979	19,535	1,898

a. September–November.

b. Includes December 1958.

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

NOTE: Benefits not necessarily payable at time of award.

CONTACT: Joseph Bondar (410) 965-0162 or Diane Wallace (410) 965-0165.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D3—Number and average monthly benefit for wives and husbands, by age and sex, 2001

Type of benefit and age	Total wives		Wives of—				Husbands	
			Retired workers		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 .....	227,800	398.00	192,100	426.10	35,700	246.60	9,900	245.00
Entitlement based on care of children .....	28,800	266.50	13,900	375.70	14,900	164.70	600	184.50
Under 35 .....	4,500	115.20	400	b	4,100	107.60	c	...
35-39 .....	3,700	207.10	1,200	322.60	2,500	151.70	c	...
40-44 .....	4,200	245.30	1,100	435.00	3,100	178.00	c	...
45-49 .....	6,400	291.60	3,600	365.80	2,800	196.20	c	...
50-54 .....	4,000	341.40	2,700	408.10	1,300	202.80	c	...
55-59 .....	3,800	343.90	2,900	382.00	900	221.20	c	...
60-61 .....	1,300	369.00	1,200	367.90	100	b	c	...
62-64 .....	900	380.80	800	388.60	100	b	c	...
Entitlement based on age .....	199,000	417.00	178,200	430.10	20,800	305.20	9,300	248.90
62-64 .....	147,700	398.40	129,300	414.20	18,400	287.70	2,000	245.80
62 .....	105,600	379.70	88,700	399.70	16,900	274.80	c	...
63 .....	22,000	447.40	21,300	447.40	700	447.20	c	...
64 .....	20,100	442.90	19,300	443.80	800	420.50	c	...
65-69 .....	44,400	471.10	42,500	472.80	1,900	432.80	4,600	270.10
65 .....	30,200	498.50	28,800	504.00	c	...	c	...
66 .....	6,300	450.00	6,000	450.00	c	...	c	...
67 .....	3,100	390.60	3,000	379.40	c	...	c	...
68 .....	2,300	417.70	2,200	401.30	c	...	c	...
69 .....	2,500	342.70	2,500	342.70	c	...	c	...
70-74 .....	4,800	484.70	4,500	478.70	300	b	2,000	216.50
75 or older .....	2,100	427.30	1,900	440.80	200	b	700	211.10
Wives (nondivorced) .....	208,200	397.20	174,400	427.40	33,800	241.30	...	...
Divorced wives .....	19,600	406.10	17,700	413.20	1,900	339.90	...	...
Husbands of retired workers .....	...	...	...	...	...	...	8,300	246.00
Husbands of disabled workers .....	...	...	...	...	...	...	1,600	240.20

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

b. Average benefit not shown for groups with fewer than 500 beneficiaries.

c. Base figure too small to meet statistical standards for reliability of derived figure.

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

NOTE: ... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Diane Wallace (410) 965-0165.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1957–2001

Year	Total	Children of—		
		Retired workers	Deceased workers	Disabled workers
<b>Total</b>				
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
<b>Children under age 18</b>				
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

Table 6.D4—Number of children, by type of benefit, selected years 1957–2001—Continued

Year	Total	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	<sup>a</sup>	<sup>a</sup>	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
<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	<sup>a</sup>	<sup>a</sup>	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

a. Data not available.

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

NOTE: . . . = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Diane Wallace (410) 965-0165.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D5—Number and average monthly benefit for children, by type of benefit and age, 2001

Type of benefit and age in month of award	Total number	Children of—					
		Retired workers		Deceased workers		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)
All children .....	756,300	112,700	401.40	292,000	609.70	351,600	231.00
Children under age 18 .....	520,300	68,500	374.80	184,000	596.60	267,800	203.70
Under 1 .....	19,900	700	436.00	4,900	574.20	14,300	162.10
1 .....	14,600	500	382.10	5,300	514.00	8,800	175.50
2 .....	14,600	500	98.70	6,100	550.20	8,000	187.30
3 .....	17,800	1,100	293.40	6,900	613.60	9,800	189.90
4 .....	19,100	900	303.30	6,500	564.30	11,700	148.90
5 .....	19,500	1,600	331.10	6,900	515.70	11,000	172.50
6 .....	18,400	2,500	401.30	6,000	540.80	9,900	185.20
7 .....	22,400	2,000	303.00	7,400	491.30	13,000	185.30
8 .....	27,600	3,400	386.40	8,800	544.40	15,400	183.60
9 .....	30,400	3,800	402.10	9,600	533.50	17,000	179.30
10 .....	32,800	3,100	327.50	12,200	563.40	17,500	167.90
11 .....	32,800	4,400	415.40	11,500	637.70	16,900	190.40
12 .....	36,800	3,600	319.00	14,400	604.50	18,800	205.10
13 .....	36,500	5,300	341.40	13,500	625.60	17,700	198.20
14 .....	42,500	8,700	350.20	14,000	619.80	19,800	223.70
15 .....	42,200	8,400	403.50	15,500	673.20	18,300	262.50
16 .....	49,000	9,500	404.00	18,400	627.40	21,100	263.90
17 .....	43,400	8,500	408.80	16,100	658.70	18,800	278.70
Disabled adult children .....	37,700	19,500	400.60	9,900	615.20	8,300	293.90
Under 20 .....	3,100	600	317.30	1,400	671.60	1,100	238.80
20–24 .....	9,300	2,700	359.30	2,500	541.40	4,100	243.90
25–29 .....	4,500	1,800	424.50	1,400	680.90	1,300	361.70
30–34 .....	5,600	3,300	446.10	1,400	768.30	900	372.30
35–39 .....	7,300	5,600	421.40	900	582.50	800	416.70
40 or older .....	7,900	5,500	373.80	2,300	540.80	100	<sup>b</sup>
Students, aged 18–19 .....	198,300	24,700	475.80	98,100	633.70	75,500	320.90
18 .....	197,100	24,400	478.20	97,700	635.10	75,000	322.10
19 .....	1,200	300	<sup>b</sup>	400	<sup>b</sup>	500	140.80

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

b. Average benefit not shown for groups with fewer than 500 beneficiaries.

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

CONTACT: Joseph Bondar (410) 965-0162 or Diane Wallace (410) 965-0165.

Table 6.D6—Number of mothers and fathers, by type of benefit, 1950–2001

Year	Total	Mothers	Fathers	Widowed			Surviving divorced mothers and fathers
				Total	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
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

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.

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

NOTE: ... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Diane Wallace (410) 965-0165.

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

**Table 6.D7—Number and average monthly benefit for widow(er)s, by age and sex, 2001**

Type of benefit, age, and sex	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 .....	313,400	896.10	16,300	558.90	26,400	539.60	40,500	643.00
Under 25 .....	...	...	...	...	...	...	2,000	437.10
25–29 .....	...	...	...	...	...	...	3,100	595.50
30–34 .....	...	...	...	...	...	...	5,500	583.10
35–39 .....	...	...	...	...	...	...	7,400	615.60
40–44 .....	...	...	...	...	...	...	9,100	649.20
45–49 .....	...	...	...	...	...	...	7,600	731.70
50–54 .....	...	...	...	...	10,400	543.40	4,500	680.50
55–59 .....	...	...	...	...	14,300	550.80	1,000	828.10
60–64 .....	135,400	832.50	11,200	587.60	1,700	421.50	300	<sup>b</sup>
60 .....	67,200	803.10	4,900	588.40	1,200	453.10	<sup>b</sup>	...
61 .....	23,300	852.00	2,700	542.40	300	<sup>c</sup>	<sup>b</sup>	...
62 .....	15,000	878.20	2,400	595.90	100	<sup>c</sup>	<sup>b</sup>	...
63 .....	13,100	848.80	400	<sup>c</sup>	100	<sup>c</sup>	<sup>b</sup>	...
64 .....	16,800	870.00	800	746.90	...	...	<sup>b</sup>	...
65–69 .....	56,400	863.10	1,400	650.90	...	...	...	...
65 .....	29,800	806.80	<sup>b</sup>	...	...	...	...	...
66 .....	8,500	905.50	<sup>b</sup>	...	...	...	...	...
67 .....	5,500	967.70	<sup>b</sup>	...	...	...	...	...
68 .....	4,600	857.70	<sup>b</sup>	...	...	...	...	...
69 .....	8,000	959.00	<sup>b</sup>	...	...	...	...	...
70–74 .....	34,500	931.00	700	542.40	...	...	...	...
70 .....	7,300	891.90	<sup>b</sup>	...	...	...	...	...
71 .....	6,300	873.20	<sup>b</sup>	...	...	...	...	...
72 .....	5,600	1,007.50	<sup>b</sup>	...	...	...	...	...
73 .....	7,100	973.00	<sup>b</sup>	...	...	...	...	...
74 .....	8,200	921.80	<sup>b</sup>	...	...	...	...	...
75–79 .....	40,100	957.60	1,100	448.40	...	...	...	...
75 .....	8,900	944.10	<sup>b</sup>	...	...	...	...	...
76 .....	7,800	886.40	<sup>b</sup>	...	...	...	...	...
77 .....	6,500	953.70	<sup>b</sup>	...	...	...	...	...
78 .....	8,800	996.50	<sup>b</sup>	...	...	...	...	...
79 .....	8,100	1,001.70	<sup>b</sup>	...	...	...	...	...
80 or older .....	47,000	1,040.90	1,900	391.80	...	...	...	...
Men .....	...	...	...	...	1,300	374.00	3,100	633.10
Women .....	...	...	...	...	25,100	548.20	37,400	643.90
Widow or mother .....	279,300	899.70	...	...	21,000	552.70	32,700	638.40
Surviving divorced wife or mother .....	34,100	866.70	...	...	4,100	524.90	4,700	681.70

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

b. Base figure too small to meet statistical standards for reliability of derived figure.

c. Average benefit not shown for groups with fewer than 500 beneficiaries.

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

NOTE: ... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Diane Wallace (410) 965-0165.



**Table 6.D8—Number of widow(er)s, by type of benefit, 1950–2001**

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

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

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

NOTE: ... = not applicable.

CONTACT: Joseph Bondar (410) 965-0162 or Diane Wallace (410) 965-0165.

**Table 6.D9—Number and average amount of lump-sum death payment awards, 1940–2001**

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
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	933,767	937,159	255.00
2001	926,625	930,712	255.00

a. January–November.  
b. Includes December 1958.  
c. Revised data.

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

CONTACT: Joseph Bondar (410) 965-0162 or Diane Wallace (410) 965-0165.

6.E OASDI: Benefits Withheld

Table 6.E1—Number and percentage distribution of retired workers with benefits withheld, by monthly benefit, reduction for early retirement, and sex, December 2001

Monthly benefit amount (dollars)	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
<b>All retired workers</b>						
Total .....	102,640	100.0	28,880	100.0	73,760	100.0
Less than 350.00 .....	17,940	17.5	6,990	24.2	10,950	14.8
350.00–399.90 .....	3,680	3.6	1,440	5.0	2,240	3.0
400.00–449.90 .....	4,490	4.4	1,070	3.7	3,420	4.6
450.00–499.90 .....	5,440	5.3	1,610	5.6	3,830	5.2
500.00–549.90 .....	5,710	5.6	1,850	6.4	3,860	5.2
550.00–599.90 .....	5,920	5.8	1,390	4.8	4,530	6.1
600.00–649.90 .....	5,000	4.9	1,330	4.6	3,670	5.0
650.00–699.90 .....	5,250	5.1	1,420	4.9	3,830	5.2
700.00–749.90 .....	4,500	4.4	1,190	4.1	3,310	4.5
750.00–799.90 .....	4,000	3.9	910	3.2	3,090	4.2
800.00–849.90 .....	3,580	3.5	1,060	3.7	2,520	3.4
850.00–899.90 .....	3,920	3.8	1,100	3.8	2,820	3.8
900.00–949.90 .....	3,380	3.3	770	2.7	2,610	3.5
950.00–999.90 .....	3,320	3.2	690	2.4	2,630	3.6
1,000.00–1,049.90 .....	2,950	2.9	650	2.3	2,300	3.1
1,050.00–1,099.90 .....	2,890	2.8	590	2.0	2,300	3.1
1,100.00–1,149.90 .....	2,700	2.6	390	1.4	2,310	3.1
1,150.00–1,199.90 .....	3,690	3.6	480	1.7	3,210	4.4
1,200.00–1,249.90 .....	3,100	3.0	440	1.5	2,660	3.6
1,200.00–1,299.90 .....	3,400	3.3	480	1.7	2,920	4.0
1,300.00 or more .....	7,780	7.6	3,030	10.5	4,750	6.4
<b>Men</b>						
Subtotal .....	65,310	100.0	20,420	100.0	44,890	100.0
Less than 350.00 .....	10,000	15.3	4,240	20.8	5,760	12.8
350.00–399.90 .....	2,540	3.9	1,110	5.4	1,430	3.2
400.00–449.90 .....	2,690	4.1	890	4.4	1,800	4.0
450.00–499.90 .....	3,100	4.7	1,240	6.1	1,860	4.1
500.00–549.90 .....	2,880	4.4	1,410	6.9	1,470	3.3
550.00–599.90 .....	2,520	3.9	1,020	5.0	1,500	3.3
600.00–649.90 .....	2,410	3.7	950	4.7	1,460	3.3
650.00–699.90 .....	2,640	4.0	1,050	5.1	1,590	3.5
700.00–749.90 .....	2,510	3.8	870	4.3	1,640	3.7
750.00–799.90 .....	2,330	3.6	590	2.9	1,740	3.9
800.00–849.90 .....	2,290	3.5	720	3.5	1,570	3.5
850.00–899.90 .....	2,490	3.8	680	3.3	1,810	4.0
900.00–949.90 .....	2,480	3.8	540	2.6	1,940	4.3
950.00–999.90 .....	2,230	3.4	460	2.3	1,770	3.9
1,000.00–1,049.90 .....	2,210	3.4	420	2.1	1,790	4.0
1,050.00–1,099.90 .....	2,260	3.5	410	2.0	1,850	4.1
1,100.00–1,149.90 .....	2,130	3.3	280	1.4	1,850	4.1
1,150.00–1,199.90 .....	3,110	4.8	360	1.8	2,750	6.1
1,200.00–1,249.90 .....	2,630	4.0	290	1.4	2,340	5.2
1,200.00–1,299.90 .....	3,020	4.6	360	1.8	2,660	5.9
1,300.00 or more .....	6,840	10.5	2,530	12.4	4,310	9.6
<b>Women</b>						
Subtotal .....	37,330	100.0	8,460	100.0	28,870	100.0
Less than 350.00 .....	7,940	21.3	2,750	32.5	5,190	18.0
350.00–399.90 .....	1,140	3.1	330	3.9	810	2.8
400.00–449.90 .....	1,800	4.8	180	2.1	1,620	5.6
450.00–499.90 .....	2,340	6.3	370	4.4	1,970	6.8
500.00–549.90 .....	2,830	7.6	440	5.2	2,390	8.3
550.00–599.90 .....	3,400	9.1	370	4.4	3,030	10.5
600.00–649.90 .....	2,590	6.9	380	4.5	2,210	7.7
650.00–699.90 .....	2,610	7.0	370	4.4	2,240	7.8
700.00–749.90 .....	1,990	5.3	320	3.8	1,670	5.8
750.00–799.90 .....	1,670	4.5	320	3.8	1,350	4.7
800.00–849.90 .....	1,290	3.5	340	4.0	950	3.3
850.00–899.90 .....	1,430	3.8	420	5.0	1,010	3.5
900.00–949.90 .....	900	2.4	230	2.7	670	2.3
950.00–999.90 .....	1,090	2.9	230	2.7	860	3.0
1,000.00–1,049.90 .....	740	2.0	230	2.7	510	1.8
1,050.00–1,099.90 .....	630	1.7	180	2.1	450	1.6
1,100.00–1,149.90 .....	570	1.5	110	1.3	460	1.6
1,150.00–1,199.90 .....	580	1.6	120	1.4	460	1.6
1,200.00–1,249.90 .....	470	1.3	150	1.8	320	1.1
1,200.00–1,299.90 .....	380	1.0	120	1.4	260	0.9
1,300.00 or more .....	940	2.5	500	5.9	440	1.5

SOURCE: Social Security Administration, Master Beneficiary Record, 10 percent sample.

CONTACT: Dana Nichele Mercer (410) 966-6637 or Robert L. Hackendorf (410) 965-5536.

**Table 6.E4—Number of beneficiaries, with benefits withheld, by reason for withholding payment, type of benefit, and age, December 2001**

Reason payment withheld	Total	Retired workers			Disabled workers	Wives and husbands				Children	Widowed mothers and fathers	Widow(er)s	Par-ents	Special age-72 beneficiaries
		Total	Men	Women		Total	Wives		Hus-bands					
							Without children <sup>a</sup>	With chil-dren <sup>b</sup>						
Total .....	1,633,120	102,382	64,352	38,030	103,963	280,876	146,400	64,087	70,389	465,178	66,713	604,069	541	9,398
Earnings of—														
Retired workers .....	42,073	39,248	22,990	16,258	...	1,767	1,496	186	85	1,058	...	...	...	...
Other beneficiaries .....	94,715	...	...	...	...	42,289	779	39,209	2,301	235	42,822	9,369	...	...
Entitled child not in care of beneficiary .....	29,693	...	...	...	...	14,025	126	12,753	1,146	...	15,668	...	...	...
Payee not determined .....	9,086	796	411	385	1,688	52	35	9	8	6,263	13	271	...	...
Recoupment of overpayment for reasons other than earnings .....	28,294	7,223	3,737	3,486	5,040	2,136	1,049	1,039	48	9,642	1,691	2,560	...	...
Address unknown .....	47,147	18,884	11,215	7,669	8,444	1,570	975	455	140	10,873	271	6,673	39	393
Determination of continuing disability pending .....	9,307	...	...	...	5,927	241	5	236	...	3,126	...	13	...	...
Workers' compensation offset .....	7,647	...	...	...	1,927	547	35	512	...	5,173	...	...	...	...
Government pension offset .....	264,769	...	...	...	...	176,423	113,024	...	63,399	...	87	84,812	...	3,447
Receipt of public assistance .....	3,798	...	...	...	...	...	...	...	...	...	...	...	...	3,798
Technical entitlement .....	869,440	...	...	...	...	25,107	17,331	6,002	1,774	355,110	1,479	487,593	107	44
Other reasons .....	227,151	36,231	25,999	10,232	80,937	16,719	11,545	3,686	1,488	73,698	4,682	12,778	391	1,715

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.

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

NOTE: ... = not applicable.

CONTACT: Dana Nichele Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

**Table 6.E5—Number of wives, husbands, and children, with benefits withheld, by reason for withholding payment and type of benefit, December 2001**

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 .....	220,002	60,874	22,304	54,741	202,412	83,887	56,972	17,542	4,964	14,445	7,911
Earnings of—											
Retired workers .....	1,767	...	865	...	...	164	...	...	29	...	...
Other beneficiaries .....	7,564	34,725	33	53	70	18	15	...	a	24	a
Entitled child not in care of beneficiary .....	2,452	11,573	...	...	...	...	...	...	...	...	...
Payee not determined .....	42	10	292	2,711	2,188	163	810	81	a	g	a
Recoupment of overpayment for reasons other than earnings .....	1,187	949	401	2,394	6,268	95	246	96	10	65	67
Address unknown .....	1,127	443	502	2,635	5,417	314	1,450	244	32	166	113
Determination of continuing disability pending .....	...	241	...	...	2,461	103	398	145	...	...	19
Workers' compensation offset .....	...	547	...	...	5,029	...	...	61	...	...	83
Government pension offset .....	174,840	1,583	...	...	...	...	...	...	...	...	...
Technical entitlement .....	17,627	7,480	16,280	33,781	145,192	80,483	45,610	13,347	4,257	10,957	5,203
Other reasons .....	13,396	3,323	3,931	13,167	35,787	2,547	8,443	3,568	629	3,224	2,403

a. Not shown to avoid disclosure of information regarding particular individuals.

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

NOTE: ... = not applicable.

CONTACT: Dana Nichele Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

6.F OASDI: Benefits Terminated

Table 6.F1—Number of benefits terminated, by type, 1940–2001

Year	Total	Retired workers	Disabled workers	Wives and husbands	Children				Widowed mothers and fathers	Widow(er)s	Parents	Special age-72
					Total	Under age 18	Disabled adult children	Students				
Total.....	130,612,609	45,501,146	13,831,788	16,724,472	36,957,340	23,244,412	683,786	13,029,142	4,426,278	11,832,018	106,987	1,232,580
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	158,302	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
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

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

NOTE: . . . = not applicable.

CONTACT: Dana Nichele Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

**Table 6.F2—Number, by reason for termination and type of benefit, 2001**

Reason for termination	Total	Retired workers	Disabled workers	Wives and husbands	Children	Widow(er)s and parents	Widowed mothers and fathers	Special age-72 beneficiaries
Total .....	3,440,679	1,460,763	459,073	304,413	775,873	390,604	49,838	115
Death of beneficiary .....	2,023,649	1,410,704	175,178	82,633	20,231	333,730	1,058	115
Termination resulting from death of worker .....	178,808	...	...	149,207	29,601	...	...	...
Marriage, remarriage, or divorce of beneficiary .....	34,324	...	...	4,480	16,185	4,253	9,406	...
Attainment of age—								
18 by children .....	403,267	...	...	...	403,267	...	...	...
19 by student .....	59,814	...	...	...	59,814	...	...	...
65 by disabled worker .....	244,126	...	214,282	18,626	11,218	...	...	...
65 by disabled widow(er) .....	13,118	...	...	...	...	13,118	...	...
Termination due to attainment of age 16 of child .....	60,965	...	...	26,080	...	...	34,885	...
Entitlement to an equal or larger Social Security benefit .....	88,335	36,343	4,045	6,825	3,937	34,108	3,077	...
Does not meet medical standards <sup>a</sup>								
Disabled worker or widow(er) .....	103,764	...	58,597	2,908	42,018	241	...	...
Disabled adult child .....	3,826	...	...	...	3,826	...	...	...
Student no longer attending school .....	164,044	...	...	...	164,044	...	...	...
Other .....	62,639	13,716	6,971	13,654	21,732	5,154	1,412	...

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.

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

NOTE: . . . = not applicable.

CONTACT: Dana Nichele Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

**Table 6.F3—Number of wives, husbands, and children, by reason for termination and type of benefit, 2001**

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 .....	252,196	52,217	49,668	199,396	266,236	5,808	17,501	9,679	27,769	117,162	82,654
Death of beneficiary .....	81,187	1,446	183	2,081	1,058	2,944	13,182	533	27	154	69
Termination resulting from death of worker .....	143,313	5,894	...	...	26,695	...	...	1,715	...	...	1,191
Marriage, remarriage, or divorce of beneficiary .....	1,710	2,770	1,053	3,834	8,463	370	1,159	531	103	323	349
Attainment of age—											
18 by children .....	...	...	45,528	189,391	168,348	...	...	...	...	...	...
19 by student .....	...	...	...	...	...	...	...	...	6,923	32,504	20,387
65 by disabled worker .....	...	18,626	...	...	6,866	...	...	3,963	...	...	389
Termination due to attainment of age 16 of child .....	9,213	16,867	...	...	...	...	...	...	...	...	...
Entitlement to an equal or larger Social Security benefit .....	5,532	1,293	1,516	258	880	585	293	292	63	11	39
Does not meet medical standards <sup>a</sup>											
Disabled worker .....	...	2,908	...	...	39,820	...	...	1,812	...	...	386
Disabled adult child .....	...	...	...	...	...	917	2,720	189	...	...	...
Student no longer attending school .....	...	...	...	...	...	...	...	...	20,578	84,001	59,465
Other .....	11,241	2,413	1,388	3,832	14,106	992	147	644	75	169	379

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.

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

NOTE: . . . = not applicable.

CONTACT: Dana Nichele Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

## 7.A SSI: Summary

**Table 7.A1—Number of persons receiving federally administered payments, total amount, and average monthly amount, by source of payment, eligibility category, and age, December 2001**

Source of payment	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older <sup>a</sup>
<b>Number of persons</b>							
Total .....	6,688,489	1,264,463	78,255	5,345,771	881,836	3,811,494	1,995,159
Federal payment only .....	4,168,484	643,511	42,547	3,482,426	631,901	2,458,058	1,078,525
Federal payment and state supplementation .....	2,241,654	521,314	30,264	1,690,076	247,551	1,218,480	775,623
State supplementation only .....	278,351	99,638	5,444	173,269	2,384	134,956	141,011
Total with—							
Federal payment .....	6,410,138	1,164,825	72,811	5,172,502	879,452	3,676,538	1,854,148
State supplementation .....	2,520,005	620,952	35,708	1,863,345	249,935	1,353,436	916,634
<b>Amount of payments<sup>b</sup> (thousands of dollars)</b>							
Total .....	2,839,520	400,762	34,425	2,404,333	456,196	1,745,532	637,793
Federal payments .....	2,537,423	318,398	28,043	2,190,982	441,738	1,578,858	516,827
State supplementation .....	302,098	82,364	6,383	213,351	14,458	166,674	120,966
<b>Average monthly amount<sup>c</sup> (dollars)</b>							
Total .....	393.96	314.22	428.04	412.46	476.09	415.97	316.55
Federal payments .....	366.31	271.13	374.72	387.80	462.23	389.41	276.17
State supplementation .....	113.65	130.89	173.98	106.72	53.06	113.55	130.12

a. Includes approximately 18,300 blind and 712,400 disabled persons aged 65 or older.

b. Includes retroactive payments.

c. Excludes retroactive payments.

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

CONTACT: Art Kahn (410) 965-0186.

**Table 7.A2—Number of individuals and couples receiving federally administered payments, total amount, and average monthly amount, by source of payment and eligibility category, December 2001**

Source of payment	Aged		Blind		Disabled		Blind and disabled under age 18
	Individual	Couple	Individual	Couple	Individual	Couple	
<b>Number</b>							
Total .....	1,008,608	132,590	66,600	2,987	4,180,867	139,712	881,836
Federal payment only .....	543,603	51,154	36,550	1,289	2,690,761	80,321	631,901
Federal payment and state supplementation .....	390,099	69,110	25,142	1,437	1,333,929	52,231	247,551
State supplementation only .....	74,906	12,326	4,908	261	156,177	7,160	2,384
Total with—							
Federal payment .....	933,702	120,264	61,692	2,726	4,024,690	132,552	879,452
State supplementation .....	465,005	81,436	30,050	1,698	1,490,106	59,391	249,935
<b>Amount of payments<sup>a</sup> (thousands of dollars)</b>							
Total .....	312,337	93,254	28,885	2,405	1,853,394	93,048	456,196
Federal payments .....	255,495	66,560	23,683	1,583	1,673,446	74,917	441,738
State supplementation .....	56,842	26,694	5,202	822	179,948	18,131	14,458
<b>Average monthly amount<sup>b</sup> (dollars)</b>							
Total .....	307.03	695.18	422.70	783.09	405.58	634.35	476.09
Federal payments .....	271.46	547.66	374.09	570.44	379.69	538.87	462.23
State supplementation .....	120.47	323.53	168.90	465.12	112.36	291.34	53.06

a. Includes retroactive payments.

b. Excludes retroactive payments.

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

CONTACT: Art Kahn (410) 965-0186.

Table 7.A3—Number of persons receiving payments, by source of payment and eligibility category, January 1974 and December 1975–2001, selected years

Month and year	Total	Federally administered	Federal SSI	State supplementation				
				Total	Federally administered		State administered	
					Total, federally administered supplementation	Federal SSI only	Total, state administered supplementation	State administered only
<b>All persons</b>								
January 1974 .....	3,248,949	3,215,632	2,955,959	1,838,602	1,480,309	259,673	358,293	33,317
December								
1975 .....	4,359,625	4,314,275	3,893,419	1,987,409	1,684,018	420,856	303,391	45,350
1980 .....	4,194,100	4,142,017	3,682,411	1,934,239	1,684,765	459,606	249,474	52,083
1985 .....	4,200,177	4,138,021	3,799,092	1,915,503	1,660,847	338,929	254,656	62,156
1990 .....	4,888,180	4,817,127	4,412,131	2,343,803	2,058,273	404,996	285,530	71,053
1995 .....	6,575,753	6,514,134	6,194,493	2,817,408	2,517,805	319,641	299,603	61,619
1996 .....	6,676,729	6,613,718	6,325,531	2,731,681	2,421,470	288,187	310,211	63,011
1997 .....	6,564,613	6,494,985	6,211,867	3,029,449	2,372,479	283,118	656,970	69,628
1998 .....	6,649,465	6,566,069	6,289,070	3,072,392	2,411,707	276,999	660,685	83,396
1999 .....	6,641,256	6,556,634	6,274,707	3,116,309	2,441,482	281,927	674,827	84,622
2000 .....	6,685,169	6,601,686	6,319,907	3,163,504	2,480,637	281,779	682,867	83,483
2001 .....	6,775,548	6,688,489	6,410,138	3,209,168	2,520,005	278,351	689,163	87,059
<b>Aged</b>								
January 1974 .....	1,889,898	1,865,109	1,690,496	1,022,244	770,318	174,613	251,926	24,789
December								
1975 .....	2,333,685	2,307,105	2,024,765	1,028,596	843,917	282,340	184,679	26,580
1980 .....	1,838,381	1,807,776	1,533,366	837,318	702,763	274,410	134,555	30,605
1985 .....	1,529,674	1,504,469	1,322,292	698,634	583,913	182,177	114,721	25,205
1990 .....	1,484,160	1,454,041	1,256,623	765,420	649,530	197,418	115,890	30,119
1995 .....	1,479,415	1,446,122	1,314,720	777,841	663,390	131,402	114,451	33,293
1996 .....	1,446,321	1,412,632	1,296,462	752,760	638,173	116,170	114,587	33,689
1997 .....	1,395,845	1,362,350	1,251,374	750,168	619,516	110,976	130,652	33,495
1998 .....	1,369,206	1,331,782	1,225,578	756,209	617,984	106,204	138,225	37,424
1999 .....	1,346,771	1,308,062	1,203,056	759,681	620,261	105,006	139,420	38,709
2000 .....	1,327,567	1,289,339	1,186,309	767,312	622,668	103,030	144,644	38,228
2001 .....	1,304,273	1,264,463	1,164,825	764,606	620,952	99,638	143,654	39,810
<b>Blind</b>								
January 1974 .....	73,850	72,390	55,680	45,828	37,326	16,710	8,502	1,460
December								
1975 .....	75,315	74,489	68,375	36,309	31,376	6,114	4,933	826
1980 .....	79,139	78,401	68,945	39,863	36,214	9,456	3,649	738
1985 .....	82,622	82,220	73,817	41,323	38,291	8,403	3,032	402
1990 .....	84,109	83,686	74,781	43,376	40,334	8,905	3,042	423
1995 .....	84,273	83,545	77,064	42,272	38,695	6,481	3,577	728
1996 .....	82,815	82,137	76,180	40,173	36,759	5,957	3,414	678
1997 .....	81,449	80,778	74,926	40,593	36,050	5,852	4,543	671
1998 .....	81,029	80,243	74,623	40,828	36,193	5,620	4,635	786
1999 .....	80,097	79,291	73,579	40,765	36,118	5,712	4,647	806
2000 .....	79,295	78,511	72,931	40,585	35,940	5,580	4,645	784
2001 .....	79,058	78,255	72,811	40,272	35,708	5,444	4,564	803
<b>Disabled</b>								
January 1974 .....	1,285,201	1,278,122	1,209,783	769,501	672,575	68,350	96,926	7,068
December								
1975 .....	1,950,625	1,932,681	1,800,279	922,229	808,725	132,402	113,504	17,944
1980 .....	2,276,130	2,255,840	2,080,100	1,050,155	945,788	175,740	104,367	20,290
1985 .....	2,586,741	2,551,332	2,402,983	1,167,326	1,038,643	148,349	128,683	35,409
1990 .....	3,319,911	3,279,400	3,080,727	1,535,007	1,368,409	198,673	166,598	40,511
1995 .....	5,010,326	4,984,467	4,802,709	1,995,262	1,815,720	181,758	179,542	25,859
1996 .....	5,145,850	5,118,949	4,952,889	1,933,493	1,746,538	166,060	186,955	26,901
1997 .....	5,078,995	5,051,857	4,885,567	1,998,187	1,716,913	166,290	281,274	27,138
1998 .....	5,190,815	5,154,044	4,988,869	2,067,530	1,757,530	165,175	310,000	36,771
1999 .....	5,205,997	5,169,281	4,998,072	2,107,982	1,785,103	171,209	322,879	36,716
2000 .....	5,270,126	5,233,836	5,060,667	2,147,945	1,822,029	173,169	325,916	36,290
2001 .....	5,384,121	5,345,771	5,172,502	2,196,639	1,863,345	173,269	333,294	38,350

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

CONTACT: Art Kahn (410) 965-0186.

7.A SSI: Summary

Table 7.A4—Total annual amount of payments, by source of payment and eligibility category, selected years 1974–2001 (in thousands of dollars)

Year	Total <sup>a</sup>	Federal SSI	State supplementation	
			Federally administered	State administered <sup>a</sup>
<b>All persons</b>				
1974.....	5,245,719	3,833,161	1,263,652	148,906
1975.....	5,878,224	4,313,538	1,402,534	162,152
1980.....	7,940,734	5,866,354	1,848,286	226,094
1985.....	11,060,476	8,777,341	1,972,597	310,538
1990.....	16,598,680	12,893,805	3,239,154	465,721
1995.....	27,627,658	23,919,430	3,117,850	590,378
1996.....	28,791,924	25,264,878	2,987,596	539,450
1997.....	29,052,089	25,457,387	2,913,181	681,521
1998.....	30,216,345	26,404,793	3,003,415	808,137
1999.....	30,959,475	26,805,156	3,300,976	853,343
2000.....	31,564,439	27,290,248	3,381,451	892,740
2001.....	33,060,819	28,705,503	3,460,353	894,963
<b>Aged</b>				
1974.....	2,503,407	1,782,742	631,292	89,373
1975.....	2,604,792	1,842,980	673,535	88,277
1980.....	2,734,270	1,860,194	756,829	117,247
1985.....	3,034,596	2,202,557	694,114	137,925
1990.....	3,736,104	2,521,382	1,038,006	176,716
1995.....	4,467,146	3,374,772	864,450	227,924
1996.....	4,507,202	3,449,407	833,091	224,705
1997.....	4,531,973	3,479,948	823,581	228,444
1998.....	4,424,877	3,327,856	838,375	258,646
1999.....	4,724,748	3,514,689	921,332	271,003
2000.....	4,811,048	3,595,384	942,530	283,073
2001.....	4,958,644	3,708,527	955,549	294,568
<b>Blind</b>				
1974.....	130,195	91,308	34,483	4,404
1975.....	130,936	92,427	34,813	3,696
1980.....	190,075	131,506	54,321	4,248
1985.....	264,162	195,183	64,657	4,322
1990.....	334,120	238,415	90,534	5,171
1995.....	375,512	298,238	69,203	8,071
1996.....	371,869	298,897	65,894	7,077
1997.....	374,857	302,656	65,189	7,012
1998.....	366,452	291,050	67,137	8,265
1999.....	391,181	308,556	73,028	8,557
2000.....	394,484	312,144	73,688	8,636
2001.....	407,371	323,895	74,729	8,747
<b>Disabled</b>				
1974.....	2,601,936	1,959,112	597,876	44,948
1975.....	3,142,476	2,378,131	694,186	70,159
1980.....	5,013,948	3,874,655	1,037,137	102,156
1985.....	7,754,588	6,379,601	1,213,826	161,161
1990.....	12,520,568	10,134,007	2,110,615	275,946
1995.....	22,778,547	20,246,415	2,184,197	347,935
1996.....	23,905,578	21,516,579	2,088,610	300,389
1997.....	24,006,254	21,685,421	2,024,410	296,423
1998.....	25,304,721	22,785,879	2,097,903	420,939
1999.....	25,722,400	22,598,270	2,306,616	452,640
2000.....	26,189,350	23,399,442	2,365,233	479,635
2001.....	27,611,303	24,695,630	2,430,077	485,596

a. Includes data not distributed by category.

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

CONTACT: Stella M. Coleman (410) 965-0157 or Alfreda Brooks (410) 965-9849.



**Table 7.A5—Average monthly amount, by source of payment and eligibility category, December 1975–2001, selected years (in dollars)**

Year	Total	Federally administered	Federal SSI	State supplementation			
				Total	Federally administered	State administered <sup>a</sup>	
<b>Total</b>							
1975.....	108.46	106.33	90.59	57.55	61.72	38.69	
1980.....	164.66	161.92	138.14	93.44	95.17	81.57	
1985.....	220.70	218.09	193.77	99.37	99.39	99.21	
1990.....	279.91	276.45	241.52	128.24	127.83	131.32	
1995.....	338.73	335.45	312.83	103.23	98.66	142.59	
1996.....	347.62	343.88	322.11	104.82	98.80	152.91	
1997.....	356.96	350.58	327.53	101.46	101.92	99.82	
1998.....	365.28	359.45	336.06	102.47	102.33	102.97	
1999.....	374.96	368.53	341.86	110.44	110.92	108.70	
2000.....	385.52	378.82	351.48	112.16	112.50	110.95	
2001.....	400.06	393.96	366.31	112.65	113.65	109.03	
<b>Aged</b>							
1975.....	88.91	86.72	73.77	50.61	57.38	28.68	
1980.....	130.28	126.66	105.69	92.64	95.60	77.55	
1985.....	168.16	164.01	141.41	101.25	103.58	89.91	
1990.....	213.40	208.26	170.74	133.62	136.31	118.82	
1995.....	256.66	250.27	220.15	116.26	109.62	153.94	
1996.....	267.69	260.27	228.25	120.53	111.74	168.66	
1997.....	275.83	268.46	235.45	120.11	114.35	147.09	
1998.....	285.95	277.45	243.28	123.29	115.29	158.80	
1999.....	298.23	289.19	249.36	133.51	125.90	167.17	
2000.....	309.40	299.69	258.12	135.88	128.46	167.49	
2001.....	322.69	314.22	271.13	137.06	130.89	163.52	
<b>Blind</b>							
1975.....	140.20	137.58	112.69	68.81	78.57	35.40	
1980.....	195.60	192.51	163.36	109.79	111.41	97.56	
1985.....	263.86	260.25	224.31	121.76	122.15	118.07	
1990.....	323.31	319.03	267.34	165.57	167.29	148.26	
1995.....	360.61	355.24	317.06	143.65	138.31	188.15	
1996.....	366.59	362.07	326.16	141.92	138.18	171.65	
1997.....	385.42	381.65	337.79	149.55	152.83	123.70	
1998.....	395.20	390.19	344.77	154.21	154.33	153.18	
1999.....	407.19	401.99	350.72	166.66	167.64	159.15	
2000.....	418.14	413.22	360.51	168.91	171.01	154.79	
2001.....	432.89	428.04	374.72	172.27	173.98	159.85	
<b>Disabled</b>							
1975.....	130.59	128.49	108.55	65.63	65.68	65.20	
1980.....	190.96	188.70	160.78	93.57	94.38	86.19	
1985.....	248.36	246.50	219.61	97.73	96.63	107.06	
1990.....	305.82	302.78	266.84	125.01	123.36	139.70	
1995.....	360.99	358.18	336.39	97.76	94.26	134.44	
1996.....	368.65	365.49	345.36	98.32	93.63	142.92	
1997.....	375.45	372.52	351.28	95.09	96.29	87.88	
1998.....	384.67	380.46	359.07	99.32	96.63	114.30	
1999.....	393.18	388.29	364.24	107.06	104.52	120.92	
2000.....	402.93	397.92	373.41	108.66	105.86	124.09	
2001.....	417.16	412.46	387.80	109.10	106.72	122.29	

a. Includes data not distributed by category.

SOURCE: Social Security Administration, Supplemental Security Record, 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, 1974–2001**

Year	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older
All awards .....	23,041,300	7,041,170	283,770	15,575,910	2,653,770	13,417,740	6,969,790
Awards based on state conversions <sup>a</sup> .....	3,150,690	1,760,970	77,810	1,311,910	3,160	1,303,490	1,844,040
Federal applications							
1974 .....	1,337,630	770,880	8,700	558,050	66,970	497,910	772,750
1975 .....	927,770	350,130	9,090	568,550	62,900	513,590	351,280
1976 .....	674,560	222,900	7,040	444,620	45,060	408,010	221,490
1977 .....	643,480	214,220	8,250	280,560	50,960	381,620	210,900
1978 .....	566,110	193,670	7,910	364,530	47,060	329,170	189,880
1979 .....	517,010	177,140	7,870	332,000	45,810	299,330	171,870
1980 .....	526,780	185,340	8,850	332,590	46,240	299,950	180,590
1981 .....	411,500	122,690	8,250	280,560	39,020	254,880	117,600
1982 .....	342,650	103,350	6,810	232,490	35,680	206,550	100,420
1983 .....	458,590	152,800	7,760	298,030	42,110	267,620	148,860
1984 .....	586,700	217,210	8,950	360,540	45,750	331,340	209,610
1985 .....	527,790	155,880	8,290	363,620	46,580	335,340	145,870
1986 .....	603,560	159,740	7,780	436,040	51,060	404,470	148,030
1987 .....	589,460	166,250	8,420	414,790	48,490	386,970	154,000
1988 .....	578,340	168,570	7,150	402,620	47,570	374,290	156,480
1989 .....	629,500	188,040	7,040	434,420	51,530	401,060	176,910
1990 .....	718,300	193,380	7,980	516,940	76,120	459,800	182,380
1991 .....	822,880	189,860	7,570	625,450	126,190	518,610	178,080
1992 .....	1,049,250	190,170	8,260	850,820	221,120	650,260	177,870
1993 .....	1,054,190	185,770	7,040	861,380	236,250	644,810	173,130
1994 .....	944,780	158,400	6,600	779,780	203,220	595,620	145,940
1995 .....	893,440	142,140	5,950	745,350	177,620	586,120	129,700
1996 .....	798,000	124,020	5,540	668,440	144,300	535,270	118,430
1997 .....	673,390	93,810	4,870	574,710	116,350	461,580	95,460
1998 .....	739,680	108,920	6,320	624,440	135,650	489,950	114,080
1999 .....	757,580	120,630	5,840	631,110	139,480	494,180	123,920
2000 .....	747,170	116,470	5,830	624,870	144,560	483,170	119,440
2001 .....	770,520	107,820	6,000	656,700	156,970	502,770	110,780

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.

SOURCE: Social Security Administration, Supplemental Security Record, 10 percent sample.

NOTE: Represents period in which first payment was made, not date of entitlement to payments.

CONTACT: Clark Pickett (410) 965-9016.

**Table 7.A9—Number of persons receiving federally administered payments, by eligibility category and age, December 1974–2001**

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

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

CONTACT: Art Kahn (410) 965-0186.

7.B SSI: State Data

Table 7.B1—Number of persons receiving federally administered payments and total annual amount, by eligibility category and state or other area, 2001

State or area	Number in December				Amount of payments for calendar year (thousands of dollars)			
	Total	Aged	Blind <sup>a</sup>	Disabled <sup>b</sup>	Total	Aged	Blind	Disabled
All areas <sup>c</sup> .....	6,688,489	1,264,463	78,255	5,345,771	32,165,843	4,664,076	398,624	27,103,152
Alabama .....	161,521	24,500	1,115	135,906	698,244	50,446	4,522	643,276
Alaska .....	9,123	1,483	124	7,516	40,434	4,172	526	35,737
Arizona .....	84,796	13,186	967	70,643	382,249	41,061	4,613	336,575
Arkansas .....	85,088	13,075	954	71,059	341,104	23,759	3,959	313,386
California .....	1,106,294	335,458	21,896	748,940	6,684,637	1,785,000	144,632	4,755,004
Colorado .....	53,466	8,772	551	44,143	236,648	27,961	2,512	206,175
Connecticut .....	49,586	6,973	510	42,103	227,245	24,629	2,356	200,259
Delaware .....	12,197	1,323	122	10,752	53,110	3,475	512	49,123
District of Columbia .....	19,973	2,356	195	17,422	97,542	7,022	915	89,604
Florida .....	386,334	93,118	3,198	290,018	1,724,213	321,572	13,984	1,388,656
Georgia .....	198,063	32,433	2,233	163,397	826,310	73,750	9,724	742,836
Hawaii .....	21,303	6,812	180	14,311	106,664	28,142	898	77,624
Idaho .....	18,840	1,843	204	16,793	80,917	4,118	832	75,967
Illinois .....	249,004	31,980	2,405	214,619	1,207,560	118,030	11,164	1,078,366
Indiana .....	89,118	6,889	1,060	81,169	399,185	16,591	4,442	378,152
Iowa .....	40,716	4,283	798	35,635	167,326	9,525	3,174	154,627
Kansas .....	36,600	3,663	370	32,567	157,986	9,508	1,703	146,774
Kentucky .....	175,925	17,700	1,409	156,816	778,881	37,733	6,092	735,056
Louisiana .....	166,181	23,191	1,865	141,125	741,283	52,366	8,127	680,790
Maine .....	30,138	3,154	231	26,753	122,659	5,594	972	116,093
Maryland .....	89,180	15,601	742	72,837	419,779	52,414	3,318	364,047
Massachusetts .....	166,874	45,470	4,160	117,244	833,337	178,250	22,317	632,770
Michigan .....	210,492	18,768	1,861	189,863	1,021,227	58,667	8,632	953,928
Minnesota .....	65,538	10,081	728	54,729	288,792	32,270	3,228	253,293
Mississippi .....	128,449	20,739	1,212	106,498	529,598	41,665	4,921	483,012
Missouri .....	113,258	12,007	984	100,267	495,343	27,930	4,174	463,240
Montana .....	14,206	1,304	130	12,772	60,977	2,736	554	57,687
Nebraska .....	21,471	2,307	246	18,918	90,012	5,449	1,020	83,543
Nevada .....	27,161	7,263	680	19,218	120,453	24,184	3,489	92,779
New Hampshire .....	11,942	944	126	10,872	52,167	2,395	571	49,200
New Jersey .....	147,747	34,101	1,067	112,579	700,334	130,530	4,903	564,901
New Mexico .....	47,579	8,814	554	38,211	205,259	23,264	2,519	179,476
New York .....	622,764	137,622	3,271	481,871	3,319,861	588,707	16,163	2,714,991
North Carolina .....	191,630	31,916	2,068	157,646	769,394	66,985	8,474	693,936
North Dakota .....	8,129	1,277	86	6,766	31,104	2,862	348	27,894
Ohio .....	241,763	16,929	2,193	222,641	1,161,754	48,828	10,007	1,102,919
Oklahoma .....	72,756	10,072	844	61,840	315,739	22,797	3,773	289,170
Oregon .....	54,099	7,440	635	46,024	245,903	23,004	2,855	220,044
Pennsylvania .....	294,467	35,239	2,441	256,787	1,464,383	111,364	11,576	1,341,443
Rhode Island .....	28,623	4,511	216	23,896	141,034	15,597	989	124,448
South Carolina .....	106,881	15,949	1,574	89,358	445,746	34,064	6,647	405,035
South Dakota .....	12,698	1,921	100	10,677	51,007	4,015	439	46,553
Tennessee .....	162,920	21,487	1,677	139,756	688,892	44,553	7,333	637,005
Texas .....	418,235	113,587	5,868	298,780	1,682,894	304,581	25,161	1,353,152
Utah .....	20,545	2,096	255	18,194	92,732	7,363	1,205	84,164
Vermont .....	12,554	1,464	116	10,974	53,760	3,191	471	50,098
Virginia .....	132,808	23,834	1,439	107,535	555,064	67,290	6,084	481,690
Washington .....	104,700	14,303	975	89,422	521,401	58,397	4,643	458,361
West Virginia .....	72,953	5,232	595	67,126	335,311	10,827	2,660	321,824
Wisconsin .....	85,333	9,310	957	75,066	370,606	23,817	4,199	342,590
Wyoming .....	5,790	525	52	5,213	24,546	997	207	23,341
Outlying area								
Northern Mariana Islands .....	677	158	16	503	3,252	635	85	2,531

- a. Includes approximately 18,300 blind persons aged 65 or older.
- b. Includes approximately 712,400 disabled persons aged 65 or older.
- c. Includes data not distributed by state.

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

CONTACT: Art Kahn (410) 965-0186 or Stella M. Coleman (410) 965-0157.

**Table 7.B2—Number of persons receiving state-administered supplementation and total amount of payments, by eligibility category and state, 2001 (in thousands of dollars)**

State	Number in December				Amount of payments for calendar year (thousands of dollars)			
	Total <sup>a</sup>	Aged	Blind	Disabled	Total <sup>a</sup>	Aged	Blind	Disabled
All relevant states .....	689,163	143,654	4,564	333,294	894,963	294,568	8,747	485,596
Alabama .....	672	265	10	397	503	212	7	284
Alaska .....	14,560	4,714	87	9,759	52,424	16,662	353	35,409
Arizona .....	457	...	...	457	374	...	...	374
Colorado .....	32,389	24,053	17	8,319	78,667	56,640	45	21,982
Connecticut .....	20,917	6,022	130	14,765	84,267	29,299	541	54,427
Florida .....	15,279	6,918	8	8,353	27,962	12,165	17	15,780
Idaho .....	11,061	2,127	27	8,907	8,940	7,628	18	1,294
Illinois .....	34,686	7,675	154	26,857	29,655	7,828	173	21,654
Indiana .....	1,140	525	6	609	3,780	1,397	14	2,369
Iowa .....	4,416	1,176	...	3,240	16,599	b	b	b
Kentucky .....	4,742	1,987	35	2,720	17,802	7,484	79	10,239
Louisiana .....	5,090	b	b	b	482	b	b	b
Maine .....	38,649	8,402	129	30,118	9,027	3,073	54	5,900
Maryland .....	3,006	b	b	b	8,080	b	b	b
Michigan .....	195,701	b	b	b	78,467	b	b	b
Minnesota .....	36,392	8,239	172	29,981	80,438	9,506	249	70,683
Missouri <sup>c</sup> .....	8,963	3,123	865	4,975	25,712	8,993	3,309	13,410
Nebraska .....	5,574	1,327	47	4,200	6,307	1,395	19	4,893
New Hampshire .....	16,784	8,174	339	8,271	11,597	1,828	761	9,008
New Mexico .....	197	b	b	b	233	b	b	b
North Carolina .....	23,691	13,099	107	10,485	135,725	71,040	839	63,846
North Dakota <sup>c</sup> .....	355	151	1	203	1,930	830	15	1,085
Oklahoma .....	72,089	20,746	500	50,843	37,400	9,743	291	27,366
Oregon .....	16,972	4,710	706	11,556	20,276	17,811	387	2,078
South Carolina .....	3,483	1,799	16	1,668	13,108	6,597	63	6,448
South Dakota .....	3,647	b	b	b	2,191	b	b	b
Virginia .....	6,813	3,115	16	3,682	20,677	8,874	49	11,754
Washington .....	54	10	2	42	350	23	1	326
Wisconsin .....	106,515	15,243	1,163	90,109	121,315	15,524	1,456	104,335
Wyoming .....	2,869	64	27	2,778	675	16	7	652

a. Includes data not distributed by category.

b. Data not available.

c. Excludes optional supplementation data.

SOURCE: Data reported to the Social Security Administration by individual states. All data subject to revision.

NOTE: ... = not applicable.

CONTACT: Alfreda Brooks (410) 965-9849.

7.B SSI: State Data

Table 7.B3—Number of persons receiving federally administered payments and average monthly amount, by state or other area, December 2001

State or area	Total		Federal SSI		State supplementation		Number with—		
	Number	Average monthly amount (dollars)	Number	Average monthly amount (dollars)	Number	Average monthly amount (dollars)	Federal SSI only	Federal SSI and state supplementation	State supplementation only
All areas.....	6,688,489	393.96	6,410,138	366.31	2,520,005	113.65	4,168,484	2,241,654	278,351
Alabama.....	161,521	342.90	161,521	342.89	...	...	161,519	...	...
Alaska.....	9,123	359.31	9,123	359.29	...	...	9,123	...	...
Arizona.....	84,796	374.72	84,796	374.73	...	...	84,794	...	...
Arkansas.....	85,088	324.61	85,087	324.61	9	36.64	85,079	8	1
California.....	1,106,294	499.77	925,433	382.23	1,105,325	179.76	969	924,464	180,861
Colorado.....	53,466	355.70	53,466	355.69	...	...	53,465	...	...
Connecticut.....	49,586	375.96	49,586	375.96	...	...	49,586	...	...
Delaware.....	12,197	362.24	12,070	359.04	653	126.45	11,544	526	127
District of Columbia.....	19,973	394.61	19,849	382.87	1,732	163.17	18,241	1,608	124
Florida.....	386,334	366.75	386,334	366.75	3	28.43	386,331	...	...
Georgia.....	198,063	338.42	198,062	338.42	17	34.82	198,046	16	1
Hawaii.....	21,303	411.55	20,509	377.94	19,798	51.39	1,505	19,004	794
Idaho.....	18,840	350.66	18,840	350.66	...	...	18,838	...	...
Illinois.....	249,004	400.65	249,004	400.65	...	...	249,003	...	...
Indiana.....	89,118	367.45	89,118	367.45	...	...	89,118	...	...
Iowa.....	40,716	338.89	40,445	335.57	1,622	141.18	39,094	1,351	271
Kansas.....	36,600	353.45	36,599	353.45	11	34.85	36,589	10	1
Kentucky.....	175,925	364.25	175,925	364.24	...	...	175,925	...	...
Louisiana.....	166,181	359.52	166,179	359.52	22	22.42	166,159	20	2
Maine.....	30,138	330.72	30,138	330.71	...	...	30,138	...	...
Maryland.....	89,180	379.02	89,179	379.02	35	40.15	89,145	34	1
Massachusetts.....	166,874	409.80	147,920	370.02	166,590	81.90	284	147,636	18,954
Michigan.....	210,492	398.60	206,339	396.06	18,374	118.99	192,118	14,221	4,153
Minnesota.....	65,538	366.42	65,538	366.42	...	...	65,536	...	...
Mississippi.....	128,449	336.49	128,447	336.49	21	39.43	128,428	19	2
Missouri.....	113,258	357.05	113,258	357.04	...	...	113,258	...	...
Montana.....	14,206	349.97	14,107	347.69	905	75.91	13,301	806	99
Nebraska.....	21,471	339.03	21,471	339.03	...	...	21,471	...	...
Nevada.....	27,161	364.76	26,335	360.00	7,795	53.59	19,366	6,969	826
New Hampshire.....	11,942	349.52	11,942	349.52	...	...	11,941	...	...
New Jersey.....	147,747	387.95	140,352	362.39	147,038	44.38	709	139,643	7,395
New Mexico.....	47,579	350.29	47,579	350.28	...	...	47,579	...	...
New York.....	622,764	435.05	577,122	390.79	617,587	73.64	5,177	571,945	45,642
North Carolina.....	191,630	325.51	191,630	325.51	...	...	191,630	...	...
North Dakota.....	8,129	310.10	8,129	310.10	...	...	8,129	...	...
Ohio.....	241,763	392.06	241,762	392.06	25	44.27	241,738	24	1
Oklahoma.....	72,756	348.99	72,755	348.98	...	...	72,754	...	...
Oregon.....	54,099	369.79	54,099	369.79	...	...	54,098	...	...
Pennsylvania.....	294,467	408.22	281,918	385.71	289,431	39.89	5,036	276,882	12,549
Rhode Island.....	28,623	401.60	25,874	366.41	28,580	70.58	43	25,831	2,749
South Carolina.....	106,881	338.52	106,881	338.52	...	...	106,879	...	...
South Dakota.....	12,698	327.31	12,698	327.27	12	33.45	12,686	12	...
Tennessee.....	162,920	346.52	162,919	346.52	10	31.36	162,910	9	1
Texas.....	418,235	326.80	418,235	326.80	...	...	418,234	...	...
Utah.....	20,545	367.38	20,537	367.25	1,543	2.76	19,002	1,535	8
Vermont.....	12,554	354.53	11,303	327.44	12,506	60.22	48	11,255	1,251
Virginia.....	132,808	344.18	132,808	344.18	...	...	132,805	...	...
Washington.....	104,700	413.66	102,163	392.70	100,336	31.96	4,364	97,799	2,537
West Virginia.....	72,953	373.25	72,953	373.25	...	...	72,951	...	...
Wisconsin.....	85,333	359.30	85,333	359.29	...	...	85,331	...	...
Wyoming.....	5,790	342.71	5,790	342.70	...	...	5,790	...	...
Outlying area									
Northern Mariana Islands..	677	423.42	677	423.42	...	...	677	...	...

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

NOTE: ... = not applicable.

CONTACT: Art Kahn (410) 965-0186.

Table 7.B7—Total amount, federal payments, and state supplementation, by state or other area, 2001 (in thousands of dollars)

State or area	Total	Federal SSI	State supplementation	
			Federally administered	State administered
All areas.....	33,060,819	28,705,503	3,460,353	894,963
Alabama.....	698,747	698,244	...	503
Alaska.....	92,858	40,434	...	52,424
Arizona.....	382,623	382,249	...	374
Arkansas.....	341,104	341,103	1	...
California.....	6,684,637	4,275,710	2,408,927	...
Colorado.....	315,315	236,648	...	78,667
Connecticut.....	311,512	227,245	...	84,267
Delaware.....	53,110	52,087	1,023	...
District of Columbia.....	97,542	94,145	3,397	...
Florida.....	1,752,175	1,724,204	9	27,962
Georgia.....	826,310	826,306	4	...
Hawaii.....	106,664	94,416	12,248	...
Idaho.....	89,857	80,917	...	8,940
Illinois.....	1,237,215	1,207,560	...	29,655
Indiana.....	402,965	399,185	...	3,780
Iowa.....	183,925	164,585	2,741	16,599
Kansas.....	157,989	157,989	...	...
Kentucky.....	796,683	778,881	...	17,802
Louisiana.....	741,775	741,293	...	482
Maine.....	131,686	122,659	...	9,027
Maryland.....	427,859	419,771	8	8,080
Massachusetts.....	833,337	667,633	165,704	...
Michigan.....	1,099,694	994,836	26,391	78,467
Minnesota.....	369,230	288,792	...	80,438
Mississippi.....	529,598	529,594	4	...
Missouri.....	521,055	495,343	...	25,712
Montana.....	60,977	60,151	826	...
Nebraska.....	96,319	90,012	...	6,307
Nevada.....	120,453	115,385	5,068	...
New Hampshire.....	63,764	52,167	...	11,597
New Jersey.....	700,334	620,880	79,454	...
New Mexico.....	205,492	205,259	...	233
New York.....	3,319,861	2,765,299	554,562	...
North Carolina.....	905,119	769,394	...	135,725
North Dakota.....	33,034	31,104	...	1,930
Ohio.....	1,161,754	1,161,747	7	...
Oklahoma.....	353,139	315,739	...	37,400
Oregon.....	266,179	245,903	...	20,276
Pennsylvania.....	1,464,383	1,327,518	136,865	...
Rhode Island.....	141,034	116,473	24,561	...
South Carolina.....	458,854	445,746	...	13,108
South Dakota.....	53,198	51,001	6	2,191
Tennessee.....	688,916	688,914	2	...
Texas.....	1,682,894	1,682,894	...	...
Utah.....	92,732	92,677	55	...
Vermont.....	53,760	44,574	9,186	...
Virginia.....	575,741	555,064	...	20,677
Washington.....	521,751	492,011	29,390	350
West Virginia.....	335,311	335,311	...	...
Wisconsin.....	491,921	370,606	...	121,315
Wyoming.....	25,221	24,546	...	675
Outlying area				
Northern Mariana Islands.....	3,252	3,252	...	...

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

NOTE: ... = not applicable.

CONTACT: Stella M. Coleman (410) 965-0157 or Alfreda Brooks (410) 965-9849.

7.B SSI: State Data

**Table 7.B8—Number of blind and disabled persons under age 18 receiving federally administered payments, by state or other area, December 2001**

State or area	Total	Blind	Disabled
All areas.....	881,836	6,804	875,032
Alabama.....	25,285	63	25,222
Alaska.....	970	11	959
Arizona.....	13,408	114	13,294
Arkansas.....	13,822	84	13,738
California.....	85,790	1,704	84,086
Colorado.....	6,481	45	6,436
Connecticut.....	5,859	59	5,800
Delaware.....	2,656	10	2,646
District of Columbia.....	3,414	13	3,401
Florida.....	69,066	233	68,833
Georgia.....	28,626	237	28,389
Hawaii.....	1,287	20	1,267
Idaho.....	3,202	37	3,165
Illinois.....	39,026	175	38,851
Indiana.....	17,190	118	17,072
Iowa.....	5,656	87	5,569
Kansas.....	6,159	39	6,120
Kentucky.....	23,571	66	23,505
Louisiana.....	27,606	119	27,487
Maine.....	3,000	21	2,979
Maryland.....	13,715	46	13,669
Massachusetts.....	15,718	489	15,229
Michigan.....	33,729	128	33,601
Minnesota.....	8,755	79	8,676
Mississippi.....	19,601	51	19,550
Missouri.....	16,904	74	16,830
Montana.....	1,855	14	1,841
Nebraska.....	3,339	25	3,314
Nevada.....	4,266	103	4,163
New Hampshire.....	1,640	18	1,622
New Jersey.....	20,271	67	20,204
New Mexico.....	5,625	39	5,586
New York.....	66,957	186	66,771
North Carolina.....	30,330	193	30,137
North Dakota.....	919	11	908
Ohio.....	40,794	246	40,548
Oklahoma.....	10,411	115	10,296
Oregon.....	6,864	71	6,793
Pennsylvania.....	43,976	179	43,797
Rhode Island.....	3,444	11	3,433
South Carolina.....	17,223	164	17,059
South Dakota.....	1,964	6	1,958
Tennessee.....	21,233	170	21,063
Texas.....	50,322	696	49,626
Utah.....	3,501	36	3,465
Vermont.....	1,289	13	1,276
Virginia.....	19,793	114	19,679
Washington.....	12,028	76	11,952
West Virginia.....	7,698	52	7,646
Wisconsin.....	14,563	71	14,492
Wyoming.....	880	2	878
Outlying area			
Northern Mariana Islands.....	154	4	150

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

CONTACT: Art Kahn (410) 965-0186.



Table 7.B9—Number of federally administered awards, by eligibility category, age, and state or other area, 2001

State or area	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18-64	65 or older
All areas.....	770,520	107,820	6,000	656,700	156,970	502,770	110,780
Alabama.....	21,360	1,450	70	19,840	4,790	15,070	1,500
Alaska.....	1,570	160	0	1,410	280	1,130	160
Arizona.....	12,630	1,310	110	11,210	2,460	8,830	1,340
Arkansas.....	10,480	860	100	9,520	2,470	7,140	870
California.....	102,670	29,010	1,130	72,530	14,630	58,490	29,550
Colorado.....	6,090	740	60	5,290	1,140	4,190	760
Connecticut.....	6,710	610	40	6,060	1,200	4,890	620
Delaware.....	1,700	130	10	1,560	410	1,160	130
District of Columbia.....	2,480	300	20	2,160	650	1,510	320
Florida.....	50,950	8,580	280	42,090	12,270	29,850	8,830
Georgia.....	24,210	2,140	250	21,820	5,170	16,840	2,200
Hawaii.....	3,030	710	0	2,320	340	1,980	710
Idaho.....	2,670	270	20	2,380	500	1,900	270
Illinois.....	26,910	2,760	300	23,850	7,120	17,030	2,760
Indiana.....	11,450	670	100	10,680	2,830	7,930	690
Iowa.....	5,130	470	60	4,600	970	3,690	470
Kansas.....	4,980	330	50	4,600	1,150	3,480	350
Kentucky.....	19,060	1,510	50	17,500	4,200	13,320	1,540
Louisiana.....	17,720	1,750	120	15,850	4,540	11,400	1,780
Maine.....	3,700	310	60	3,330	550	2,840	310
Maryland.....	11,920	1,580	50	10,290	2,500	7,810	1,610
Massachusetts.....	17,690	2,490	180	15,020	2,960	12,180	2,550
Michigan.....	22,980	2,000	160	20,820	5,270	15,600	2,110
Minnesota.....	8,300	810	50	7,440	1,680	5,800	820
Mississippi.....	15,520	1,120	50	14,350	4,000	10,400	1,120
Missouri.....	14,930	900	100	13,930	3,030	10,990	910
Montana.....	2,030	130	10	1,890	370	1,530	130
Nebraska.....	3,340	370	20	2,950	670	2,280	390
Nevada.....	5,470	820	130	4,520	910	3,740	820
New Hampshire.....	1,960	70	10	1,880	380	1,510	70
New Jersey.....	18,230	3,290	110	14,830	3,520	11,330	3,380
New Mexico.....	5,480	650	50	4,780	1,050	3,780	650
New York.....	60,240	12,040	170	48,030	9,670	37,610	12,960
North Carolina.....	23,570	2,330	90	21,150	5,390	15,800	2,380
North Dakota.....	890	120	0	770	170	600	120
Ohio.....	25,490	1,460	180	23,850	6,380	17,620	1,490
Oklahoma.....	8,500	800	70	7,630	1,560	6,100	840
Oregon.....	8,270	980	70	7,220	1,450	5,820	1,000
Pennsylvania.....	39,290	3,800	190	35,300	9,680	25,670	3,940
Rhode Island.....	3,110	510	20	2,580	690	1,910	510
South Carolina.....	12,190	990	70	11,130	2,570	8,630	990
South Dakota.....	1,670	210	20	1,440	460	990	220
Tennessee.....	16,910	1,750	260	14,900	3,710	11,420	1,780
Texas.....	54,430	9,420	710	44,300	9,640	35,170	9,620
Utah.....	2,560	210	20	2,330	790	1,560	210
Vermont.....	1,440	120	10	1,310	290	1,030	120
Virginia.....	16,490	2,110	110	14,270	3,890	10,460	2,140
Washington.....	14,300	1,430	90	12,780	2,830	9,980	1,490
West Virginia.....	7,680	400	80	7,200	1,250	6,020	410
Wisconsin.....	9,280	740	80	8,460	2,350	6,190	740
Wyoming.....	760	60	10	690	150	550	60
Outlying area							
Northern Mariana Islands.....	100	40	0	60	40	20	40

SOURCE: Social Security Administration, Supplemental Security Record, 10 percent sample.

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 eligibility category and monthly amount, December 2001**

Monthly amount (dollars)	Total	Adult individuals			Blind and disabled, under age 18
		Aged	Blind	Disabled	
Number .....	5,899,536	933,702	61,692	4,024,690	879,452
Total percent .....	100.0	100.0	100.0	100.0	100.0
Less than 50.00 .....	9.1	15.3	9.1	9.1	2.5
50.00–99.99 .....	6.7	11.4	6.2	6.8	1.2
100.00–149.99 .....	5.4	10.2	5.1	5.1	1.4
150.00–199.99 .....	4.5	8.3	4.4	4.2	1.7
200.00–249.99 .....	4.2	6.3	4.8	4.1	1.9
250.00–299.99 .....	3.3	5.3	3.4	3.1	2.4
300.00–349.99 .....	2.7	3.1	2.8	2.6	2.8
350.00–399.99 .....	6.8	9.9	8.1	6.0	7.1
400.00–449.99 .....	2.1	1.4	1.9	1.6	5.1
450.00–499.99 .....	2.1	1.0	1.5	1.5	6.1
500.00–530.99 .....	1.3	0.5	1.1	1.0	3.5
531.00 <sup>a</sup> .....	51.8	27.2	51.6	54.9	64.2

a. Individuals living in their own household with no countable income were eligible for a federal SSI payment of \$531 in calendar year 2001.

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

CONTACT: Art Kahn (410) 965-0186.

**Table 7.C2—Number and percentage distribution of couples receiving federal SSI payments, by eligibility category and monthly amount, December 2001**

Monthly amount (dollars)	Total	Aged	Blind	Disabled
Number .....	255,542	120,264	2,726	132,552
Total percent .....	100.0	100.0	100.0	100.0
Less than 50.00 .....	4.4	4.8	3.6	4.1
50.00–99.99 .....	4.8	5.0	3.4	4.7
100.00–149.99 .....	4.9	4.8	4.5	4.9
150.00–199.99 .....	4.9	4.7	3.9	5.1
200.00–249.99 .....	4.5	4.1	4.2	4.8
250.00–299.99 .....	4.1	3.3	4.0	4.9
300.00–349.99 .....	3.9	2.9	3.4	4.9
350.00–399.99 .....	3.3	2.5	4.2	4.0
400.00–449.99 .....	2.5	2.3	3.0	2.7
450.00–499.99 .....	2.2	1.9	2.1	2.4
500.00–549.99 .....	6.3	9.9	4.6	3.0
550.00–599.99 .....	1.6	1.3	1.8	1.8
600.00–649.99 .....	1.4	1.2	1.7	1.5
650.00–699.99 .....	1.1	1.0	1.4	1.1
700.00–749.99 .....	1.1	1.4	0.9	0.9
750.00–795.99 .....	0.9	1.1	1.3	0.7
796.00 <sup>a</sup> .....	48.3	47.8	51.9	48.6

a. Couples living in their own household with no countable income were eligible for a federal SSI payment of \$796 in calendar year 2001.

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

CONTACT: Art Kahn (410) 965-0186.

**Table 7.D1—Persons receiving both federally administered payments and other income, average monthly amount of income, by source of income, eligibility category, and age, December 2001**

Source of income	Category				Age		
	Total	Aged	Blind	Disabled	Under 18	18–64	65 or older <sup>a</sup>
Number.....	6,688,489	1,264,478	78,255	5,345,756	881,836	3,811,494	1,995,159
<b>Number with income</b>							
Social Security benefits.....	2,390,092	738,223	26,820	1,625,049	62,429	1,161,971	1,165,692
Other unearned income.....	777,042	234,717	8,765	533,560	157,410	310,256	309,376
Earned income.....	287,163	18,562	5,469	263,132	3,613	254,738	28,812
<b>Percentage with income</b>							
Social Security benefits.....	35.7	58.4	34.3	30.4	7.1	30.5	58.4
Other unearned income.....	11.6	18.6	11.2	10.0	17.9	8.1	15.5
Earned income.....	4.3	1.5	7.0	4.9	0.4	6.7	1.4
<b>Average monthly income (dollars)</b>							
Social Security benefits.....	407.47	407.64	423.19	407.14	186.19	423.39	403.45
Other unearned income.....	131.90	100.72	123.81	145.75	200.16	128.28	100.81
Earned income.....	317.53	293.34	568.44	314.03	349.78	325.96	238.99

a. Includes approximately 18,300 blind and 712,400 disabled persons aged 65 or older.

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

NOTE: See section SSI: History of Provisions for discussion of income.

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 eligibility category, age, and state or other area, December 2001**

State or area	Percentage with Social Security benefits							Average monthly Social Security benefit (dollars)							
	Total	Category			Age			Total	Category				Age		
		Aged	Blind	Dis-abled	Under18	18–64	65 or older		Aged	Blind	Disabled	Under18	18–64	65 or older	
All areas.....	35.7	58.4	34.3	30.4	7.1	30.5	58.4	407.47	407.64	423.19	407.14	186.19	423.39	403.45	
Alabama.....	42.8	86.9	42.3	34.8	9.5	34.8	79.9	390.67	396.87	383.22	387.96	183.84	407.04	389.64	
Alaska.....	31.0	44.1	33.9	28.4	7.2	29.4	45.9	381.05	344.97	401.99	391.71	173.91	409.18	346.62	
Arizona.....	33.0	60.3	26.5	28.0	7.0	28.2	59.6	374.39	362.95	358.88	379.20	182.29	402.21	358.68	
Arkansas.....	45.1	90.0	35.4	37.0	9.6	37.0	83.3	393.23	405.62	376.53	387.90	178.71	406.38	395.84	
California.....	37.1	46.5	36.2	32.9	5.2	32.2	48.3	464.38	440.94	499.13	478.09	218.33	494.26	446.77	
Colorado.....	36.5	57.3	27.9	32.4	7.0	32.8	59.2	394.64	394.74	396.38	394.59	185.18	408.07	388.29	
Connecticut.....	30.6	43.6	26.1	28.4	8.0	28.4	47.0	381.26	370.04	354.47	384.40	187.74	398.49	370.21	
Delaware.....	34.0	67.0	36.1	29.9	6.1	33.6	66.0	400.75	406.89	379.25	399.35	189.12	413.82	402.72	
District of Columbia.....	27.3	66.6	26.2	22.0	5.5	20.1	61.0	387.93	382.65	422.35	389.63	215.36	410.92	380.17	
Florida.....	34.5	52.4	32.2	28.8	7.7	31.8	52.2	381.48	378.48	476.19	383.30	189.23	403.84	377.21	
Georgia.....	40.8	77.7	33.2	33.5	7.1	32.6	73.6	398.29	405.60	379.28	395.19	195.60	410.80	397.13	
Hawaii.....	31.4	39.2	29.4	27.7	5.6	26.9	41.0	409.55	380.97	452.15	428.29	195.82	444.46	384.06	
Idaho.....	36.8	78.6	30.9	32.3	7.5	34.7	75.9	395.67	409.62	407.66	391.81	178.73	404.41	401.55	
Illinois.....	23.8	41.2	24.2	21.2	5.9	21.2	42.9	378.61	374.88	377.33	379.71	180.69	394.48	376.33	
Indiana.....	32.6	75.2	31.5	29.0	7.2	31.6	70.1	386.55	399.79	376.99	383.77	166.56	397.12	394.64	
Iowa.....	39.7	74.8	42.0	35.4	7.5	37.3	72.5	399.42	415.11	394.16	395.57	166.19	404.92	407.31	
Kansas.....	36.4	66.0	31.9	33.2	8.1	35.9	64.3	390.21	406.33	356.69	386.97	170.62	398.95	398.17	
Kentucky.....	35.8	83.9	34.6	30.4	9.2	28.9	74.8	379.40	388.79	365.88	376.62	164.99	393.57	379.08	
Louisiana.....	35.8	81.4	34.6	28.3	7.6	27.2	74.1	377.73	389.07	366.80	372.55	192.01	387.75	381.74	
Maine.....	45.0	87.6	42.4	40.0	12.3	39.1	82.5	399.97	419.75	386.07	394.98	146.78	406.26	408.38	
Maryland.....	29.4	46.5	30.1	25.7	6.2	26.1	49.2	391.68	384.96	386.83	394.34	212.59	410.71	383.46	
Massachusetts.....	37.8	58.3	42.0	29.6	9.5	32.7	57.5	446.02	453.36	464.14	439.50	182.75	450.70	454.37	
Michigan.....	30.2	59.0	31.3	27.3	7.0	27.9	59.8	403.56	410.39	404.02	402.11	175.52	415.76	406.26	
Minnesota.....	32.7	53.1	27.3	29.0	6.4	31.1	51.9	386.74	393.10	364.21	384.88	170.21	395.76	387.45	
Mississippi.....	43.9	88.9	42.2	35.1	8.8	34.3	80.6	384.59	393.39	375.54	380.37	178.24	399.75	384.11	
Missouri.....	38.1	77.2	34.9	33.4	8.4	34.4	72.4	387.21	402.68	368.95	383.11	173.31	395.68	392.65	
Montana.....	39.0	80.4	35.4	34.8	7.4	35.3	77.0	399.51	410.87	359.96	397.24	192.09	408.06	398.79	
Nebraska.....	40.4	73.6	35.8	36.4	7.7	39.5	70.2	398.03	413.27	382.14	394.48	170.55	405.92	403.22	
Nevada.....	33.8	59.2	36.5	24.2	5.4	29.5	58.6	427.77	435.53	446.74	419.59	188.02	431.85	435.97	
New Hampshire.....	37.8	70.7	34.1	35.0	12.3	35.8	69.9	391.34	378.74	420.73	393.22	158.22	408.55	387.15	
New Jersey.....	32.4	43.2	34.8	29.2	7.0	30.2	46.1	408.61	396.43	413.07	414.02	205.11	431.87	397.63	
New Mexico.....	39.8	73.3	31.6	32.2	6.9	30.0	69.0	375.41	368.79	362.01	379.08	202.06	397.88	364.77	
New York.....	31.7	44.9	36.5	27.9	6.3	27.2	46.3	432.78	421.76	433.11	437.85	191.68	459.91	418.45	
North Carolina.....	44.8	84.7	36.1	36.8	8.3	37.3	78.5	389.66	399.22	380.09	385.32	184.78	404.23	388.45	
North Dakota.....	46.5	80.9	34.9	40.1	7.3	41.3	74.5	383.35	392.57	356.80	380.13	165.28	389.22	384.84	
Ohio.....	27.1	61.9	27.6	24.4	6.4	24.7	60.6	377.40	388.20	377.31	375.32	175.06	387.05	383.63	
Oklahoma.....	38.0	80.2	31.9	31.3	6.7	30.8	74.0	385.90	399.06	371.46	380.59	187.00	393.48	388.60	
Oregon.....	35.2	56.7	32.0	31.8	6.2	33.3	57.8	398.47	402.93	361.77	397.69	196.04	407.26	395.92	
Pennsylvania.....	32.0	66.1	33.0	27.3	7.1	27.4	62.5	416.09	439.60	413.42	408.32	181.44	424.42	423.74	
Rhode Island.....	40.0	64.6	47.2	35.2	8.3	36.2	63.0	440.66	468.56	418.27	431.27	169.68	446.11	449.53	
South Carolina.....	41.6	86.5	37.7	33.7	7.6	33.4	78.6	386.48	392.30	371.96	384.10	192.66	400.69	385.08	
South Dakota.....	41.9	74.4	30.0	36.2	7.6	38.7	69.6	381.78	412.09	398.87	370.44	144.58	384.12	394.24	
Tennessee.....	40.5	85.2	31.3	33.8	8.0	32.5	76.5	388.31	397.04	373.26	385.09	184.36	400.91	386.34	
Texas.....	42.3	69.1	31.6	32.2	5.4	30.6	68.6	377.60	372.87	363.43	381.73	201.21	399.11	369.66	
Utah.....	30.3	49.2	21.6	28.2	5.7	31.3	50.3	382.99	376.64	319.41	384.94	199.03	394.35	376.92	
Vermont.....	49.6	88.7	50.0	44.4	10.1	44.0	83.3	432.96	447.83	397.71	429.41	162.73	441.05	435.18	
Virginia.....	38.4	63.1	34.5	33.0	7.7	33.7	63.2	388.63	395.25	380.06	385.95	172.94	401.64	388.78	
Washington.....	28.7	36.3	28.1	27.5	5.9	28.3	41.2	404.91	400.89	391.99	405.90	185.75	417.22	396.70	
West Virginia.....	32.5	82.8	30.9	28.6	9.6	26.7	69.9	380.45	397.83	376.05	376.57	163.50	389.26	384.53	
Wisconsin.....	35.4	68.9	29.0	31.3	6.8	33.6	66.3	395.50	407.23	390.53	392.36	173.09	403.02	403.05	
Wyoming.....	38.6	83.2	36.5	34.1	8.3	36.0	79.0	397.02	416.72	418.58	391.95	170.63	405.12	403.76	
Outlying area															
Northern Mariana Islands.....	29.2	48.7	37.5	22.9	1.9	31.8	46.2	282.28	260.19	269.17	297.76	154.67	306.37	259.48	

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

CONTACT: Art Kahn (410) 965-0186.

Table 7.E2—Number and percentage distribution of federally administered awards, by sex, age, and eligibility category, 2001

Sex and age	Total	Adults			Blind and disabled children <sup>a</sup>
		Aged	Blind	Disabled	
<b>All persons</b>					
Total					
Number .....	770,520	107,820	4,920	496,360	161,420
Percent .....	100.0	100.0	100.0	100.0	100.0
<i>Percentage distribution by sex</i>					
Male .....	49.8	36.1	48.0	48.5	62.9
Female .....	50.2	63.9	52.0	51.5	37.1
<i>Percentage distribution by age</i>					
Under 5 .....	8.4	...	...	...	40.2
5-9 .....	5.6	...	...	...	26.5
10-14 .....	4.7	...	...	...	22.6
15-17 .....	1.7	...	...	...	7.9
18-21 .....	5.3	...	16.9	7.2	2.8
22-29 .....	5.7	...	12.0	8.8	...
30-39 .....	11.8	...	14.0	18.2	...
40-49 .....	17.3	...	22.4	26.6	...
50-59 .....	19.4	...	22.6	29.8	...
60-64 .....	5.7	...	8.3	9.4	...
65-69 .....	8.1	55.8	1.2	...	...
70-74 .....	2.8	19.7	0.4	...	...
75-79 .....	1.6	11.5	0.2	...	...
80 or older .....	1.8	13.0	2.0	...	...
<b>Male</b>					
Subtotal .....	383,620	38,970	2,360	240,820	101,470
Total percent .....	100.0	100.0	100.0	100.0	100.0
Under 5 .....	9.9	...	...	...	37.4
5-9 .....	7.8	...	...	...	29.4
10-14 .....	6.2	...	...	...	23.6
15-17 .....	1.9	...	...	...	7.0
18-21 .....	6.1	...	19.9	8.5	2.6
22-29 .....	5.9	...	11.9	9.3	...
30-39 .....	11.2	...	12.3	17.7	...
40-49 .....	16.9	...	22.5	26.7	...
50-59 .....	18.4	...	21.2	29.1	...
60-64 .....	5.2	...	8.5	8.6	...
65-69 .....	6.2	59.2	0.4	...	...
70-74 .....	2.2	21.0	0.8	...	...
75-79 .....	1.1	11.1	0.4	...	...
80 or older .....	0.9	8.7	2.1	...	...
<b>Female</b>					
Subtotal .....	386,900	68,850	2,560	255,540	59,950
Total percent .....	100.0	100.0	100.0	100.0	100.0
Under 5 .....	7.0	...	...	...	44.9
5-9 .....	3.3	...	...	...	21.6
10-14 .....	3.2	...	...	...	20.9
15-17 .....	1.5	...	...	...	9.5
18-21 .....	4.6	...	14.1	6.1	3.2
22-29 .....	5.5	...	12.1	8.3	...
30-39 .....	12.4	...	15.6	18.6	...
40-49 .....	17.6	...	22.3	26.5	...
50-59 .....	20.3	...	23.8	30.5	...
60-64 .....	6.3	...	8.2	10.1	...
65-69 .....	9.9	53.8	2.0	...	...
70-74 .....	3.4	19.0	0.0	...	...
75-79 .....	2.1	11.7	0.0	...	...
80 or older .....	2.8	15.4	2.0	...	...

a. Includes students aged 18-21.

SOURCE: Social Security Administration, Supplemental Security Record, 10 percent sample.

NOTE: ... = not applicable.

CONTACT: Clark Pickett (410) 965-9016.

## 7.E SSI: Recipient Characteristics

**Table 7.E3—Number and percentage distribution of persons receiving federally administered payments, by sex, age, and eligibility category, December 2001**

Sex and age	All recipients	Adults			Blind and disabled, under age 18
		Aged	Blind	Disabled	
<b>All persons</b>					
Total number .....	6,688,489	1,264,463	71,451	4,470,739	881,836
Total percent .....	100.0	100.0	100.0	100.0	100.0
<i>Percentage distribution by sex</i>					
Male .....	41.7	29.4	43.0	40.8	63.9
Female .....	58.3	70.6	57.0	59.2	36.1
<i>Percentage distribution by age</i>					
Under 5 .....	2.1	...	...	...	16.1
5-9 .....	3.6	...	...	...	27.4
10-14 .....	4.8	...	...	...	36.5
15-17 .....	2.6	...	...	...	19.9
18-21 .....	3.5	...	6.0	5.2	...
22-29 .....	6.8	...	11.2	10.1	...
30-39 .....	10.9	...	15.3	16.1	...
40-49 .....	14.6	...	17.2	21.5	...
50-59 .....	14.3	...	16.6	21.2	...
60-64 .....	6.8	...	8.0	10.1	...
65-69 .....	7.6	15.3	7.1	7.0	...
70-74 .....	7.7	24.4	6.4	4.5	...
75-79 .....	6.4	25.2	5.0	2.4	...
80 or older .....	8.1	35.0	7.1	2.1	...
<b>Male</b>					
Subtotal .....	2,791,482	372,345	30,731	1,824,525	563,881
Total percent .....	100.0	100.0	100.0	100.0	100.0
Under 5 .....	2.9	...	...	...	14.5
5-9 .....	5.7	...	...	...	28.1
10-14 .....	7.6	...	...	...	37.7
15-17 .....	4.0	...	...	...	19.7
18-21 .....	4.8	...	7.2	7.3	...
22-29 .....	8.6	...	13.9	12.9	...
30-39 .....	12.3	...	18.5	18.5	...
40-49 .....	15.0	...	19.2	22.6	...
50-59 .....	12.7	...	15.8	19.2	...
60-64 .....	5.8	...	7.2	8.8	...
65-69 .....	6.1	18.4	5.9	5.5	...
70-74 .....	5.9	28.5	4.8	3.1	...
75-79 .....	4.3	25.9	3.5	1.3	...
80 or older .....	4.2	27.2	4.0	0.8	...
<b>Female</b>					
Subtotal .....	3,897,007	892,118	40,720	2,646,214	317,955
Total percent .....	100.0	100.0	100.0	100.0	100.0
Under 5 .....	1.5	...	...	...	18.9
5-9 .....	2.1	...	...	...	26.1
10-14 .....	2.8	...	...	...	34.6
15-17 .....	1.7	...	...	...	20.4
18-21 .....	2.6	...	5.1	3.7	...
22-29 .....	5.6	...	9.2	8.1	...
30-39 .....	9.9	...	12.9	14.4	...
40-49 .....	14.3	...	15.8	20.8	...
50-59 .....	15.5	...	17.2	22.5	...
60-64 .....	7.5	...	8.6	10.9	...
65-69 .....	8.8	14.0	8.0	8.1	...
70-74 .....	8.9	22.7	7.7	5.4	...
75-79 .....	7.9	24.9	6.1	3.1	...
80 or older .....	10.9	38.3	9.4	3.0	...

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

NOTE: . . . = not applicable.

CONTACT: Art Kahn (410) 965-0186.

**Table 7.E4—Number and percentage distribution of persons with representative payees receiving federally administered payments, by eligibility category and age, December 2001**

Category and age	Number			Percentage distribution		
	Total	With representative payee	Without representative payee	Total	With representative payee	Without representative payee
Total .....	6,688,489	2,283,985	4,404,504	100.0	34.1	65.9
Category						
Aged .....	1,264,478	46,926	1,217,552	100.0	3.7	96.3
Blind .....	78,255	18,784	59,471	100.0	24.0	76.0
Disabled .....	5,345,756	2,218,275	3,127,481	100.0	41.5	58.5
Age						
Under 18 .....	881,836	880,713	1,123	100.0	99.9	0.1
18–64 .....	3,811,494	1,251,437	2,560,057	100.0	32.8	67.2
65 or older .....	1,995,159	151,835	1,843,324	100.0	7.6	92.4

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

CONTACT: Arthur Kahn (410) 965-0186.

**Table 7.E5—Number and percentage distribution of persons receiving federally administered payments, by eligibility category, age, and living arrangement, December 2001**

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 .....	6,688,489	1,264,478	78,255	5,345,756	881,836	3,811,494	1,995,159
Total percent .....	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Own household .....	93.8	90.8	92.2	94.5	95.4	94.4	91.9
Another's household .....	4.1	7.3	5.2	3.3	3.1	3.7	5.2
Institutional care covered by Medicaid .....	2.1	1.9	2.6	2.2	1.5	1.9	2.8

a. As defined for determination of federal SSI payment standards.

b. Includes 18,300 persons aged 65 or older.

c. Includes 712,400 persons aged 65 or older.

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

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 1982–2001, 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

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

CONTACT: Lenna D. Kennedy (410) 965-9846.

## 7.F SSI: Disability

**Table 7.F1.—Number and percentage distribution of blind and disabled persons under age 65 receiving federally administered payments and not transferred from prior state programs, by diagnostic group, December 2001**

Diagnostic group	Number				Percentage distribution			
	Total	Aged 18–64		Under age 18, blind and disabled	Total	Aged 18–64		Under age 18, blind and disabled
		Blind	Disabled			Blind	Disabled	
Total .....	4,693,330	51,236	3,760,243	881,836	...	...	...	...
Diagnosis available.....	4,309,398	45,466	3,416,906	847,026	100.0	100.0	100.0	100.0
Infectious and parasitic diseases .....	73,513	118	70,487	2,908	1.7	0.3	2.1	0.3
Neoplasms .....	51,802	83	42,473	9,246	1.2	0.2	1.2	1.1
Endocrine, nutritional, and metabolic diseases.....	172,371	495	165,360	6,516	4.0	1.1	4.8	0.8
Diseases of blood and blood-forming organs .....	26,627	7	14,082	12,538	0.6	0.0	0.4	1.5
Mental disorders								
Mental retardation .....	1,085,032	1,051	830,594	253,387	25.2	2.3	24.3	29.9
Other .....	1,523,835	451	1,226,590	296,794	35.4	1.0	35.9	35.0
Diseases of the—								
Nervous system and sense organs.....	384,411	41,395	249,055	93,961	8.9	91.0	7.3	11.1
Circulatory system.....	188,982	873	183,636	4,473	4.4	1.9	5.4	0.5
Respiratory system .....	109,004	43	83,202	25,759	2.5	0.1	2.4	3.0
Digestive system .....	36,197	20	32,079	4,098	0.8	0	0.9	0.5
Genitourinary system .....	43,255	165	40,478	2,612	1.0	0.4	1.2	0.3
Skin and subcutaneous tissue .....	6,651	18	5,730	903	0.2	0	0.2	0.1
Musculoskeletal system and connective tissue.....	354,108	172	345,897	8,039	8.2	0.4	10.1	0.9
Congenital anomalies .....	62,730	320	17,473	44,937	1.5	0.7	0.5	5.3
Injuries .....	103,284	169	98,298	4,817	2.4	0.4	2.9	0.6
Other.....	87,596	86	11,472	76,038	2.0	0.2	0.3	9.0

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

NOTE: ... = not applicable.

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



**Table 7.F2—Number and percentage distribution of blind and disabled persons under age 65 receiving federally administered payments, by diagnostic group, age, and sex, December 2001**

Diagnostic group	All ages	Under 5	5–12	13–17	18–21	22–29	30–39	40–49	50–59	60–64
	<b>Total</b>									
Total .....	4,693,330	142,095	435,839	303,902	235,067	457,483	728,991	975,207	958,957	455,774
Number with diagnosis available .....	4,309,398	133,588	417,908	295,530	230,130	436,705	677,841	878,677	839,440	399,579
Percentage with diagnosis available.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Infectious and parasitic diseases .....	1.7	0.2	0.4	0.3	0.2	0.7	2.8	3.2	1.9	1.1
Neoplasms .....	1.2	1.6	1.2	0.7	0.9	0.7	0.7	1.2	1.8	2.0
Endocrine, nutritional, and metabolic diseases.....	4.0	1.2	0.7	0.6	0.7	1.4	2.8	5.1	7.6	7.7
Diseases of blood and blood-forming organs .....	0.6	1.6	1.6	1.3	1.1	0.9	0.5	0.3	0.2	0.1
Mental disorders										
Mental retardation .....	25.2	6.5	27.7	43.6	48.4	45.1	33.6	19.6	11.3	7.1
Other .....	35.4	17.7	40.1	35.8	26.1	30.1	37.9	44.3	34.9	24.3
Diseases of the—										
Nervous system and sense organs.....	8.9	11.3	12.0	9.7	14.2	12.2	9.4	7.1	6.4	6.1
Circulatory system.....	4.4	1.3	0.5	0.3	0.6	0.9	1.5	3.4	9.3	15.3
Respiratory system .....	2.5	7.0	2.9	1.4	0.6	0.6	0.8	1.7	4.2	5.9
Digestive system .....	0.8	1.6	0.3	0.2	0.2	0.3	0.6	1.2	1.3	1.1
Genitourinary system .....	1.0	0.4	0.3	0.3	0.7	1.1	1.3	1.3	1.2	0.9
Skin and subcutaneous tissue .....	0.2	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.2
Musculoskeletal system and connective tissue....	8.2	0.9	0.9	1.1	1.2	1.8	4.1	8.1	16.4	24.6
Congenital anomalies .....	1.5	13.8	4.8	2.2	2.3	1.2	0.6	0.2	0.1	0.1
Injuries .....	2.4	0.8	0.5	0.5	1.7	2.7	3.0	2.9	2.9	3.2
Other .....	2.0	33.9	6.0	2.0	1.0	0.4	0.3	0.3	0.3	0.2
	<b>Male</b>									
Subtotal.....	2,217,980	81,959	287,760	194,173	134,526	239,404	343,605	417,948	355,593	163,012
Number with diagnosis available .....	2,041,882	77,166	276,613	188,816	131,719	228,593	320,065	373,851	304,773	140,286
Percentage with diagnosis available.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Infectious and parasitic diseases .....	2.1	0.2	0.3	0.2	0.2	0.6	3.6	4.5	2.9	1.5
Neoplasms .....	1.1	1.5	1.0	0.7	0.9	0.7	0.5	1.0	1.9	2.2
Endocrine, nutritional, and metabolic diseases.....	1.9	1.2	0.6	0.5	0.6	1.0	1.7	2.6	3.9	4.2
Diseases of blood and blood-forming organs .....	0.6	1.6	1.4	1.1	1.0	0.8	0.4	0.2	0.1	0.1
Mental disorders										
Mental retardation .....	27.8	7.2	26.5	41.0	47.3	44.5	35.4	21.7	13.2	8.4
Other .....	36.2	21.0	45.5	41.1	28.7	31.3	36.8	43.5	32.6	21.3
Diseases of the—										
Nervous system and sense organs.....	9.0	11.0	10.2	8.4	13.6	12.1	9.4	7.0	6.6	6.5
Circulatory system.....	4.2	1.2	0.4	0.2	0.5	0.8	1.4	3.6	11.7	18.9
Respiratory system .....	2.2	7.8	2.8	1.4	0.5	0.4	0.5	1.1	4.0	6.5
Digestive system .....	0.8	1.6	0.3	0.2	0.2	0.3	0.5	1.4	1.7	1.4
Genitourinary system .....	1.0	0.4	0.3	0.3	0.6	1.0	1.3	1.5	1.5	1.0
Skin and subcutaneous tissue .....	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.2
Musculoskeletal system and connective tissue....	6.0	0.8	0.7	0.7	0.8	1.3	3.2	7.1	14.9	22.7
Congenital anomalies .....	1.6	12.9	3.9	1.7	2.1	1.1	0.5	0.2	0.1	0.1
Injuries .....	3.1	0.8	0.5	0.5	2.0	3.6	4.3	4.2	4.4	4.7
Other .....	2.4	30.8	5.6	1.9	1.0	0.4	0.3	0.3	0.3	0.2
	<b>Female</b>									
Subtotal.....	2,475,335	60,136	148,079	109,729	100,541	218,079	385,386	557,259	603,364	292,762
Number with diagnosis available .....	2,267,516	56,422	141,295	106,714	98,411	208,112	357,776	504,826	534,667	259,293
Percentage with diagnosis available.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Infectious and parasitic diseases .....	1.4	0.3	0.6	0.3	0.3	0.7	2.1	2.2	1.3	0.9
Neoplasms .....	1.3	1.7	1.5	0.9	0.9	0.7	0.8	1.3	1.7	1.9
Endocrine, nutritional, and metabolic diseases.....	5.9	1.3	1.0	0.9	0.9	1.7	3.8	6.9	9.7	9.6
Diseases of blood and blood-forming organs .....	0.6	1.5	2.0	1.5	1.3	1.0	0.5	0.3	0.2	0.2
Mental disorders										
Mental retardation .....	22.8	5.6	30.1	48.1	49.9	45.7	31.9	18.0	10.3	6.5
Other .....	34.6	13.2	29.3	26.4	22.6	28.7	38.9	44.9	36.1	25.9
Diseases of the—										
Nervous system and sense organs.....	8.9	11.8	15.6	11.9	15.0	12.2	9.4	7.2	6.3	5.9
Circulatory system.....	4.6	1.4	0.6	0.3	0.6	0.9	1.5	3.2	8.0	13.4
Respiratory system .....	2.8	5.9	3.1	1.5	0.8	0.8	1.2	2.1	4.4	5.6
Digestive system .....	0.8	1.7	0.4	0.3	0.3	0.4	0.7	1.1	1.1	0.9
Genitourinary system .....	1.0	0.3	0.3	0.4	0.7	1.1	1.3	1.2	1.1	0.8
Skin and subcutaneous tissue .....	0.2	0.2	0.1	0.2	0.1	0.2	0.2	0.2	0.2	0.2
Musculoskeletal system and connective tissue....	10.2	1.0	1.3	1.7	1.8	2.4	4.9	8.9	17.2	25.6
Congenital anomalies .....	1.3	15.1	6.6	2.9	2.6	1.3	0.6	0.2	0.1	0.1
Injuries .....	1.8	0.8	0.7	0.5	1.2	1.7	1.9	1.9	2.0	2.4
Other .....	1.7	38.2	6.7	2.1	1.0	0.4	0.3	0.3	0.3	0.2

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

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

## 7.F SSI: Disability

**Table 7.F3—Number of persons receiving special Supplemental Security Income payments and extended Medicaid coverage, for selected months 1982–2001**

Reporting month	Section 1619(a)		Continuation of Medicaid coverage only (Section 1619(b))	
	Number	Percentage change over prior reporting month	Number <sup>a</sup>	Percentage change over prior reporting month
December				
1982 .....	287	...	5,515	...
1983 .....	392	...	5,165	...
1984 .....	b	b	b	b
1985 .....	b	b	b	b
1986 .....	b	b	b	b
1987 .....	14,559	...	15,632	...
1988 .....	19,920	36.8	15,625	0.0
1989 .....	25,655	28.8	18,254	16.8
1990 .....	13,994	-45.5	23,517	28.8
1991 .....	15,531	11.0	27,264	15.9
1992 .....	17,603	13.3	31,649	16.1
1993 .....	20,028	13.8	35,299	11.5
1994 .....	24,315	21.4	40,683	15.3
1995 .....	28,060	15.4	47,002	15.5
1996 .....	31,085	10.8	51,905	10.4
1997 .....	34,673	11.5	57,089	10.0
1998 .....	37,271	7.5	59,542	4.3
1999 .....	25,528	-31.5	69,265	16.3
2000 .....	27,542	7.9	83,572	20.7
2001 .....	22,100	-19.8	76,455	-8.5
1999				
March .....	39,457	5.9	63,431	6.5
June .....	23,304	-40.9	66,939	5.5
September .....	23,914	2.6	70,580	5.4
December .....	25,528	6.7	69,265	-1.9
2000				
March .....	25,055	-1.9	69,545	0.4
June .....	25,837	3.1	77,782	11.8
September .....	26,180	1.3	84,199	8.2
December .....	27,542	5.2	83,572	-0.7
2001				
March .....	26,775	-2.8	78,657	-5.9
June .....	25,394	-5.2	77,901	-1.0
September .....	25,194	-0.8	78,543	0.8
December .....	22,100	-12.3	76,455	-2.7

a. Includes blind participants. For December 2001, of the 76,455 participants, 1,202 were blind.

b. Data not available.

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

NOTES: When the substantial gainful activity (SGA) level is periodically raised, SSI recipients with earnings below the increased SGA level become eligible for regular SSI benefits, rather than the special cash payments under section 1619(a). This is reflected in the decreases in 1619(a) participants shown for 1990, June 1999, June 2001, and December 2001.

... = not applicable.

CONTACT: Clark Pickett (410) 965-9016.

**Table 7.F4—Number of persons receiving special Supplemental Security Income payments and extended Medicaid coverage, by age, sex, types and amounts of earned and unearned income, December 2001**

Selected characteristics	Section 1619(a)		Continuation of Medicaid coverage only (Section 1619(b))	
	Number	Average earnings (dollars)	Number	Average earnings (dollars)
Total .....	21,417	1,005	72,595	1,028
Age				
Under 18 .....	149	932	204	a
18–21 .....	2,138	975	2,643	1,102
22–29 .....	6,298	994	17,409	1,104
30–39 .....	6,050	1,014	22,105	1,015
40–49 .....	4,368	1,016	17,359	1,002
50–59 .....	1,951	1,020	8,238	1,013
60–64 .....	354	1,026	2,450	900
65 or older .....	109	988	2,187	817
Sex				
Male .....	11,639	1,012	38,032	1,039
Female .....	9,778	996	34,563	1,016
Earned income <sup>b</sup>				
Wages .....	21,003	1,005	70,915	1,033
Self-employment .....	508	980	2,228	949
Earnings level (dollars)				
Less than 400.00 .....	...	...	10,311	268
400.00–499.00 .....	...	...	6,342	436
500.00–599.00 .....	...	...	7,262	528
600.00–699.00 .....	...	...	6,525	630
700.00–899.00 .....	6,309	827	8,374	772
900.00–1,199.00 .....	12,388	1,018	6,936	1,021
1,200.00 or more .....	2,720	1,359	26,845	1,774
Unearned income <sup>b</sup>				
None .....	18,861	1,008	23,610	1,585
Social Security .....	743	939	45,647	705
Other pensions .....	38	1,007	520	859
Assistance based on need .....	2	917	30	1,031
Interest, dividends .....	1,317	1,010	5,064	919
Other .....	575	966	3,052	1,158

a. Data not available.

b. Persons with more than one type are shown under each type.

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

NOTE: ... = not applicable.

CONTACT: Clark Pickett (410) 965-9016.

7.F SSI: Disability

**Table 7.F5—Number of persons receiving special Supplemental Security Income payments and extended Medicaid coverage and average monthly earnings, by state or other area, December 2001**

State or area	Section 1619(a)		Continuation of Medicaid coverage only (Section 1619(b))	
	Number	Average earnings (dollars)	Number	Average earnings (dollars)
All areas.....	22,100	1,004	76,455	1,043
Alabama.....	263	984	836	1,151
Alaska <sup>a</sup> .....	40	998	152	1,168
Arizona.....	238	975	861	1,049
Arkansas.....	195	994	781	964
California.....	4,186	1,106	6,778	1,306
Colorado.....	245	958	1,036	1,088
Connecticut <sup>a</sup> .....	174	959	1,116	914
Delaware.....	49	971	302	1,121
District of Columbia.....	73	952	228	1,352
Florida.....	861	967	3,268	1,027
Georgia.....	455	976	1,722	1,055
Hawaii <sup>a</sup> .....	46	950	116	1,003
Idaho <sup>a</sup> .....	98	943	479	960
Illinois <sup>a</sup> .....	966	960	2,951	1,036
Indiana <sup>a</sup> .....	355	965	1,534	908
Iowa.....	224	990	1,703	810
Kansas <sup>a</sup> .....	181	975	1,100	937
Kentucky.....	288	969	1,167	1,112
Louisiana.....	484	964	1,351	980
Maine.....	116	976	705	970
Maryland.....	333	976	1,275	1,128
Massachusetts.....	838	1,021	3,313	1,156
Michigan.....	908	961	3,862	1,021
Minnesota <sup>a</sup> .....	353	965	2,320	891
Mississippi.....	321	963	825	1,070
Missouri <sup>a</sup> .....	336	974	1,645	854
Montana.....	68	952	388	820
Nebraska <sup>a</sup> .....	146	969	661	887
Nevada <sup>a</sup> .....	75	990	312	1,058
New Hampshire <sup>a</sup> .....	61	957	382	950
New Jersey.....	432	986	1,821	1,136
New Mexico.....	134	973	508	1,033
New York.....	1,976	1,024	5,842	1,221
North Carolina.....	360	982	1,744	975
North Dakota <sup>a</sup> .....	38	967	304	759
Ohio <sup>a</sup> .....	1,109	969	3,425	956
Oklahoma <sup>a</sup> .....	193	959	663	890
Oregon <sup>a</sup> .....	174	965	995	860
Pennsylvania.....	1,136	996	3,453	1,008
Rhode Island.....	106	1,025	364	1,048
South Carolina.....	244	974	991	992
South Dakota.....	63	980	520	823
Tennessee.....	327	967	1,461	1,134
Texas.....	915	966	3,527	986
Utah <sup>a</sup> .....	114	936	432	883
Vermont.....	107	1,028	378	938
Virginia <sup>a</sup> .....	405	971	1,526	984
Washington.....	629	988	1,903	1,077
West Virginia.....	145	974	462	1,118
Wisconsin.....	478	986	2,763	890
Wyoming.....	35	981	197	815
Outlying area				
Northern Mariana Islands.....	4	976	7	929

a. Initial Medicaid determinations are made by the state after identification of potentially eligible persons by the Social Security Administration.

SOURCE: Social Security Administration, Supplemental Security Record, 100 percent data.

CONTACT: Clark Pickett (410) 965-9016.

Table 8.A1—Hospital Insurance, 1966–2001 (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</sup>	Total	Benefit payments <sup>b</sup>	Administrative expenses		
					Uninsured persons	Military wage credits					Amount <sup>c</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>d</sup>	141	9	746	13,679	13,340	339	2.5	10,605
1977	15,856	14,114	...	<sup>e</sup>	<sup>d</sup> 803	<sup>f</sup> 143	12	784	16,019	15,737	283	1.8	10,442
1978	19,213	17,324	...	<sup>e</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	98,164
1983	44,570	37,259	...	358	878	<sup>h</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>i</sup> -719	41	3,362	48,414	47,580	834	1.8	<sup>g</sup> 20,499
1986	59,267	54,583	...	364	566	91	43	3,619	50,422	49,758	664	1.3	<sup>g</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>j</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>k</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>l</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>m</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>m</sup> 128,766	1,866	1.4	141,385
2000	167,185	144,351	8,787	465	470	2	1,382	11,729	131,095	<sup>m</sup> 128,458	2,636	2.1	177,475
2001	174,630	151,994	7,533	470	453	<sup>n</sup> -1,175	1,370	13,986	143,379	<sup>m</sup> 141,183	2,195	1.6	208,726

- a. Other income includes recoveries of amounts reimbursed from the trust fund which are not obligations of the trust fund, receipts from the fraud and abuse control program, and a small amount of miscellaneous income.
- b. Includes costs of Peer Review Organizations (beginning with the implementation of the Prospective Payment System on Oct. 1, 1983).
- c. Includes costs of experiments and demonstration projects. Beginning in 1997, includes fraud and abuse control expenses, as provided for by P.L. 104–91.
- d. 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.
- e. 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.
- f. Includes \$2 million in reimbursements 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.
- g. 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.
- h. The lump-sum general revenue transfer, as provided for by section 151 of P.L. 98–21.
- i. Includes the lump-sum general revenue adjustment of -\$805 million, as provided for by section 151 of P.L. 98–21.
- j. Includes the lump-sum general revenue adjustment of -\$1,100 million, as provided for by section 151 of P.L. 98–21.
- k. Includes \$1,805 million transfer from the Supplementary Medical Insurance (SMI) catastrophic coverage reserve fund, as provided for by P.L. 102–394.
- l. Includes the lump-sum general revenue adjustment of -\$2,366 million, as provided for by section 151 of P.L. 98–21.
- m. Includes monies transferred to the SMI trust fund for home health agency costs, as provided for by P.L. 105–33.
- n. Includes the lump-sum general revenue adjustment of -\$1,177 million, as provided by section 151 of P.L. 98–21.

SOURCE: 2002 Annual Report of the Board of Trustees of the Federal Hospital Insurance Trust Fund, Table II.B6, and analogous tables from earlier Annual Reports.

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

... = not applicable.

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## 8.A Medicare: Trust Funds

**Table 8.A2—Supplementary Medical Insurance, 1966–2001 (in millions of dollars)**

Year	Receipts						Expenditures				Balance <sup>a</sup>
	Total	Premiums from participants			Government contributions <sup>b</sup>	Interest and other income <sup>c</sup>	Total	Benefit payments	Administrative expenses		Trust fund assets at end of year
		Total	Aged	Disabled					Amount	Percentage of benefit payments	
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	229	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>d</sup> 3,722	<sup>d</sup> 3,356	<sup>d</sup> 366	<sup>d</sup> 11,291	361	14,028	13,113	915	7.0	5,877
1982	16,580	<sup>d</sup> 3,697	<sup>d</sup> 3,341	<sup>d</sup> 356	<sup>d</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>e</sup> 7,409	<sup>e</sup> 6,747	<sup>e</sup> 661	<sup>e</sup> 23,560	875	31,740	30,820	920	3.0	8,394
1988	35,825	<sup>e</sup> 8,761	<sup>e</sup> 7,983	<sup>e</sup> 778	<sup>e</sup> 26,203	861	35,230	33,970	1,260	3.7	8,990
1989	<sup>f</sup> 44,349	<sup>f, g</sup> 12,263	9,793	993	30,852	<sup>f</sup> 1,234	<sup>f</sup> 39,783	38,294	<sup>f</sup> 1,489	3.9	<sup>f</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>h</sup> 14,077	<sup>h</sup> 12,814	<sup>h</sup> 1,263	<sup>h</sup> 41,359	1,801	50,830	49,260	1,570	3.2	24,235
1993	57,679	<sup>h</sup> 14,193	<sup>h</sup> 12,731	<sup>h</sup> 1,462	<sup>h</sup> 41,465	2,021	57,784	<sup>i</sup> 55,784	2,000	3.7	24,131
1994	55,607	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>j</sup> 20,933	<sup>j</sup> 18,594	<sup>j</sup> 2,338	<sup>j</sup> 64,068	2,711	77,630	<sup>k</sup> 76,125	1,505	2.0	46,212
1999	80,902	<sup>j</sup> 18,967	<sup>j</sup> 16,604	<sup>j</sup> 2,362	<sup>j</sup> 59,095	2,841	82,327	<sup>k</sup> 80,724	1,603	2.0	44,787
2000	89,903	20,555	17,892	2,664	<sup>j</sup> 65,898	3,450	90,663	<sup>k</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>k</sup> 99,663	1,723	1.7	41,270

a. The financial status of the program depends on both the assets and the liabilities of the program.

b. General fund matching payments, plus certain interest-adjustment items.

c. Other income includes recoveries of amounts reimbursed from the trust fund that are not obligations of the trust fund and other miscellaneous income.

d. 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 Dec. 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 Dec. 31, 1981. These amounts are excluded from the premium income and general revenue income for calendar year 1982.

e. Delivery of benefit checks normally due January 1988 occurred on Dec. 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 Dec. 31, 1987. These amounts are excluded from the premium income and general revenue income for calendar year 1988; see footnote d.

f. Includes the impact of the Medicare Catastrophic Coverage Act of 1988 (P.L. 100-360).

g. Catastrophic coverage premiums - \$1.5 billion-not distributed between aged and disabled enrollees are included in total.

h. Delivery of benefit checks normally due January 1993 occurred on Dec. 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 Dec. 31, 1992. These amounts are excluded from the premium income and general revenue income for calendar year 1993; see footnote d.

i. Includes the impact of the transfer to the HI trust fund of the SMI catastrophic coverage reserve fund on Mar. 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.

j. Delivery of benefit checks normally due January 1999 occurred on Dec. 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 d.

k. Benefit payments less monies transferred from the HI trust fund for home health agency costs, as provided for by P.L. 105-33.

SOURCES: 2001 Annual Report of the Board of Trustees of the Federal Supplementary Medical Insurance Fund, Table II.D2, analogous tables from earlier Annual Reports, and unpublished Treasury reports.

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

... = not applicable.

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**Table 8.B1—Hospital Insurance and Supplementary Medical Insurance: Aged persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1967–1998**

Type of coverage and service	1967	1975	1980	1990	1996	1997	1998	Average annual rate change (percent), 1967–1998
<b>Persons enrolled (thousands)</b>								
Hospital Insurance and/or Supplementary Medical Insurance....	19,521	22,790	25,515	30,948	33,424	33,630	33,802	1.9
Hospital Insurance .....	19,494	22,472	25,104	30,464	33,022	33,237	33,410	1.9
Supplementary Medical Insurance .....	17,893	21,945	24,680	29,685	31,984	32,164	32,308	2.1
<b>Persons served (thousands)</b>								
Hospital Insurance and/or Supplementary Medical Insurance....	7,154	12,032	16,271	24,809	27,263	26,587	25,931	4.5
Hospital Insurance .....	3,960	4,963	6,024	6,367	7,139	7,360	6,840	1.9
Inpatient hospital .....	3,601	4,913	5,951	5,906	6,091	6,220	6,074	1.8
Skilled nursing services .....	354	260	248	615	1,321	1,442	1,443	5.0
Home health services <sup>a</sup> .....	126	329	675	1,818	3,290	3,483	<sup>b</sup> 2,641	11.1
Supplementary Medical Insurance .....	6,523	11,762	16,099	24,687	27,113	26,237	25,605	4.8
Physicians' and other medical services .....	6,415	11,396	15,627	24,193	26,432	25,707	25,083	4.8
Outpatient services .....	1,511	3,768	6,629	14,055	17,875	18,093	18,150	9.0
Home health services <sup>a</sup> .....	118	161	302	38	45	47	1,339	8.7
<b>Persons served per 1,000 enrollees</b>								
Hospital Insurance and/or Supplementary Medical Insurance....	367	528	638	802	816	791	767	2.6
Hospital Insurance .....	203	221	240	209	216	221	205	0
Inpatient hospital .....	185	219	237	94	185	187	182	-0.1
Skilled nursing services .....	18	12	10	21	40	43	43	3.0
Home health services <sup>a</sup> .....	7	15	27	60	100	105	<sup>b</sup> 79	8.7
Supplementary Medical Insurance .....	365	536	652	832	848	816	793	2.7
Physicians' and other medical services .....	359	519	633	815	826	799	776	2.7
Outpatient services .....	77	172	269	474	559	563	562	7.1
Home health services <sup>a</sup> .....	7	7	12	1	1	2	41	6.3
<b>Amount reimbursed (millions of dollars)</b>								
Hospital Insurance and/or Supplementary Medical Insurance....	4,239	12,689	29,134	88,778	145,322	152,772	146,355	13.0
Hospital Insurance .....	2,967	9,209	20,353	54,244	95,404	101,027	90,511	12.5
Inpatient hospital .....	2,659	8,840	19,583	48,952	71,191	73,237	71,899	12.0
Skilled nursing services .....	274	233	331	1,886	9,157	10,831	11,074	13.6
Home health services <sup>a</sup> .....	26	136	440	3,406	15,056	16,960	<sup>b</sup> 7,538	24.5
Supplementary Medical Insurance .....	1,272	3,481	8,871	34,533	49,918	51,744	55,844	13.9
Physicians' and other medical services .....	1,224	3,050	7,361	27,379	36,865	38,206	38,685	12.6
Outpatient services .....	38	374	1,261	7,077	12,838	13,319	12,972	22.2
Home health services <sup>a</sup> .....	17	56	159	78	215	219	4,187	20.9
<b>Amount reimbursed per person served (dollars)</b>								
Hospital Insurance and/or Supplementary Medical Insurance....	592	1,055	1,791	3,578	5,330	5,746	5,644	8.1
Hospital Insurance .....	749	1,855	3,379	8,520	13,363	13,726	13,233	10.4
Inpatient hospital .....	738	1,799	3,291	8,289	11,688	11,774	11,837	10.0
Skilled nursing services .....	774	896	1,336	3,068	6,931	7,511	7,675	8.2
Home health services <sup>a</sup> .....	204	413	652	1,874	4,577	4,869	<sup>b</sup> 2,855	9.5
Supplementary Medical Insurance .....	195	296	545	1,399	1,841	1,972	2,181	8.7
Physicians' and other medical services .....	191	268	471	1,132	1,395	1,486	1,542	7.5
Outpatient services .....	25	99	190	503	718	736	715	12.3
Home health services <sup>a</sup> .....	145	347	526	2,033	4,815	4,606	3,126	11.2
<b>Amount reimbursed per enrollee (dollars)</b>								
Hospital Insurance and/or Supplementary Medical Insurance....	217	557	1,142	2,869	4,348	4,543	4,330	10.9
Hospital Insurance .....	152	410	811	1,781	2,899	3,040	2,709	10.4
Inpatient hospital .....	137	394	780	1,607	2,156	2,203	2,152	10.0
Skilled nursing services .....	14	11	13	62	277	326	331	11.5
Home health services <sup>a</sup> .....	1	6	18	112	456	510	<sup>b</sup> 226	23.5
Supplementary Medical Insurance .....	71	159	356	1,163	1,561	1,609	1,728	11.6
Physicians' and other medical services .....	69	139	298	922	1,153	1,188	1,197	10.3
Outpatient services .....	2	17	51	238	401	414	402	20.1
Home health services <sup>a</sup> .....	1	2	6	3	7	7	130	18.3

a. The Balanced Budget Act of 1997, enacted on Aug. 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 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 have been almost exclusively provided by the HI program. For more information, refer to the 1998 HI and SMI trust fund reports.

b. Hospice utilization is combined in the Part A home health services.

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Data for persons enrolled as of July 1 are 100 percent and include Health Maintenance Organization (HMO) beneficiaries. Calendar year utilization for persons served and amounts reimbursed are inflated to represent 100 percent and exclude HMO services.

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## 8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B2—Hospital Insurance and Supplementary Medical Insurance: Disabled persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1974–1998**

Type of coverage and service	1974	1975	1980	1990	1996	1997	1998	Average annual rate change (percent), 1974–1998
<b>Persons enrolled (thousands)</b>								
Hospital Insurance and/ or Supplementary Medical Insurance...	1,928	2,168	3,171	3,255	4,640	4,815	5,023	4.4
Hospital Insurance .....	1,928	2,168	3,171	3,255	4,640	4,815	5,023	4.4
Supplementary Medical Insurance .....	1,745	1,959	2,883	2,943	4,155	4,296	4,472	4.4
<b>Persons served (thousands)</b>								
Hospital Insurance and/ or Supplementary Medical Insurance...	792	975	2,287	2,390	3,476	3,547	3,641	7.2
Hospital Insurance .....	400	475	659	680	964	986	961	4.1
Inpatient hospital .....	397	472	628	644	868	887	899	3.8
Skilled nursing services .....	8	8	23	23	63	73	75	10.7
Home health services <sup>a</sup> .....	15	22	105	122	293	304	<sup>b</sup> 225	13.1
Supplementary Medical Insurance .....	740	924	2,263	2,365	3,442	3,499	3,596	7.5
Physicians' and other medical services .....	691	865	2,159	2,249	3,315	3,363	3,452	7.6
Outpatient services .....	296	399	1,415	1,496	2,407	2,510	2,619	10.4
Home health services <sup>a</sup> .....	9	13	<sup>c</sup>	<sup>c</sup>	<sup>c</sup>	<sup>c</sup>	131	12.9
<b>Persons served per 1,000 enrollees</b>								
Hospital Insurance and/ or Supplementary Medical Insurance...	411	450	721	734	749	737	725	2.6
Hospital Insurance .....	208	219	208	209	208	205	191	-0.4
Inpatient hospital .....	206	218	198	198	187	184	179	-0.6
Skilled nursing services .....	4	4	7	7	14	15	15	6.2
Home health services <sup>a</sup> .....	8	10	33	38	63	63	<sup>b</sup> 49	8.6
Supplementary Medical Insurance .....	424	471	785	804	828	814	804	3.0
Physicians' and other medical services .....	396	442	749	764	798	783	772	3.1
Outpatient services .....	170	204	491	508	579	584	586	5.8
Home health services <sup>a</sup> .....	5	7	<sup>c</sup>	<sup>c</sup>	<sup>c</sup>	<sup>c</sup>	29	8.3
<b>Amount reimbursed (millions of dollars)</b>								
Hospital Insurance and/ or Supplementary Medical Insurance...	1,049	1,509	10,364	11,239	22,647	23,796	23,855	15.3
Hospital Insurance .....	694	987	6,253	6,694	13,790	14,383	13,624	14.5
Inpatient hospital .....	681	968	5,936	6,346	11,848	12,177	12,342	14.1
Skilled nursing services .....	7	9	143	85	464	564	603	22.5
Home health services <sup>a</sup> .....	6	10	173	264	1,478	1,641	<sup>b</sup> 678	28.4
Supplementary Medical Insurance .....	355	522	4,111	4,545	8,858	9,414	10,231	16.5
Physicians' and other medical services .....	206	295	2,623	2,831	5,125	5,474	5,749	16.3
Outpatient services .....	145	221	1,488	1,714	3,733	3,940	3,994	16.3
Home health services <sup>a</sup> .....	3	5	<sup>c</sup>	<sup>c</sup>	<sup>c</sup>	<sup>c</sup>	488	<sup>c</sup>
<b>Amount reimbursed per person served (dollars)</b>								
Hospital Insurance and/ or Supplementary Medical Insurance...	1,324	1,548	4,531	4,703	6,515	6,710	6,552	7.5
Hospital Insurance .....	1,735	2,077	9,482	9,847	14,306	14,582	14,170	10.0
Inpatient hospital .....	1,714	2,051	9,455	9,849	13,649	13,731	13,722	9.9
Skilled nursing services .....	936	1,049	6,107	3,702	7,336	7,785	8,066	10.3
Home health services <sup>a</sup> .....	399	478	1,645	2,156	5,052	5,395	<sup>b</sup> 3,014	9.6
Supplementary Medical Insurance .....	479	565	1,817	1,922	2,574	2,691	2,845	8.4
Physicians' and other medical services .....	298	341	1,215	1,259	1,546	1,628	1,666	8.1
Outpatient services .....	490	554	1,051	1,146	1,551	1,569	1,525	5.3
Home health services <sup>a</sup> .....	345	420	230	517	1,235	1,046	3,732	11.4
<b>Amount reimbursed per enrollee (dollars)</b>								
Hospital Insurance and/ or Supplementary Medical Insurance...	544	696	3,268	3,453	4,881	4,942	4,749	10.4
Hospital Insurance .....	360	455	1,972	2,057	2,972	2,987	2,712	9.6
Inpatient hospital .....	353	446	1,872	1,950	2,553	2,529	2,457	9.2
Skilled nursing services .....	4	4	45	26	100	117	120	16.7
Home health services <sup>a</sup> .....	3	5	55	81	319	341	<sup>b</sup> 135	18.9
Supplementary Medical Insurance .....	208	266	1,426	1,544	2,132	2,191	2,288	11.5
Physicians' and other medical services .....	118	151	910	962	1,233	1,247	1,285	11.5
Outpatient services .....	83	113	516	582	898	917	893	11.4
Home health services <sup>a</sup> .....	2	3	<sup>c</sup>	<sup>c</sup>	<sup>c</sup>	<sup>c</sup>	109	19.9

a. The Balanced Budget Act of 1997, enacted on Aug. 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 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 have been almost exclusively provided by the HI program. For more information, refer to the 1998 HI and SMI trust fund reports.

b. Hospice utilization is combined in the Part A home health services.

c. Sample population too small to yield valid calculated results.

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Data for persons enrolled as of July 1 are 100 percent and include Health Maintenance Organization (HMO) beneficiaries. Calendar year utilization for persons served and amounts reimbursed are inflated to represent 100 percent and exclude HMO services.

CONTACT: Maria Diacogiannis (410) 786-0178.



**Table 8.B3—Hospital Insurance and Supplementary Medical Insurance: Number of enrollees, by census division and state or other area, July 1, 1980–2001, selected years (in thousands)**

Census division, state or area	1980	1990	1995	1997	1998	1999	2000	2001 <sup>a</sup>
	<i>Aged</i>							
All areas.....	25,515	30,948	33,142	33,630	33,802	33,929	34,253	34,442
United States <sup>b</sup> .....	25,027	30,350	32,492	32,958	33,120	33,240	33,549	33,724
New England.....	1,506	1,734	1,816	1,826	1,827	1,829	1,838	1,835
Connecticut.....	362	436	455	456	456	456	458	457
Maine.....	142	165	174	177	178	179	180	181
Massachusetts.....	715	795	825	828	827	826	829	826
New Hampshire.....	103	126	139	142	143	145	147	148
Rhode Island.....	125	145	149	149	148	148	148	147
Vermont.....	59	68	72	74	74	75	76	76
Middle Atlantic.....	4,496	5,084	5,267	5,262	5,259	5,264	5,282	5,273
New Jersey.....	851	1,006	1,058	1,063	1,064	1,065	1,070	1,069
New York.....	2,128	2,280	2,328	2,320	2,320	2,334	2,347	2,348
Pennsylvania.....	1,516	1,798	1,881	1,878	1,874	1,865	1,865	1,856
East North Central.....	4,462	5,224	5,500	5,523	5,527	5,526	5,552	5,558
Illinois.....	1,238	1,401	1,446	1,441	1,440	1,437	1,440	1,439
Indiana.....	579	685	725	730	732	732	736	738
Michigan.....	916	1,101	1,177	1,188	1,191	1,194	1,203	1,207
Ohio.....	1,162	1,387	1,471	1,476	1,476	1,474	1,480	1,479
Wisconsin.....	567	650	683	687	689	689	693	695
West North Central.....	2,186	2,424	2,510	2,514	2,515	2,513	2,519	2,522
Iowa.....	387	422	432	430	429	427	427	426
Kansas.....	304	337	348	348	348	347	347	346
Minnesota.....	479	544	570	575	577	579	583	586
Missouri.....	639	706	733	734	735	734	736	737
Nebraska.....	205	221	228	228	227	227	227	227
North Dakota.....	81	91	94	93	93	93	93	93
South Dakota.....	91	102	106	106	106	106	106	107
South Atlantic.....	4,179	5,536	6,091	6,250	6,307	6,330	6,410	6,471
Delaware.....	59	80	90	93	95	96	97	99
District of Columbia.....	71	71	70	67	67	66	66	65
Florida.....	1,579	2,174	2,396	2,460	2,477	2,473	2,493	2,509
Georgia.....	499	636	700	721	730	736	750	760
Maryland.....	381	496	542	554	559	562	570	576
North Carolina.....	588	786	878	906	917	925	939	951
South Carolina.....	279	383	428	443	449	454	463	470
Virginia.....	490	645	714	733	742	748	761	771
West Virginia.....	233	264	274	273	272	270	271	270
East South Central.....	1,613	1,887	2,000	2,028	2,035	2,041	2,060	2,071
Alabama.....	428	508	541	549	551	553	558	561
Kentucky.....	402	459	482	486	487	488	491	492
Mississippi.....	280	313	325	328	328	328	330	331
Tennessee.....	503	607	652	665	669	672	681	687
West South Central.....	2,363	2,880	3,120	3,187	3,211	3,232	3,274	3,297
Arkansas.....	303	343	356	358	357	358	359	359
Louisiana.....	380	460	488	494	495	495	498	498
Oklahoma.....	361	412	432	434	435	436	438	439
Texas.....	1,318	1,665	1,845	1,901	1,924	1,943	1,979	2,001
Mountain.....	1,043	1,490	1,726	1,806	1,839	1,863	1,906	1,943
Arizona.....	295	456	536	562	573	577	591	602
Colorado.....	244	324	367	383	389	395	403	409
Idaho.....	95	121	134	138	140	142	144	147
Montana.....	85	106	114	116	117	118	119	120
Nevada.....	65	128	172	188	195	200	209	218
New Mexico.....	114	160	182	190	193	196	200	203
Utah.....	108	147	168	174	176	178	183	186
Wyoming.....	38	47	54	55	56	57	57	58
Pacific.....	3,157	4,082	4,444	4,548	4,586	4,630	4,697	4,742
Alaska.....	11	22	28	31	32	33	35	36
California.....	2,346	2,990	3,241	3,320	3,348	3,385	3,436	3,470
Hawaii.....	74	118	138	144	146	148	151	153
Oregon.....	300	390	422	426	428	429	432	435
Washington.....	426	562	614	627	632	635	643	648
Residence unknown.....	22	10	18	15	14	12	11	11
Outlying areas.....	270	344	383	398	404	404	420	430
Puerto Rico.....	263	337	367	381	387	393	401	410
Virgin Islands.....	4	6	8	8	8	9	9	10
Other.....	3	1	8	9	9	2	10	10
Foreign countries.....	217	254	268	275	277	280	284	288

See footnotes at end of table.

## 8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B3—Hospital Insurance and Supplementary Medical Insurance: Number of enrollees, by census division and state or other area, July 1, 1980–2001, selected years (in thousands)—Continued**

Census division, state or area	1980	1990	1995	1997	1998	1999	2000	2001 <sup>a</sup>
	<i>Disabled</i>							
All areas .....	2,963	3,255	4,393	4,815	5,023	5,212	5,367	5,540
United States <sup>b</sup> .....	2,863	3,148	4,266	4,675	4,878	5,062	5,208	5,382
New England .....	141	156	228	254	266	277	285	294
Connecticut .....	31	33	47	51	54	56	58	59
Maine .....	16	18	27	31	33	35	36	38
Massachusetts .....	64	72	108	119	124	128	131	134
New Hampshire .....	9	11	17	20	21	22	23	24
Rhode Island .....	14	14	19	21	22	23	24	25
Vermont .....	7	7	10	12	12	13	13	14
Middle Atlantic .....	493	473	603	657	685	713	731	751
New Jersey .....	91	86	110	119	124	130	133	137
New York .....	237	229	302	331	346	360	368	376
Pennsylvania .....	165	158	190	206	215	223	230	238
East North Central .....	486	561	715	758	782	807	823	842
Illinois .....	113	132	172	181	186	192	195	199
Indiana .....	63	77	99	105	109	113	117	120
Michigan .....	118	132	170	181	188	195	200	206
Ohio .....	141	156	196	207	213	219	221	225
Wisconsin .....	50	64	79	83	86	88	90	92
West North Central .....	180	211	280	305	317	328	338	349
Iowa .....	29	34	43	46	47	49	50	51
Kansas .....	22	26	35	39	41	42	43	45
Minnesota .....	35	44	60	64	67	69	72	74
Missouri .....	67	75	100	111	115	120	124	129
Nebraska .....	14	16	22	24	24	25	26	27
North Dakota .....	6	7	9	10	10	10	10	10
South Dakota .....	7	8	11	12	12	13	13	13
South Atlantic .....	545	607	834	940	990	1,034	1,075	1,119
Delaware .....	7	8	11	12	13	14	15	15
District of Columbia .....	8	7	8	9	9	9	10	10
Florida .....	147	165	232	267	284	298	311	326
Georgia .....	88	96	134	148	155	161	166	172
Maryland .....	41	46	60	66	69	72	75	78
North Carolina .....	91	106	149	168	178	186	194	202
South Carolina .....	51	59	81	92	96	101	105	109
Virginia .....	68	77	105	117	122	128	132	138
West Virginia .....	43	44	55	60	63	65	67	69
East South Central .....	246	287	397	441	462	480	495	516
Alabama .....	63	74	101	113	118	123	127	133
Kentucky .....	62	75	105	117	123	128	132	137
Mississippi .....	46	53	72	80	83	86	88	92
Tennessee .....	76	85	119	132	138	143	148	154
West South Central .....	288	317	452	497	514	528	539	554
Arkansas .....	45	48	67	73	76	78	80	82
Louisiana .....	63	71	93	99	101	103	104	106
Oklahoma .....	41	39	56	63	65	67	69	71
Texas .....	139	159	236	262	272	280	286	295
Mountain .....	112	148	228	255	267	276	284	293
Arizona .....	34	42	66	74	78	81	84	88
Colorado .....	24	34	54	60	62	64	65	66
Idaho .....	9	11	16	18	19	20	21	22
Montana .....	9	12	16	17	17	18	18	18
Nevada .....	8	13	22	26	28	29	30	32
New Mexico .....	15	19	28	31	32	33	34	35
Utah .....	9	13	20	21	22	23	24	24
Wyoming .....	3	4	7	7	8	8	8	8
Pacific .....	367	388	529	569	593	618	637	658
Alaska .....	2	3	5	6	6	7	7	8
California .....	284	289	392	418	435	452	465	479
Hawaii .....	7	9	11	12	13	15	15	15
Oregon .....	31	34	47	51	53	55	57	60
Washington .....	43	53	74	82	86	90	93	96
Residence unknown .....	4	2	1	1	1	1	1	1
Outlying areas .....	88	93	112	124	130	134	139	142
Puerto Rico .....	88	92	110	122	127	132	136	139
Virgin Islands .....	...	1	1	1	1	1	1	1
Other .....	...	...	...	1	2	1	2	2
Foreign countries .....	12	14	14	15	15	14	14	15

a. Preliminary data as of December 2001.

b. Represents beneficiaries of 50 states, District of Columbia and those with residence unknown.

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: ... = not available.

CONTACT: Maria Diacogianis (410) 786-0178.

**Table 8.B4—Hospital Insurance and Supplementary Medical Insurance: Number of persons aged 65 or older enrolled, by age, sex, and race, July 1, 1980–2001, selected years (in thousands)**

Age, sex, and race	1980	1985	1990	1995	1998	1999	2000	2001 <sup>a</sup>
<b>Hospital and/or Supplementary Medical Insurance</b>								
Total .....	25,515	28,176	30,948	33,142	33,802	33,929	34,252	34,442
Age								
65–69 .....	8,459	8,956	9,695	9,517	9,184	9,077	9,167	9,185
70–74 .....	6,756	7,441	7,951	8,756	8,725	8,656	8,609	8,561
75–79 .....	4,809	5,453	6,058	6,563	7,055	7,232	7,285	7,284
80–84 .....	3,081	3,463	3,957	4,470	4,707	4,735	4,870	5,022
85 or older .....	2,410	2,861	3,286	3,837	4,130	4,229	4,322	4,391
Sex								
Men .....	10,268	11,282	12,416	13,434	13,806	13,900	14,112	14,254
Women .....	15,247	16,894	18,532	19,708	19,996	20,029	20,141	20,188
Race								
White .....	22,534	24,745	26,855	29,011	29,288	29,311	29,757	29,847
All other races .....	2,257	2,585	3,114	3,253	3,259	4,431	4,403	4,502
Unknown .....	724	846	979	878	1,255	187	92	93
<b>Hospital Insurance</b>								
Total .....	25,104	27,683	30,464	32,742	33,410	33,516	33,833	34,028
Age								
65–69 .....	8,302	8,818	9,565	9,411	9,093	8,984	9,074	9,097
70–74 .....	6,592	7,292	7,829	8,652	8,626	8,552	8,505	8,460
75–79 .....	4,731	5,315	5,947	6,483	6,968	7,138	7,189	7,188
80–84 .....	3,072	3,403	3,872	4,409	4,649	4,674	4,806	4,956
85 or older .....	2,407	2,854	3,252	3,787	4,074	4,168	4,259	4,327
Sex								
Men .....	10,156	11,146	12,280	13,310	13,684	13,770	13,979	14,122
Women .....	14,948	16,536	18,184	19,431	19,726	19,746	19,854	19,906
Race								
White .....	22,244	24,424	26,591	28,822	29,111	29,131	29,570	29,666
All other races .....	2,160	2,444	2,931	3,127	3,151	4,206	4,176	4,273
Unknown .....	699	815	942	792	1,148	179	87	88
<b>Supplementary Medical Insurance</b>								
Total .....	24,680	27,311	29,686	31,742	32,308	32,403	32,590	32,741
Age								
65–69 .....	8,156	8,607	9,008	8,830	10,205	8,349	8,330	8,335
70–74 .....	6,570	7,277	7,740	8,430	6,649	8,315	8,256	8,198
75–79 .....	4,684	5,333	5,942	6,431	6,881	7,043	7,088	7,082
80–84 .....	2,981	3,381	3,879	4,392	4,627	4,651	4,782	4,926
85 or older .....	2,289	2,712	3,118	3,659	3,946	4,042	4,134	4,201
Sex								
Men .....	9,868	10,852	11,758	12,694	13,007	13,079	13,205	13,326
Women .....	14,813	16,459	17,927	19,048	19,302	19,324	19,384	19,415
Race								
White .....	21,876	24,060	25,849	27,899	28,115	28,115	28,432	28,496
All other races .....	2,114	2,441	2,910	3,028	3,020	4,126	4,086	4,173
Unknown .....	691	810	927	815	1,173	162	71	72

a. Data for 2001 are preliminary as of December 2001.

SOURCE: Centers for Medicare &amp; Medicaid Services.

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## 8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B5—Hospital Insurance and Supplementary Medical Insurance: Number of disabled persons and persons with end stage renal disease under age 65 enrolled, by age, sex, and race, July 1, 1980–2001, selected years**

Age, sex, and race	1980		1990		1999		2000		2001 <sup>a</sup>	
	Total	End stage renal disease only	Total	End stage renal disease only	Total	End stage renal disease only	Total	End stage renal disease only	Total	End stage renal disease only
<b>Hospital Insurance and/or Supplementary Medical Insurance</b>										
Total .....	2,963,175	28,334	3,255,007	64,692	5,211,634	67,058	5,367,151	73,890	5,539,682	75,392
Age										
Under 35 .....	371,204	8,773	483,265	16,603	542,507	12,792	522,321	13,255	516,477	13,339
35–44 .....	369,460	5,188	654,957	14,159	1,117,360	14,222	1,129,288	15,084	1,130,897	15,048
45–54 .....	657,486	6,977	741,200	15,800	1,539,116	20,337	1,627,238	22,647	1,719,177	23,364
55–64 .....	1,565,025	7,396	1,375,585	18,130	2,012,651	19,707	2,088,304	22,904	2,173,131	23,641
Sex										
Men .....	1,870,558	14,547	2,042,944	33,647	2,959,769	35,798	3,014,107	40,062	3,078,079	40,755
Women .....	1,092,617	13,787	1,212,063	31,045	2,251,865	31,260	2,353,044	33,828	2,461,603	34,637
Race										
White .....	2,422,253	19,232	2,480,767	35,638	3,734,108	28,574	3,989,357	35,636	4,094,871	34,808
All other races .....	486,677	7,907	712,315	26,477	1,445,265	37,603	1,362,457	37,820	1,427,404	40,273
Unknown .....	54,245	1,195	61,925	2,577	32,261	881	15,337	434	17,407	311
<b>Hospital Insurance</b>										
Total .....	2,963,156	28,334	3,254,983	64,677	5,211,162	67,056	5,366,598	73,890	5,539,385	75,392
Age										
Under 35 .....	371,199	8,773	483,262	16,601	542,400	12,792	522,123	13,255	516,415	13,339
35–44 .....	369,458	5,188	654,953	14,157	1,117,262	14,222	1,129,170	15,084	1,130,833	15,048
45–54 .....	657,483	6,977	741,193	15,794	1,539,006	20,337	1,627,107	22,647	1,719,074	23,364
55–64 .....	1,565,016	7,396	1,375,575	18,125	2,012,494	19,705	2,088,198	22,904	2,173,063	23,641
Sex										
Men .....	1,870,543	14,547	2,042,929	33,639	2,959,498	35,797	3,013,803	40,062	3,077,915	40,755
Women .....	1,092,613	13,787	1,212,054	31,038	2,251,664	31,259	2,352,795	33,828	2,461,470	34,637
Race										
White .....	2,422,239	19,232	2,480,754	35,631	3,733,764	28,574	3,988,957	35,636	4,094,660	34,808
All other races .....	486,672	7,907	712,304	26,469	1,445,139	37,601	1,362,305	37,820	1,427,319	40,273
Unknown .....	54,245	1,195	61,925	2,577	32,259	881	15,336	434	17,406	311
<b>Supplementary Medical Insurance</b>										
Total .....	2,719,226	27,046	2,943,480	58,912	4,637,088	62,633	4,769,804	68,800	4,927,237	69,905
Age										
Under 35 .....	339,665	8,294	441,640	14,782	485,600	11,830	466,869	12,159	462,745	12,220
35–44 .....	337,146	4,963	586,537	12,567	988,378	13,045	998,230	13,783	1,001,294	13,639
45–54 .....	596,287	6,683	666,257	14,559	1,346,050	18,899	1,421,904	20,961	1,505,087	21,554
55–64 .....	1,446,128	7,106	1,249,046	17,004	1,817,060	18,859	1,882,801	21,897	1,958,111	22,492
Sex										
Men .....	1,694,569	13,887	1,833,959	30,338	2,620,171	33,092	2,665,252	37,037	2,724,072	37,471
Women .....	1,024,657	13,159	1,109,521	28,574	2,016,917	29,541	2,104,552	31,763	2,203,165	32,434
Race										
White .....	2,218,176	18,458	2,236,781	32,347	3,315,154	26,658	3,535,008	33,154	3,630,825	32,285
All other races .....	449,753	7,446	650,121	24,240	1,293,562	35,173	1,221,836	35,256	1,281,368	37,341
Unknown .....	51,297	1,142	56,578	2,325	28,372	802	12,960	390	15,044	279

a. Preliminary data as of December 2001.

SOURCE: Centers for Medicare & Medicaid Services.

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**Table 8.B8—Hospital Insurance: Average covered charge per covered day of care in short-stay hospitals (1990–2001) and skilled nursing facilities (1975–2001), by census division and state or other area, selected years (in dollars)**

Census division, state or area <sup>a</sup>	Short-stay hospitals							
	1990	1994	1995	1996	1998	1999	2000	2001 <sup>b</sup>
All areas <sup>c</sup> .....	1,090	1,753	1,908	2,067	2,370	2,533	2,762	3,069
United States <sup>d</sup> .....	1,081	1,763	1,920	2,081	2,388	2,554	2,787	3,097
New England.....	988	1,567	1,763	1,915	2,149	2,284	2,436	2,601
Connecticut .....	1,177	1,801	2,013	2,207	2,442	2,522	2,608	2,716
Maine.....	927	1,460	1,645	1,826	2,005	2,140	2,328	2,481
Massachusetts .....	942	1,513	1,705	1,830	2,091	2,251	2,429	2,590
New Hampshire.....	1,022	1,543	1,699	1,847	2,061	2,269	2,480	2,688
Rhode Island.....	851	1,413	1,638	1,818	2,046	2,172	2,316	2,645
Vermont.....	923	1,456	1,580	1,646	1,849	1,945	1,995	2,138
Middle Atlantic.....	943	1,550	1,704	1,849	2,272	2,480	2,743	3,156
New Jersey.....	725	1,639	1,865	2,093	2,726	3,154	3,757	4,758
New York.....	836	1,252	1,366	1,477	1,843	1,971	2,116	2,316
Pennsylvania.....	1,236	1,925	2,109	2,251	2,628	2,806	3,003	3,323
East North Central.....	1,097	1,721	1,866	2,025	2,225	2,377	2,550	2,776
Illinois.....	1,202	1,951	2,126	2,340	2,614	2,806	3,017	3,268
Indiana.....	997	1,575	1,713	1,830	2,006	2,108	2,271	2,458
Michigan.....	1,193	1,756	1,881	2,014	2,178	2,292	2,451	2,618
Ohio.....	1,030	1,599	1,730	1,872	2,050	2,233	2,360	2,595
Wisconsin.....	933	1,535	1,690	1,856	2,081	2,201	2,424	2,736
West North Central.....	1,052	1,677	1,831	1,988	2,235	2,400	2,638	2,910
Iowa.....	902	1,453	1,573	1,726	1,831	1,953	2,124	2,339
Kansas.....	1,093	1,752	1,957	2,105	2,203	2,377	2,589	2,842
Minnesota.....	1,132	1,794	1,938	2,108	2,457	2,651	2,913	3,200
Missouri.....	1,108	1,755	1,922	2,076	2,381	2,551	2,783	3,056
Nebraska.....	1,043	1,710	1,850	2,012	2,386	2,600	3,007	3,403
North Dakota.....	937	1,367	1,509	1,630	1,898	2,024	2,180	2,374
South Dakota.....	915	1,396	1,518	1,649	1,806	1,919	2,167	2,415
South Atlantic.....	1,106	1,722	1,876	2,023	2,277	2,430	2,637	2,909
Delaware.....	1,191	1,759	1,831	1,882	1,926	1,948	1,971	2,139
District of Columbia.....	1,374	1,960	2,129	2,267	3,061	3,178	3,331	3,531
Florida.....	1,360	2,124	2,351	2,567	2,902	3,147	3,439	3,820
Georgia.....	1,081	1,594	1,744	1,881	2,144	2,323	2,527	2,751
Maryland.....	813	1,256	1,365	1,504	1,527	1,565	1,608	1,702
North Carolina.....	932	1,502	1,603	1,688	1,896	2,004	2,175	2,391
South Carolina.....	1,021	1,675	1,818	1,950	2,185	2,362	2,611	2,924
Virginia.....	1,022	1,606	1,732	1,877	2,115	2,257	2,432	2,664
West Virginia.....	1,009	1,378	1,472	1,585	1,620	1,681	1,821	1,972
East South Central.....	1,019	1,573	1,718	1,858	2,077	2,248	2,451	2,660
Alabama.....	1,176	1,877	2,054	2,222	2,499	2,677	2,914	3,195
Kentucky.....	967	1,466	1,630	1,762	1,972	2,093	2,269	2,441
Mississippi.....	865	1,306	1,437	1,546	1,678	1,852	2,017	2,207
Tennessee.....	1,012	1,546	1,662	1,820	2,062	2,262	2,479	2,665
West South Central.....	1,138	1,783	1,937	2,098	2,344	2,520	2,767	3,086
Arkansas.....	923	1,382	1,511	1,649	1,776	1,974	2,194	2,459
Louisiana.....	1,180	1,794	1,926	2,056	2,275	2,451	2,724	3,013
Oklahoma.....	997	1,453	1,620	1,772	1,988	2,146	2,335	2,551
Texas.....	1,212	1,953	2,118	2,296	2,573	2,749	3,008	3,356
Mountain.....	1,350	2,181	2,321	2,549	2,878	3,016	3,279	3,624
Arizona.....	1,442	2,356	2,617	2,880	3,382	3,537	3,885	4,220
Colorado.....	1,308	2,225	2,240	2,434	2,673	3,047	3,392	3,795
Idaho.....	1,140	1,789	1,951	2,115	2,201	2,328	2,471	2,717
Montana.....	1,036	1,610	1,742	1,877	1,947	2,046	2,233	2,499
Nevada.....	2,031	2,967	3,253	3,492	4,017	3,973	4,320	4,737
New Mexico.....	1,140	1,766	1,913	2,081	2,254	2,410	2,533	2,812
Utah.....	1,283	1,990	2,069	2,290	2,556	2,721	2,871	3,104
Wyoming.....	1,094	1,765	1,985	2,110	2,122	2,257	2,373	2,613
Pacific.....	1,651	2,708	2,877	3,074	3,574	3,818	4,228	4,748
Alaska.....	1,470	2,032	2,385	2,434	2,701	2,817	3,144	3,404
California.....	1,794	2,960	3,156	3,371	3,931	4,228	4,701	5,313
Hawaii.....	1,224	2,242	2,319	2,484	2,803	2,941	2,991	3,120
Oregon.....	1,275	1,905	1,987	2,135	2,358	2,481	2,717	2,964
Washington.....	1,162	1,816	1,924	2,020	2,237	2,448	2,708	2,996
Outlying areas.....	510	686	739	794	832	894	947	988
Puerto Rico.....	505	683	736	793	831	893	946	985
Virgin Islands.....	746	854	843	831	870	922	1,007	1,124

See footnotes at end of table.

## 8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B8—Hospital Insurance: Average covered charge per covered day of care in short-stay hospitals (1990–2001) and skilled nursing facilities (1975–2001), by census division and state or other area, selected years (in dollars)—Continued**

Census division, state or area <sup>a</sup>	Skilled nursing facilities							
	1975	1980	1990	1995	1998	1999	2000	2001 <sup>b</sup>
All areas <sup>c</sup> .....	43	70	193	402	498	424	413	422
United States <sup>d</sup> .....	43	70	193	402	498	424	413	422
New England.....	50	77	172	347	448	395	391	402
Connecticut.....	35	51	165	314	412	364	362	376
Maine.....	52	100	274	308	381	361	387	416
Massachusetts.....	63	98	181	380	510	437	425	429
New Hampshire.....	41	86	218	412	458	386	392	424
Rhode Island.....	43	59	129	265	337	341	343	344
Vermont.....	38	62	155	266	327	330	330	324
Middle Atlantic.....	50	73	168	308	391	378	378	398
New Jersey.....	45	81	164	344	468	393	392	419
New York.....	61	80	168	240	297	325	337	358
Pennsylvania.....	40	65	170	373	492	443	430	439
East North Central.....	40	68	167	358	478	413	405	417
Illinois.....	37	77	215	421	555	493	493	505
Indiana.....	35	60	180	399	514	414	393	396
Michigan.....	45	60	130	270	396	357	357	376
Ohio.....	41	69	157	375	486	422	410	413
Wisconsin.....	35	64	149	315	399	320	319	335
West North Central.....	45	82	194	367	452	421	414	421
Iowa.....	46	84	269	406	473	443	440	462
Kansas.....	39	66	255	461	533	504	492	479
Minnesota.....	46	94	125	245	286	273	279	290
Missouri.....	47	95	263	465	599	547	531	537
Nebraska.....	41	71	205	338	432	413	426	436
North Dakota.....	43	49	118	221	303	330	343	346
South Dakota.....	33	61	160	270	306	286	285	298
South Atlantic.....	34	59	168	396	498	387	368	372
Delaware.....	31	50	132	328	417	327	317	329
District of Columbia.....	34	64	193	389	529	443	397	405
Florida.....	34	59	195	488	609	445	414	405
Georgia.....	34	71	146	346	437	344	320	317
Maryland.....	37	56	141	347	482	389	378	389
North Carolina.....	31	52	132	283	382	315	310	326
South Carolina.....	26	46	159	337	457	358	342	359
Virginia.....	42	68	168	331	416	350	347	363
West Virginia.....	36	64	171	364	474	417	400	406
East South Central.....	37	56	154	358	467	381	374	390
Alabama.....	33	38	143	353	426	346	335	343
Kentucky.....	36	58	151	352	461	381	381	382
Mississippi.....	45	105	160	377	538	425	409	441
Tennessee.....	41	70	162	358	467	390	383	406
West South Central.....	45	94	267	539	651	545	509	512
Arkansas.....	44	84	238	372	501	456	441	469
Louisiana.....	43	83	374	683	759	725	646	635
Oklahoma.....	60	145	312	563	665	537	538	536
Texas.....	43	78	238	542	657	527	485	487
Mountain.....	38	64	226	486	568	463	442	438
Arizona.....	41	71	236	549	655	532	493	461
Colorado.....	42	73	266	538	588	480	459	463
Idaho.....	27	46	152	381	457	373	355	380
Montana.....	30	44	123	291	369	354	351	359
Nevada.....	37	66	232	569	744	558	577	514
New Mexico.....	57	122	267	488	582	528	497	482
Utah.....	36	75	266	473	545	425	409	424
Wyoming.....	36	49	208	379	433	392	381	390
Pacific.....	45	81	269	576	667	550	542	538
Alaska.....	68	115	283	437	634	760	723	696
California.....	46	87	287	629	728	603	594	587
Hawaii.....	49	83	217	467	508	434	454	463
Oregon.....	40	63	207	421	465	376	372	369
Washington.....	34	62	196	412	465	379	381	391
Outlying areas.....								
Puerto Rico.....	51	97	202	261	312	344	383	378
Virgin Islands.....	43	104	171	370	474	315	420	507

a. Geographic distribution reflects the beneficiaries' area of residence.

b. Preliminary data.

c. Excludes claims for persons residing in foreign countries.

d. Includes claims for persons whose place of residence is unknown.

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Data for 1975 and 1980 are based on bills approved in each year and recorded in the Centers for Medicare & Medicaid Services before Dec. 29, 1995. Data from 1990–2001 are based on bills incurred in each year and recorded before Dec. 29, 2001. Includes data for services rendered to both aged and disabled persons.

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**Table 8.B8.1—Hospital Insurance: Short-stay hospital discharges, by state or other area, selected fiscal years 1990–2001**

State or area	1990	1993	1994	1995	1996	1997	1998	1999	2000	2001
Total .....	10,472,587	11,122,070	11,503,279	11,680,874	11,749,394	11,952,088	11,912,079	11,659,885	11,778,705	12,093,252
Alabama .....	226,359	238,366	252,428	255,013	258,908	265,029	266,603	266,541	274,518	280,590
Alaska .....	6,491	7,446	7,954	8,635	9,593	9,917	10,633	11,031	11,684	11,446
Arizona .....	140,069	134,305	134,786	139,564	146,446	150,597	150,190	128,363	135,143	143,635
Arkansas .....	143,363	141,228	152,452	152,516	154,626	157,920	160,379	160,880	164,310	164,998
California .....	834,829	868,175	879,227	875,926	889,323	901,018	921,068	780,295	740,564	749,315
Colorado .....	98,262	102,789	104,733	105,216	102,450	103,735	97,479	100,648	101,486	100,306
Connecticut .....	114,938	134,264	138,988	141,765	141,031	143,071	133,672	125,115	124,951	134,337
Delaware .....	26,125	29,352	30,322	30,336	30,051	30,632	30,738	33,287	34,049	36,135
District of Columbia .....	36,062	37,612	39,306	39,526	38,661	38,508	38,661	38,693	39,112	39,832
Florida .....	579,368	696,322	734,297	742,862	739,066	743,556	758,714	736,958	765,130	818,566
Georgia .....	274,957	298,054	312,133	316,301	323,093	327,839	320,774	311,998	324,286	332,147
Hawaii .....	26,340	29,107	31,077	32,526	32,939	34,795	33,331	26,347	26,146	25,823
Idaho .....	31,559	33,806	35,923	36,327	39,236	41,066	42,451	43,353	44,027	42,877
Illinois .....	460,926	517,848	531,390	533,238	524,936	538,476	531,184	539,314	556,122	572,988
Indiana .....	254,404	267,841	278,602	276,601	278,303	287,615	289,743	289,693	297,851	303,603
Iowa .....	141,191	144,717	146,352	146,448	148,724	151,815	154,152	155,497	159,451	161,489
Kansas .....	117,017	118,000	121,106	120,593	122,917	125,481	127,045	126,920	128,024	129,087
Kentucky .....	199,042	206,131	219,042	222,162	224,322	231,081	231,352	237,553	243,886	250,140
Louisiana .....	213,819	218,393	228,770	234,663	235,574	237,390	232,942	223,794	237,154	241,159
Maine .....	54,963	61,205	62,904	63,013	64,361	66,278	67,895	68,128	69,030	68,101
Maryland .....	179,835	198,735	206,778	214,989	211,265	204,988	195,489	199,012	208,038	232,783
Massachusetts .....	286,332	315,864	314,727	310,455	299,734	293,217	280,333	268,179	263,152	270,174
Michigan .....	366,349	391,061	416,096	435,455	443,753	457,401	456,972	452,461	452,367	464,644
Minnesota .....	170,808	180,515	175,255	178,018	181,315	187,164	192,488	194,935	200,918	207,371
Mississippi .....	142,662	148,737	157,119	162,934	170,698	181,599	185,149	181,575	183,952	183,763
Missouri .....	281,059	278,659	292,107	298,509	298,805	299,996	297,554	293,724	300,576	313,428
Montana .....	40,505	40,343	40,361	40,770	40,831	41,542	41,854	42,343	44,208	45,340
Nebraska .....	69,299	66,847	68,982	70,113	72,975	75,630	77,188	76,841	76,960	73,528
Nevada .....	37,478	43,473	47,397	49,254	52,175	54,509	55,150	48,369	49,613	51,336
New Hampshire .....	39,103	40,515	41,737	42,746	43,834	44,758	42,918	42,054	45,712	47,788
New Jersey .....	338,509	372,253	377,524	385,145	375,353	371,173	364,034	373,224	372,063	369,660
New Mexico .....	50,391	48,373	47,576	50,334	49,758	53,329	52,913	51,459	51,085	50,972
New York .....	723,060	760,012	779,941	797,453	796,965	798,611	787,116	777,269	750,793	755,774
North Carolina .....	267,370	294,295	312,494	336,173	353,297	369,667	385,533	395,004	406,700	410,096
North Dakota .....	37,543	36,848	37,344	37,014	36,807	38,272	38,332	38,847	39,672	38,501
Ohio .....	527,006	534,017	557,927	562,234	565,237	562,603	541,958	533,499	536,335	546,394
Oklahoma .....	155,100	147,665	154,360	156,239	158,966	163,842	166,068	170,592	176,021	177,976
Oregon .....	106,164	106,863	106,454	105,878	106,901	111,656	111,028	100,569	91,806	97,998
Pennsylvania .....	685,403	758,360	768,866	766,535	731,542	728,572	692,290	664,002	634,802	644,229
Rhode Island .....	46,578	50,324	49,186	49,740	50,739	50,498	46,484	39,625	38,489	39,332
South Carolina .....	112,232	136,991	148,028	156,060	163,200	171,889	184,188	194,344	204,038	211,697
South Dakota .....	38,175	40,508	41,963	41,714	42,916	44,101	44,350	44,846	45,239	44,831
Tennessee .....	290,371	294,103	304,007	310,335	318,600	324,380	324,831	318,793	327,423	338,706
Texas .....	603,621	619,068	650,174	671,734	689,627	721,006	732,255	725,166	742,628	793,936
Utah .....	39,963	41,057	42,199	43,819	45,418	44,513	45,698	48,898	53,003	54,902
Vermont .....	20,251	21,636	22,239	22,815	23,001	23,456	22,585	23,133	24,014	24,639
Virginia .....	240,165	251,676	267,259	271,620	274,285	285,721	286,752	289,195	295,790	302,676
Washington .....	157,942	162,571	163,092	157,146	160,146	158,264	152,867	148,620	153,660	160,704
West Virginia .....	111,305	117,610	122,868	124,293	125,954	131,334	131,473	134,483	134,585	134,496
Wisconsin .....	217,727	220,189	225,486	227,774	226,898	232,721	233,103	233,432	238,572	238,821
Wyoming .....	15,255	14,580	15,505	16,009	15,912	16,557	17,256	17,429	18,764	18,810
Outlying areas										
Puerto Rico .....	93,436	101,422	104,129	111,950	115,410	120,547	123,752	130,209	137,315	137,782
Virgin Islands .....	528	969	1,156	1,374	1,234	1,402	1,569	1,511	1,552	1,443
Unknown .....	978	970	1,151	1,012	1,283	1,351	1,543	1,835	1,936	2,148

SOURCE: Centers for Medicare &amp; Medicaid Services.

NOTE: Discharge data for fiscal year 2001 are preliminary as of December 2001.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B9—Supplementary Medical Insurance: Number of reimbursed bills, charges, and amount reimbursed, by type of service and type of beneficiary, 1993–2001 (in thousands)

Year claim incurred <sup>a</sup>	All services <sup>b</sup>	Physicians' services			Outpatient hospital services	Independent laboratory services	Home health services <sup>c</sup>	All other services
		Total	Surgical <sup>d</sup>	Medical <sup>d</sup>				
<b>Persons aged 65 or older</b>								
<i>Number of bills</i>								
1993	507,057	358,766	39,489	319,277	40,806	48,141	160	59,184
1994	554,498	397,244	42,750	354,494	44,476	52,813	178	59,787
1995	578,104	406,868	44,896	361,972	48,063	53,175	213	69,785
1996	590,301	411,789	46,171	365,618	50,578	52,417	248	75,269
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>e</sup> 486,296	429,299	45,496	383,803	51,498	<sup>e</sup>	5,499	<sup>e</sup>
2000	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>
2001	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>
<i>Allowed charges <sup>g</sup> (dollars)</i>								
1993	69,049,202	33,544,904	11,836,035	21,708,869	24,340,146	1,833,058	177,712	9,153,382
1994	76,875,292	37,701,474	12,860,574	24,840,900	28,538,148	1,848,456	220,762	8,566,452
1995	84,328,051	39,754,448	13,734,400	26,020,048	31,784,922	1,802,713	288,461	10,697,507
1996	88,172,944	39,483,559	13,164,645	26,318,914	34,957,678	1,634,474	319,712	11,777,521
1997	92,890,399	40,447,161	12,953,314	27,493,847	37,665,998	1,490,469	334,512	12,952,259
1998	101,809,496	41,696,171	12,061,669	29,634,502	38,736,941	1,333,092	6,041,312	14,001,980
1999	105,560,460	43,717,804	12,080,067	31,637,737	40,206,691	1,263,854	6,871,518	13,500,593
2000	114,135,596	48,261,747	12,358,986	35,902,761	44,056,275	1,578,371	5,522,898	14,716,305
2001	127,545,083	54,014,704	13,091,543	40,923,161	51,168,383	1,803,532	5,920,263	16,638,201
<i>Amount reimbursed <sup>h</sup> (dollars)</i>								
1993	41,833,141	26,286,845	9,316,794	16,970,051	8,085,005	1,786,035	125,662	5,549,594
1994	45,850,296	29,552,074	10,141,120	19,410,954	9,222,101	1,796,306	158,459	5,121,356
1995	49,727,844	31,117,478	10,833,812	20,283,666	10,090,443	1,751,375	206,605	6,561,942
1996	50,799,370	30,914,594	10,381,197	20,533,397	10,732,045	1,583,843	228,282	7,340,606
1997	52,433,972	31,683,366	10,218,613	21,464,753	11,207,218	1,440,437	233,968	7,868,983
1998	56,689,693	32,661,901	9,517,777	23,144,124	10,684,037	1,278,618	4,255,771	7,809,366
1999	58,183,159	34,381,359	9,523,625	24,857,734	10,356,189	1,208,731	4,835,419	7,401,461
2000	62,166,206	37,909,401	9,743,222	28,166,179	10,636,757	1,498,120	4,153,203	7,968,725
2001	69,420,739	42,472,068	10,351,499	32,120,569	12,515,905	1,707,844	3,818,245	8,906,677
<b>Disabled beneficiaries</b>								
<i>Number of bills</i>								
1993	59,885	38,755	3,374	35,381	8,907	5,286	...	6,937
1994	70,089	46,364	3,859	42,505	10,107	6,753	...	6,865
1995	77,224	49,829	4,261	45,568	11,152	7,758	...	8,485
1996	82,908	53,010	4,594	48,416	12,068	8,193	1	9,636
1997	86,071	55,260	4,773	50,487	12,415	8,073	...	10,323
1998	89,890	58,244	4,991	53,253	12,639	6,776	475	11,756
1999	<sup>e</sup> 72,288	59,281	5,042	54,239	12,413	<sup>e</sup>	594	<sup>e</sup>
2000	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>
2001	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>	<sup>f</sup>
<i>Allowed charges <sup>e</sup> (dollars)</i>								
1993	10,682,721	3,841,940	1,067,713	2,774,227	5,402,260	208,698	17	1,229,806
1994	12,561,705	4,659,625	1,231,332	3,428,293	6,543,340	247,559	63	1,111,118
1995	14,392,496	5,005,244	1,392,181	3,612,063	7,691,605	280,673	79	1,414,895
1996	15,901,655	5,168,502	1,401,285	3,767,217	8,681,707	284,031	194	1,767,221
1997	17,060,573	5,399,169	1,409,583	3,989,586	9,393,479	281,459	575	1,985,891
1998	18,732,088	5,822,296	1,401,045	4,421,251	9,546,986	252,465	717,283	2,391,058
1999	19,989,414	6,266,038	1,453,807	4,812,231	10,111,034	244,938	865,126	2,502,278
2000	21,961,089	7,109,711	1,526,798	5,582,913	11,048,518	290,804	722,269	2,789,787
2001	24,531,013	8,015,022	1,631,945	6,383,077	12,557,745	316,699	509,807	3,131,740

See footnotes at end of table.



8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B9—Supplementary Medical Insurance: Number of reimbursed bills, charges, and amount reimbursed, by type of service and type of beneficiary, 1993–2001 (in thousands)—Continued

Year claim incurred <sup>a</sup>	All services <sup>b</sup>	Physicians' services			Outpatient hospital services	Independent laboratory services	Home health services <sup>c</sup>	All other services
		Total	Surgical <sup>d</sup>	Medical <sup>d</sup>				
		<i>Amount reimbursed <sup>h</sup> (dollars)</i>						
1993 .....	6,500,250	2,927,647	831,483	2,096,164	2,521,823	204,857	16	845,907
1994 .....	7,458,910	3,547,187	959,659	2,587,528	2,887,012	242,791	46	781,874
1995 .....	8,408,210	3,791,215	1,088,310	2,702,905	3,331,621	275,955	52	1,009,367
1996 .....	9,099,514	3,908,937	1,095,977	2,812,960	3,652,617	278,816	142	1,259,002
1997 .....	9,592,010	4,093,502	1,103,074	2,990,428	3,839,312	276,056	454	1,382,686
1998 .....	10,437,639	4,405,354	1,095,140	3,310,214	3,776,415	246,255	495,986	1,513,629
1999 .....	10,968,036	4,756,445	1,135,375	3,621,070	3,836,007	238,605	593,674	1,543,305
2000 .....	11,874,526	5,396,707	1,192,908	4,203,799	3,986,289	282,806	523,616	1,685,108
2001 .....	13,235,243	6,101,360	1,278,008	4,823,352	4,512,502	307,831	450,459	1,863,091

- a. Period for which the claim incurred.
- b. Included in total, but not shown separately, are some bills and charges for which type of service is unknown.
- c. Due to Balanced Budget Act provisions, beginning in 1998 Part A now has a 100-visit limit and additional home health services will be billed under Part B.
- d. Where both medical and surgical charges are included on a single bill, the highest-priced service is the determining factor in classifying the bill.
- e. Data not available due to programmatic problems. Total for all services excluded independent laboratory services and all other services.
- f. Data on the number of bills are no longer available.
- g. Includes physician or supplier allowed charges as determined by the carrier and amounts actually billed by providers for outpatient hospital and home health services.
- h. 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.

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Includes only bills for which reimbursements were made by carriers or intermediaries and recorded in Centers for Medicare & Medicaid Services records before March 29, 2002.

... = less than 1,000.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B10—Supplementary Medical Insurance: Claims received by carriers and assignment rates, 1969–2001**

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

a. Represents the number of assigned claims as a percentage of claims received.

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Maria Diacogiannis (410) 786-0178.

**Table 8.B11—Supplementary Medical Insurance: Reasonable charge determination for claims assigned and unassigned for aged and disabled persons, 1971–2001**

Year	Claims approved		Charges before reduction	
	Number (thousands)	Percent reduced	Amount (millions)	Percent reduced
<b>Assigned claims</b>				
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
<b>Unassigned claims</b>				
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
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

a. Excludes Texas Blue-Shield plan for July–December 1981.

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Maria Diacogiannis (410) 768-0178.

Table 8.B12—Supplementary Medical Insurance: State buy-ins, by state or other area, selected years 1991–2002

State or area	1991	1994	1995	1996	1997	1998	1999	2000	2001	2002
All areas.....	3,640,121	4,443,683	4,705,625	4,914,789	5,008,860	5,109,228	5,273,573	5,425,048	5,615,326	5,810,613
Alabama.....	97,601	112,909	116,916	120,399	122,720	121,990	128,875	136,860	141,436	144,603
Alaska.....	4,539	5,853	6,193	6,659	6,835	7,093	7,799	8,486	8,832	9,324
Arizona.....	28,650	40,360	44,236	47,393	49,213	51,141	53,450	57,712	61,989	74,678
Arkansas.....	64,996	74,689	77,660	79,549	79,176	78,514	79,508	79,606	80,231	82,040
California.....	646,108	722,377	747,814	768,907	769,335	776,832	793,510	818,846	848,361	892,260
Colorado.....	36,470	43,747	46,660	49,561	50,749	52,175	53,964	55,325	56,934	57,987
Connecticut.....	23,535	40,812	48,047	50,226	50,668	51,335	52,134	53,141	55,933	60,083
Delaware.....	4,499	6,058	6,645	7,735	8,446	8,900	8,231	10,737	12,094	13,252
District of Columbia.....	12,791	13,436	14,152	14,195	14,482	14,582	13,181	14,233	14,621	15,065
Florida.....	196,992	258,382	271,430	290,838	304,791	313,744	324,172	342,109	358,642	369,092
Georgia.....	128,976	153,559	160,380	165,210	168,267	171,047	171,638	176,596	181,312	186,466
Hawaii.....	11,529	15,571	16,695	17,905	18,751	19,226	19,962	20,326	21,090	21,748
Idaho.....	9,127	12,062	12,931	13,835	14,296	14,909	15,868	17,081	18,550	19,725
Illinois.....	94,434	129,353	137,571	144,330	144,684	145,976	149,850	155,743	161,141	163,368
Indiana.....	60,297	74,598	76,460	75,930	76,846	81,184	82,901	87,543	91,311	95,553
Iowa.....	41,170	46,223	48,517	50,031	49,344	49,844	50,954	51,976	52,891	54,536
Kansas.....	26,960	32,485	34,708	37,064	37,486	39,008	40,365	41,217	42,126	43,123
Kentucky.....	76,456	92,555	97,978	103,705	105,188	106,537	111,789	117,697	118,641	122,096
Louisiana.....	87,570	106,915	112,090	114,917	114,482	115,031	116,602	117,179	117,867	120,478
Maine.....	22,176	27,447	29,453	31,063	32,168	33,006	35,211	36,946	38,161	39,575
Maryland.....	48,028	55,978	58,865	59,882	59,745	61,669	64,086	65,372	68,010	70,224
Massachusetts.....	89,163	118,683	125,859	132,575	132,874	138,796	143,779	152,587	160,198	164,510
Michigan.....	91,340	116,004	123,948	131,263	130,682	135,769	139,411	145,172	148,760	152,758
Minnesota.....	39,366	48,577	52,192	55,989	56,486	57,559	59,926	63,607	66,874	70,873
Mississippi.....	90,530	103,338	108,577	104,036	106,461	106,336	107,176	107,495	116,503	125,832
Missouri.....	55,116	68,610	72,659	76,883	79,847	81,841	85,329	88,343	91,244	93,512
Montana.....	10,058	10,206	11,031	11,638	11,825	11,882	12,274	12,828	13,120	13,359
Nebraska.....	11,358	15,357	16,146	16,986	17,321	18,029	19,064	20,520	21,121	22,120
Nevada.....	8,657	12,350	14,227	15,711	16,435	17,191	18,322	19,155	20,709	22,207
New Hampshire.....	3,807	4,982	5,405	5,878	6,119	6,295	6,875	7,434	8,866	9,231
New Jersey.....	95,795	113,658	122,923	131,292	135,109	137,598	143,024	146,705	149,303	151,644
New Mexico.....	22,246	29,268	29,855	32,346	33,472	34,411	36,023	37,330	39,275	41,263
New York.....	255,952	304,719	325,882	342,539	352,129	363,331	372,824	369,479	395,830	409,388
North Carolina.....	117,656	159,439	186,328	197,039	204,551	210,388	216,563	223,402	228,997	233,229
North Dakota.....	4,639	5,400	5,560	5,751	5,684	5,612	5,758	5,908	6,275	6,317
Ohio.....	112,598	151,070	164,044	172,316	178,365	180,172	181,407	171,139	176,602	182,821
Oklahoma.....	51,457	57,960	60,080	61,723	62,965	63,142	66,115	67,413	67,787	68,905
Oregon.....	28,537	39,558	43,642	47,600	49,553	51,392	55,896	59,169	62,910	66,255
Pennsylvania.....	127,519	156,701	162,788	170,790	173,142	179,295	198,492	206,468	215,351	218,691
Rhode Island.....	10,585	14,353	15,517	16,780	17,321	17,729	18,513	19,787	21,620	22,928
South Carolina.....	78,701	92,551	95,970	98,817	101,455	104,111	110,032	112,232	116,288	118,635
South Dakota.....	9,399	11,839	12,346	12,661	12,778	12,791	13,112	13,146	13,237	13,542
Tennessee.....	116,861	140,945	148,391	157,602	164,010	171,653	178,707	182,342	184,570	187,438
Texas.....	234,169	294,115	314,991	327,827	336,801	339,648	350,959	360,191	370,598	380,954
Utah.....	10,263	12,902	13,506	14,387	14,589	14,900	15,569	16,231	16,712	17,497
Vermont.....	8,223	11,240	12,428	12,863	13,048	13,197	13,598	13,754	14,296	14,650
Virginia.....	77,898	97,821	102,964	107,457	108,365	108,427	111,404	113,259	113,898	116,496
Washington.....	54,774	66,830	71,531	76,885	83,128	89,419	91,976	97,390	94,852	99,552
West Virginia.....	28,086	36,531	39,720	42,377	43,572	43,019	45,406	46,305	47,774	47,547
Wisconsin.....	67,516	77,472	75,247	78,661	76,109	74,429	74,681	74,101	73,875	75,179
Wyoming.....	3,505	4,726	5,265	5,548	5,781	5,963	6,183	6,444	6,746	7,087
Outlying areas										
Guam.....	443	600	669	710	682	650	583	417	385	339
Northern Mariana Islands.....	273	320	314	318	322	311	335	342	367	372
Virgin Islands.....	727	189	219	205	207	199	207	204	210	206

SOURCE: Centers for Medicare & 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 Supplementary Medical Insurance: Number of facilities and beds, by participating providers, December 1967–2001, selected years

Year	Hospitals			Skilled nursing facilities	Home health agencies	Clinical Laboratory Improvement Act/independent laboratories
	All hospitals	General <sup>a</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	<sup>b</sup> 156,117
1994	6,414	5,705	709	12,584	7,827	<sup>b</sup> 151,422
1995	6,376	5,694	682	13,452	8,447	<sup>b</sup> 156,511
1996	6,273	5,627	646	14,177	9,850	<sup>b</sup> 157,876
1997	6,293	5,639	654	14,860	10,807	<sup>b</sup> 164,054
1998	6,116	5,514	602	15,032	9,330	<sup>b</sup> 166,817
1999	5,985	5,415	570	14,913	7,857	<sup>b</sup> 171,018
2000	6,031	5,512	519	14,841	7,099	<sup>b</sup> 168,333
2001	6,002	5,508	494	14,755	6,813	<sup>b</sup> 173,807
<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	...	...
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	104,978	...	...

a. Includes short-stay and other long-stay hospitals.

b. Beginning in 1993, the data include all Clinical Laboratory Improvement Act facilities as of December of each year.

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: ... = not applicable.

CONTACT: Maria Diacogiannis (410) 786-0178.

Table 8.C2—Hospital Insurance: Number of participating hospitals and beds per 1,000 enrollees, by state or other area, December 2001

Census division, state or area	All hospitals		Short stay			Long stay	
	Hospitals	Beds	Hospitals	Beds	Beds per 1,000 enrollees <sup>a</sup>	Hospitals	Beds
All areas.....	6,002	968,761	4,429	844,051	21.3	1,573	124,710
United States.....	5,938	957,635	4,371	834,073	21.6	1,567	123,562
New England.....	266	44,405	180	33,481	15.8	86	10,924
Connecticut.....	46	10,781	32	8,763	17.0	14	2,018
Maine.....	41	4,134	30	3,565	16.4	11	569
Massachusetts.....	118	20,152	73	13,629	14.2	45	6,523
New Hampshire.....	30	3,366	22	2,800	16.3	8	566
Rhode Island.....	15	3,903	11	2,910	17.2	4	993
Vermont.....	16	2,069	12	1,814	20.2	4	255
Middle Atlantic.....	621	157,018	480	130,433	22.1	141	26,585
New Jersey.....	107	31,790	81	27,921	23.5	26	3,869
New York.....	261	81,393	210	67,044	25.7	51	14,349
Pennsylvania.....	253	43,835	189	35,468	17.0	64	8,367
East North Central.....	880	167,944	665	151,596	23.8	215	16,348
Illinois.....	217	48,722	174	45,324	28.0	43	3,398
Indiana.....	149	20,682	102	18,278	21.3	47	2,404
Michigan.....	172	31,000	132	27,524	19.5	40	3,476
Ohio.....	203	47,833	155	43,171	25.5	48	4,662
Wisconsin.....	139	19,707	102	17,299	22.0	37	2,408
West North Central.....	765	79,197	488	67,730	23.7	277	11,467
Iowa.....	120	12,071	84	10,914	22.9	36	1,157
Kansas.....	149	11,418	95	9,716	25.0	54	1,702
Minnesota.....	148	17,058	115	14,533	22.1	33	2,525
Missouri.....	137	24,869	101	22,568	26.2	36	2,301
Nebraska.....	95	7,041	31	4,663	18.4	64	2,378
North Dakota.....	51	3,382	22	2,544	24.8	29	838
South Dakota.....	65	3,358	40	2,792	23.3	25	566
South Atlantic.....	892	173,234	671	152,460	20.2	221	20,774
Delaware.....	11	2,328	5	1,892	16.6	6	436
District of Columbia.....	14	4,834	8	3,675	50.9	6	1,159
Florida.....	230	52,657	175	48,846	17.3	55	3,811
Georgia.....	179	25,984	131	22,521	24.4	48	3,463
Maryland.....	67	16,620	48	13,229	20.4	19	3,391
North Carolina.....	134	26,429	111	23,035	20.0	23	3,394
South Carolina.....	74	12,457	59	11,232	19.5	15	1,225
Virginia.....	118	22,403	90	19,507	21.7	28	2,896
West Virginia.....	65	9,522	44	8,523	25.1	21	999
East South Central.....	493	75,759	402	69,430	27.0	91	6,329
Alabama.....	124	20,446	106	18,965	27.5	18	1,481
Kentucky.....	115	17,431	85	15,256	24.5	30	2,175
Mississippi.....	106	12,916	96	12,397	29.4	10	519
Tennessee.....	148	24,966	115	22,812	27.2	33	2,154
West South Central.....	917	105,297	631	89,100	23.2	286	16,197
Arkansas.....	104	10,712	68	8,656	19.6	36	2,056
Louisiana.....	187	22,425	113	18,186	30.4	74	4,239
Oklahoma.....	143	14,510	103	12,896	25.3	40	1,614
Texas.....	483	57,650	347	49,362	21.6	136	8,288
Mountain.....	441	45,832	306	39,479	17.8	135	6,353
Arizona.....	83	11,983	66	10,829	15.8	17	1,154
Colorado.....	81	11,336	53	9,401	20.0	28	1,935
Idaho.....	47	2,851	23	2,337	13.9	24	514
Montana.....	61	2,881	37	2,461	17.9	24	420
Nevada.....	42	4,984	24	4,170	16.7	18	814
New Mexico.....	51	4,952	37	4,345	18.5	14	607
Utah.....	48	5,288	42	4,468	21.4	6	820
Wyoming.....	28	1,557	24	1,468	22.1	4	89
Pacific.....	663	108,949	548	100,364	19.1	115	8,585
Alaska.....	24	1,527	18	1,291	29.6	6	236
California.....	452	82,848	382	77,185	20.2	70	5,663
Hawaii.....	27	2,747	18	2,286	13.7	9	461
Oregon.....	62	7,959	52	7,513	15.3	10	446
Washington.....	98	13,868	78	12,089	16.4	20	1,779
Outlying areas.....	64	11,126	58	9,978	11.3	6	1,148
Puerto Rico.....	59	10,441	53	9,293	16.9	6	1,148
Virgin Islands.....	2	320	2	320	29.7	0	0
Other.....	3	365	3	365	1.1	0	0

a. Based on total number of persons enrolled in the Hospital Insurance program as of December 2001 (preliminary).

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Maria Diacogiannis (410) 786-0178.

## 8.C Medicare: Participating Facilities

**Table 8.C3—Hospital Insurance and Supplementary Medical Insurance: Number of participating skilled nursing facilities, home health agencies, independent laboratories, and end stage renal disease facilities, by census division and state or other area, December 2001**

Census division, state or area	Skilled nursing facilities			Home health agencies	Clinical Laboratory Improvement Act facilities	End stage renal diseases facilities
	Number	Beds	Beds per 1,000 enrollees <sup>a</sup>			
All areas.....	14,755	1,104,978	27.9	6,813	173,807	4,113
United States.....	14,746	1,104,595	28.3	6,764	172,803	4,073
New England.....	1,065	93,956	37.5	314	9,052	140
Connecticut.....	245	28,067	54.6	83	2,503	31
Maine.....	125	7,922	13.2	35	946	12
Massachusetts.....	488	42,012	43.8	126	3,623	68
New Hampshire.....	67	5,142	29.9	34	810	10
Rhode Island.....	97	7,681	45.3	23	752	13
Vermont.....	43	3,132	35.0	13	418	6
Middle Atlantic.....	1,777	219,612	37.3	548	21,809	542
New Jersey.....	363	37,682	31.7	53	4,892	92
New York.....	665	120,287	46.0	208	9,667	218
Pennsylvania.....	749	61,643	29.5	287	7,250	232
East North Central.....	2,813	181,990	28.6	1,083	28,840	580
Illinois.....	657	24,694	15.2	276	7,477	143
Indiana.....	496	31,139	36.3	157	4,301	84
Michigan.....	389	30,064	21.3	191	5,955	112
Ohio.....	900	61,361	36.3	333	8,338	157
Wisconsin.....	371	34,732	44.2	126	2,769	84
West North Central.....	1,771	114,820	40.1	855	13,272	319
Iowa.....	310	19,429	40.7	180	2,318	49
Kansas.....	256	14,219	36.5	134	2,137	41
Minnesota.....	406	37,283	56.6	230	2,222	68
Missouri.....	454	19,745	22.9	164	4,235	103
Nebraska.....	170	11,304	44.5	67	1,292	25
North Dakota.....	87	6,702	65.3	33	475	13
South Dakota.....	88	6,138	51.2	47	593	20
South Atlantic.....	2,276	170,082	22.5	948	34,799	911
Delaware.....	37	3,099	27.3	17	589	14
District of Columbia.....	20	1,986	27.5	15	458	24
Florida.....	718	55,235	19.6	308	11,303	253
Georgia.....	327	27,045	29.3	94	5,731	176
Maryland.....	238	16,980	26.1	53	3,186	105
North Carolina.....	408	32,097	27.9	166	5,158	114
South Carolina.....	178	12,921	22.5	72	2,798	81
Virginia.....	236	14,097	15.7	155	4,049	122
West Virginia.....	114	6,622	19.5	68	1,527	22
East South Central.....	951	62,404	24.2	452	11,374	324
Alabama.....	223	17,872	25.9	140	2,981	98
Kentucky.....	304	19,880	31.9	108	2,696	48
Mississippi.....	148	11,576	27.4	61	1,838	65
Tennessee.....	276	13,076	15.6	143	3,859	113
West South Central.....	1,666	107,469	28.0	1,453	21,391	552
Arkansas.....	191	10,827	24.6	180	1,785	60
Louisiana.....	250	20,646	34.5	243	3,506	128
Oklahoma.....	234	14,012	27.5	187	2,611	58
Texas.....	991	61,984	27.1	843	13,489	306
Mountain.....	749	50,143	22.6	471	9,468	234
Arizona.....	139	7,917	11.6	62	2,623	90
Colorado.....	200	13,711	29.2	128	2,201	39
Idaho.....	81	6,012	35.7	50	685	7
Montana.....	101	6,855	49.7	50	619	16
Nevada.....	44	4,789	19.2	37	937	19
New Mexico.....	70	2,652	11.3	66	1,059	31
Utah.....	81	5,494	26.3	41	1,022	23
Wyoming.....	33	2,713	40.9	37	322	9
Pacific.....	1,678	104,119	19.8	640	22,798	471
Alaska.....	15	502	11.5	16	437	2
California.....	1,244	79,135	20.7	488	16,909	364
Hawaii.....	41	3,443	20.6	14	751	17
Oregon.....	121	6,406	13.1	61	1,914	42
Washington.....	257	14,633	19.8	61	2,787	46
Outlying areas.....	9	383	0.4	49	1,004	40
Puerto Rico.....	7	287	0.5	45	921	32
Virgin Islands.....	1	60	5.6	2	26	3
Other.....	1	36	0.1	2	57	5

a. Based on total number of beneficiaries enrolled in the Hospital Insurance program as of December 2001.

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Maria Diacogiannis (410) 786-0178.

**Table 8.E1—Unduplicated number of recipients, total vendor payments, and average amounts, by type of medical service, selected fiscal years 1972–1998**

Fiscal year	Total	Inpatient services in—		Intermediate-care facility (ICF) services for—		Nursing facility <sup>a</sup>	Physicians'	Dental	Other practitioner	Out-patient hospital	Clinic	Laboratory and radiological	Home health	Pre-scribed drugs	Family planning	Other
		General hospital	Mental hospital	Mentally retarded	All other											
<b>Number (thousands)</b>																
1972.....	17,606	2,832	40	...	...	552	12,282	2,397	1,600	5,215	501	3,523	105	11,139	...	2,531
1975.....	22,007	3,432	67	69	682	630	15,198	3,944	2,673	7,437	1,086	4,738	343	14,155	1,217	2,911
1980.....	21,605	3,680	66	121	789	606	13,765	4,652	3,234	9,705	1,531	3,212	392	13,707	1,129	2,563
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>a</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>a</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>a</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	...	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	...	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	...	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	...	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	...	1,646	18,555	4,965	4,342	12,158	5,285	9,381	1,225	19,338	2,011	34,820
<b>Amount (millions of dollars)</b>																
1972.....	6,300	2,557	113	...	...	1,471	794	170	59	365	41	81	24	512	...	112
1975.....	12,242	3,374	405	380	1,885	2,434	1,225	339	127	373	389	126	70	815	67	233
1980.....	23,311	6,412	775	1,989	4,202	3,685	1,875	462	198	1,101	320	121	332	1,318	81	440
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	...	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	...	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	...	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	...	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	...	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	...	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	...	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	...	31,892	6,070	901	587	5,759	3,921	939	2,702	13,522	449	38,747
<b>Average amount (dollars)</b>																
1972.....	358	903	2,825	...	...	2,665	65	71	37	70	82	23	229	46	...	44
1975.....	556	983	6,017	5,538	2,764	3,865	81	86	48	50	358	27	204	58	55	80
1980.....	1,079	1,742	11,697	16,439	5,322	6,079	136	99	61	113	113	38	846	96	72	172
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	...	13,811	256	136	102	303	630	85	5,048	277	164	328
1992.....	2,936	4,075	28,364	56,502	...	14,965	282	149	114	349	685	88	5,283	307	196	342
1993.....	3,042	4,366	28,948	59,156	...	15,798	293	156	179	378	714	88	5,250	333	212	385
1994.....	3,089	4,463	24,120	52,571	...	16,533	296	153	192	383	713	88	5,445	363	201	444
1995.....	3,311	4,735	29,847	68,613	...	17,424	309	160	178	397	804	90	5,740	413	206	555
1996.....	3,369	4,696	21,873	68,232	...	18,589	317	166	205	409	833	96	6,293	474	200	566
1997.....	3,568	4,877	22,990	72,033	...	19,029	333	275	190	453	902	93	6,575	571	200	639
1998.....	3,501	5,031	20,701	74,960	...	19,379	327	182	135	474	742	100	2,206	699	223	1,113

a. Beginning in fiscal year 1991, "Nursing facility services" category combines "ICF, All other" and "Skilled nursing facility services," which were previously separate. Data under "Nursing facility services" prior to 1991, reflect "Skilled nursing facility services."

SOURCE: 1999 Medicaid Statistical Information System, MSIS; earlier years HCFA-Form 2082, Centers for Medicare & Medicaid Services.

NOTES: Fiscal year 1977 began in October 1976 and was the first year of the new federal cycle. Before 1977, the fiscal year began in July. Beginning in fiscal year 1980, recipients' categories do not add to unduplicated total because of the small number of recipients that are in more than one category during the year. Beginning in 1998 several new medical services were combined with Other Care excludes unknowns.  
... = not applicable.

CONTACT: Tony Parker (410) 786-0155.

## 8.E Medicaid: Recipient

**Table 8.E2—Unduplicated number of recipients, total vendor payments, and average amounts, by type of eligibility category, selected fiscal years 1972–1998**

Fiscal year	Total	Aged 65 or older	Blind	Permanent and total disability	Dependent children under age 21	Adults in families with dependent children	Other
<b>Number (thousands)</b>							
1972.....	17,606	3,318	108	1,625	7,841	3,137	1,576
1975.....	22,007	3,615	109	2,355	9,598	4,529	1,800
1980.....	21,605	3,440	92	2,819	9,333	4,877	1,499
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
<b>Amount (millions of dollars)</b>							
1972.....	6,300	1,925	45	1,354	1,139	962	875
1975.....	12,242	4,358	93	3,052	2,186	2,062	492
1980.....	23,311	8,739	124	7,497	3,123	3,231	596
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
<b>Average amount (dollars)</b>							
1972.....	358	580	417	833	145	307	555
1975.....	556	1,205	850	1,296	228	455	273
1980.....	1,079	2,540	1,358	2,659	335	663	398
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

SOURCE: 1999 Medicaid Statistical Information System, MSIS, earlier years HCFA-Form 2082, Centers for Medicare & Medicaid Services.

NOTES: Fiscal year 1977 began in October 1976 and was the first year of the new federal fiscal cycle. Before 1977, the fiscal year began in July. Beginning in fiscal year 1980, recipients' categories do not add to unduplicated total because of the small number of recipients that are in more than one category during the year. Beginning in 1997 Disability data includes Blindness. Children includes Foster Care, and Other are Unknowns. ... = not applicable.

CONTACT: Tony Parker (410) 786-0155.



**Table 8.H1—Number of recipients, amount of payments, and average amount per recipient, by state or other area, fiscal year 1998**

State or area	Recipients	Amount (millions of dollars)	Average amount (dollars)
All areas.....	40,649,482	142,318	3,501
Alabama.....	527,078	1,902	3,609
Alaska.....	74,508	330	4,434
Arizona.....	507,668	1,644	3,238
Arkansas.....	424,727	1,376	3,239
California.....	7,082,175	14,237	2,010
Colorado.....	344,916	1,439	4,173
Connecticut.....	381,208	2,421	6,350
Delaware.....	101,436	420	4,138
District of Columbia.....	166,146	731	4,402
Florida.....	1,904,591	5,687	2,986
Georgia.....	1,221,978	3,012	2,466
Hawaii.....	184,614	507	2,749
Idaho.....	123,176	425	3,446
Illinois.....	1,363,856	6,173	4,526
Indiana.....	607,293	2,564	4,222
Iowa.....	314,936	1,289	4,092
Kansas.....	241,933	916	3,788
Kentucky.....	644,482	2,425	3,763
Louisiana.....	720,615	2,384	3,308
Maine.....	170,456	747	4,383
Maryland.....	561,085	2,489	4,437
Massachusetts.....	908,238	4,609	5,075
Michigan.....	1,362,890	4,345	3,188
Minnesota.....	538,413	2,924	5,432
Mississippi.....	485,767	1,442	2,969
Missouri.....	734,015	2,570	3,501
Montana.....	100,760	361	3,585
Nebraska.....	211,188	753	3,566
Nevada.....	128,144	462	3,606
New Hampshire.....	93,970	606	6,449
New Jersey.....	813,251	4,219	5,188
New Mexico.....	329,418	862	2,617
New York.....	3,073,241	24,299	7,907
North Carolina.....	1,167,988	4,014	3,437
North Dakota.....	62,280	341	5,476
Ohio.....	1,290,776	6,121	4,742
Oklahoma.....	342,475	1,178	3,439
Oregon.....	511,171	1,378	2,695
Pennsylvania.....	1,523,120	6,080	3,992
Rhode Island.....	153,130	919	6,004
South Carolina.....	594,962	2,019	3,393
South Dakota.....	89,537	356	3,974
Tennessee.....	1,843,661	3,167	1,718
Texas.....	2,324,810	7,140	3,071
Utah.....	215,801	619	2,867
Vermont.....	123,992	351	2,834
Virginia.....	653,236	2,118	3,243
Washington.....	1,413,208	2,044	1,447
West Virginia.....	342,668	1,243	3,628
Wisconsin.....	518,595	2,206	4,255
Wyoming.....	46,121	192	4,163
Outlying areas			
Puerto Rico.....	964,015	250	259
Virgin Islands.....	19,764	10	511

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Tony Parker (410) 786-0155.

## 9.A Unemployment Insurance

**Table 9.A2—Summary data on state programs, 2001**

State or area	Covered employment (excludes federal government)		Insured unemployment as percent of covered employment <sup>a</sup>	Number of first payments	Average weekly benefit for total unemployment		Average weekly insured unemployment	Average actual duration (weeks)	Claimants exhausting benefits <sup>b</sup>		Contributions collected <sup>c</sup> (millions of dollars)	Benefits paid <sup>d</sup> (millions of dollars)	Average employer contribution rate <sup>e</sup> (percent)
	Average number of workers (thousands)	Total payroll <sup>f</sup> (millions of dollars)			Amount <sup>g</sup> (dollars)	Percent of average weekly wages <sup>h</sup>			Number	Percent of first payments <sup>b</sup>			
Total..	127,944	4,580,925	2.3	9,877,448	238.07	34.6	2,973,783	13.8	2,827,089	34.1	19,680.2	31,629.2	1.7
AL.....	1,804	53,325	2.1	164,210	164.17	28.9	38,494	11.0	37,120	23.8	176.7	285.0	1.3
AK.....	266	9,389	4.6	44,017	193.01	28.5	12,227	14.2	17,256	40.2	109.1	111.9	2.6
AZ.....	2,195	72,798	1.5	113,334	172.74	27.1	32,647	13.4	29,660	35.7	147.6	274.4	0.9
AR.....	1,106	29,804	3.1	115,116	220.10	42.5	34,651	11.9	31,496	31.8	156.4	276.8	1.8
CA.....	14,723	606,882	3.0	1,289,136	172.01	21.7	435,308	15.5	427,497	39.3	2,736.0	3,362.2	2.6
CO.....	2,148	80,924	1.3	94,146	291.47	40.2	27,196	11.6	31,127	48.8	166.9	319.9	0.9
CT.....	1,644	77,214	2.3	147,056	277.09	30.7	38,301	13.3	30,575	25.8	276.9	509.1	1.4
DE.....	401	15,377	1.8	29,531	220.71	29.9	7,265	13.6	6,050	21.7	52.6	94.5	1.7
DC.....	452	23,822	1.3	22,703	261.56	25.8	6,086	15.7	8,436	53.5	92.8	91.3	2.2
FL.....	7,040	220,045	1.5	336,088	223.24	37.1	102,127	12.8	112,932	43.3	525.4	965.2	1.1
GA.....	3,783	131,759	1.6	269,538	228.42	34.1	61,549	10.2	72,221	31.1	133.7	606.0	0.5
HI.....	527	15,992	2.2	40,245	296.97	50.9	11,527	12.7	7,478	28.2	106.9	141.8	1.1
ID.....	558	15,303	3.0	57,109	223.46	42.4	16,532	12.1	14,541	29.1	83.2	146.0	1.2
IL.....	5,795	225,505	2.6	446,294	268.68	35.9	150,491	15.4	129,770	34.9	1,007.1	1,902.0	2.1
IN.....	2,833	89,510	1.9	206,761	243.98	40.2	55,049	11.7	61,037	34.8	210.6	596.4	1.1
IA.....	1,410	40,427	2.0	113,983	249.57	45.3	28,078	11.6	21,356	21.4	203.8	312.8	1.2
KS.....	1,294	38,649	1.6	69,886	260.89	45.4	21,126	13.4	18,629	28.9	172.9	240.3	1.3
KY.....	1,700	50,623	2.1	145,026	234.32	40.9	36,464	13.0	26,814	20.7	220.8	413.1	1.7
LA.....	1,835	52,880	1.5	87,044	193.94	35.0	28,026	14.0	26,755	33.6	117.8	231.6	1.5
ME.....	579	16,445	1.9	34,545	215.83	39.5	10,904	14.4	8,747	28.5	145.2	100.6	2.8
MD.....	2,296	85,063	1.7	124,289	235.27	33.0	38,791	13.7	31,446	30.7	259.6	393.0	1.4
MA.....	3,222	144,671	2.8	271,897	334.72	38.8	89,572	15.6	69,684	33.8	822.4	1,366.4	2.3
MI.....	4,418	164,684	3.1	525,766	260.73	36.4	135,942	12.2	120,730	25.7	962.2	1,632.5	2.6
MN.....	2,576	93,924	1.9	164,690	306.73	43.7	49,469	14.0	40,674	30.4	330.5	663.3	0.9
MS.....	1,086	27,698	2.5	82,333	162.99	33.2	26,833	13.8	23,372	31.5	95.4	181.7	1.3
MO.....	2,598	83,530	2.1	174,147	200.49	32.4	55,569	14.0	49,515	30.4	236.3	491.2	1.4
MT.....	371	9,103	2.4	26,187	194.19	41.1	8,728	14.2	8,175	30.5	59.2	67.8	1.1
NE.....	868	24,418	1.2	38,498	204.80	37.9	10,323	12.3	11,320	34.0	55.0	95.4	1.0
NV.....	1,029	33,847	2.6	93,051	228.46	36.1	27,228	13.4	26,595	37.5	222.7	292.4	1.3
NH.....	602	21,264	1.1	26,728	240.59	35.4	6,371	9.5	1,922	11.3	32.2	66.8	0.8
NJ.....	3,810	168,150	2.9	312,865	308.91	36.4	109,050	16.7	133,631	50.3	1,335.7	1,550.4	2.0
NM.....	700	19,552	1.7	34,903	193.23	36.0	11,648	14.7	9,878	33.2	73.0	97.3	0.9
NY.....	8,293	387,038	2.5	624,207	268.99	30.0	208,477	15.7	245,313	50.0	1,840.7	2,716.1	3.0
NC.....	3,741	119,166	2.4	382,640	248.00	40.5	91,579	10.6	74,072	23.5	315.9	936.8	0.7
ND.....	302	7,644	1.4	13,383	218.17	44.8	4,146	13.2	4,336	36.0	39.9	43.9	1.2
OH.....	5,353	176,814	2.1	364,626	247.65	39.0	113,087	13.6	80,264	24.8	594.1	1,242.3	1.4
OK.....	1,416	38,850	1.3	61,786	227.88	43.2	18,543	13.2	17,935	35.1	54.2	175.5	0.4
OR.....	1,567	51,604	3.9	203,344	255.97	40.4	60,431	14.4	51,655	30.7	453.2	675.1	1.7
PA.....	5,444	189,067	3.3	545,596	281.52	42.2	178,252	15.0	122,679	26.5	1,372.8	2,132.2	3.6
RI.....	458	15,189	3.0	44,154	289.12	45.3	13,949	14.3	13,579	33.7	133.7	174.3	3.0
SC.....	1,757	50,994	2.6	161,564	205.88	36.9	45,018	11.9	38,957	29.1	167.1	385.5	1.4
SD.....	354	8,881	0.8	10,945	189.91	39.3	2,946	10.2	1,001	10.4	13.8	23.7	0.6
TN.....	2,575	80,195	2.3	247,085	197.81	33.0	60,429	12.3	70,324	32.2	271.4	580.2	1.5
TX.....	9,174	328,772	1.7	484,532	241.35	35.0	151,953	14.0	210,515	56.0	1,113.0	1,545.5	1.2
UT.....	1,017	30,124	1.5	60,270	252.84	44.4	15,678	11.8	16,545	34.7	66.0	177.5	0.5
VA.....	292	8,754	2.0	25,236	232.93	40.4	5,964	11.6	2,965	14.8	41.6	64.1	2.0
VT.....	3,290	118,188	1.1	150,664	234.63	34.0	35,332	10.3	30,116	25.4	150.4	392.3	0.6
WA.....	2,623	97,576	3.6	272,761	311.27	43.5	93,503	16.4	70,512	30.8	960.3	1,250.20	2.1
WV.....	664	18,188	2.3	51,251	202.14	38.4	15,198	13.2	9,790	19.0	131.8	132.1	2.9
WI.....	2,687	84,409	2.9	327,155	241.71	40.0	77,361	11.5	55,913	19.9	425.4	811.5	1.8
WY.....	230	6,358	1.3	11,559	215.31	40.6	2,907	11.0	2,571	22.8	22.0	27.0	1.2
Other													
PR.....	995	19,234	5.5	131,291	93.62	25.2	54,883	18.4	61,052	49.1	179.2	258.1	3.4
VI.....	43	1,246	1.3	2,277	225.74	40.9	574	12.3	556	42.9	7.0	6.2	2.7

a. Based on average covered employment in 12-month period.

b. Percentages based on first payments for 12-month period.

c. 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.

d. Adjusted to exclude voided benefit checks and for transfers under interstate combined-wage plan. Excludes Extended Benefits and Emergency Unemployment Compensation.

e. Estimated data. As a percentage of taxable payroll. Standard contribution rate for most states, 2.7 percent. Excludes state and local jurisdictions covering state and local government employees on a reimbursable basis.

f. Total wages earned in covered employment during all pay periods ended within the year.

g. Includes dependents' allowances for states that provide such benefits.

h. Based on average total weekly wage in current year.

SOURCES: Department of Labor, Employment and Training Administration and Bureau of Labor Statistics; based on data submitted by state agencies.

NOTE: 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.

CONTACT: Cindy Ambler (202) 693-3177.

Table 9.B1—Coverage, benefits, and costs, selected years 1940–2000

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>e</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	109.4	44,586	22,306	10,753	11,527	17,194	27,392	2.05	1.52
1995	112.8	43,373	21,145	10,996	11,232	16,733	26,640	1.83	1.39
1996	114.8	41,836	20,392	10,669	10,775	16,555	25,281	1.66	1.26
1997	117.6	41,085	20,905	10,310	9,870	15,698	25,387	1.47	1.15
1998	120.8	42,213	22,591	10,381	9,241	16,305	25,907	1.37	1.09
1999	123.8	43,137	23,615	10,216	9,305	17,938	25,199	1.32	1.04
2000	126.6	45,916	25,652	10,424	9,840	20,005	25,911	1.25	1.03

a. Costs include: premiums written by private carriers and state funds; benefits paid plus 11 percent administrative costs for self-insured employers; and benefits paid plus administrative expenses for federal system for government employees.

b. Excludes programs financed from general revenue—mostly for federal Black Lung benefits.

c. Net cash and medical benefits paid by private insurance companies under standard workers' compensation policies.

d. Net cash and medical benefits paid by competitive and exclusive state funds and by federal system for government employees; beginning in 1970, also includes cash benefits paid by federal Black Lung program.

e. Cash and medical benefits paid by self-insurers, plus value of medical benefits paid by employers carrying workers' compensation policies that exclude standard medical coverage.

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.

CONTACT: Virginia Reno (202) 452-8097.

## 9.B Workers' Compensation

**Table 9.B2—Benefits, by state and federal program, 1997–2000 (in thousands of dollars)**

State and federal program	1997	1998	1999	2000
United States, total <sup>a</sup>	41,084,959	42,212,616	43,137,227	45,915,902
Alabama	530,230	615,316	596,233	529,189
Alaska	130,045	128,576	137,630	155,628
Arizona	427,885	393,907	426,739	481,520
Arkansas	157,128	161,146	165,341	187,825
California	7,073,544	7,374,486	7,856,442	8,949,070
Colorado	675,008	709,535	655,446	768,758
Connecticut	731,830	711,130	722,156	667,056
Delaware	120,719	118,511	96,877	100,247
District of Columbia	81,696	75,800	81,757	77,682
Florida	2,374,287	2,207,984	2,079,830	2,272,859
Georgia	713,955	808,533	813,754	881,848
Hawaii	254,995	233,491	211,138	231,359
Idaho	138,800	154,762	153,012	167,664
Illinois	1,576,651	1,689,846	1,715,615	1,812,577
Indiana	437,797	482,029	520,621	550,394
Iowa	273,155	292,002	283,253	328,854
Kansas	312,698	318,352	326,196	341,505
Kentucky	413,483	430,958	460,583	516,360
Louisiana	419,777	428,782	427,851	455,142
Maine	271,307	246,169	249,195	252,283
Maryland	1,113,399	1,045,372	1,152,005	1,194,629
Massachusetts	653,327	641,409	633,840	666,455
Michigan	1,332,222	1,366,963	1,392,806	1,574,467
Minnesota	738,100	732,300	744,600	798,100
Mississippi	231,340	234,700	253,532	269,215
Missouri	527,053	589,366	591,292	525,553
Montana	157,367	170,715	144,856	150,269
Nebraska	184,673	181,945	173,149	186,217
Nevada	346,021	330,092	372,764	286,522
New Hampshire	155,397	163,885	170,347	168,439
New Jersey	923,460	954,696	987,378	1,066,542
New Mexico	119,893	116,819	117,168	136,830
New York	2,618,320	2,686,247	2,782,474	2,828,018
North Carolina	619,021	765,817	708,144	788,369
North Dakota	76,617	81,403	76,997	85,767
Ohio	2,030,046	2,068,878	2,018,909	2,091,992
Oklahoma	547,355	520,181	464,095	417,478
Oregon	417,222	430,521	384,110	412,710
Pennsylvania	2,471,021	2,418,072	2,441,255	2,378,591
Rhode Island	97,926	104,199	109,148	122,316
South Carolina	459,377	483,606	511,735	596,526
South Dakota	73,862	72,722	80,331	76,453
Tennessee	432,662	517,846	512,651	588,475
Texas	1,377,393	1,494,410	1,673,064	1,949,128
Utah	127,492	146,986	180,666	159,280
Vermont	87,488	95,056	103,607	114,393
Virginia	534,350	591,068	579,991	534,014
Washington	1,234,495	1,309,371	1,418,255	1,499,070
West Virginia	616,790	629,480	665,403	741,049
Wisconsin	594,463	621,973	652,281	703,299
Wyoming	68,068	74,469	71,151	46,357
Federal programs				
Civilian employee	1,900,953	1,955,287	2,008,909	2,099,613
Black lung <sup>b</sup>	1,102,798	1,035,450	980,642	931,946

- a. Calendar year data, except fiscal year data for federal civilian and other programs and for some states with state funds. Payments represent compensation and medical benefits and include insurance losses paid by private insurance carriers (compiled from state workers' compensation agencies and the A.M. Best Company); disbursement of state funds (compiled from the A.M. Best Company, state workers' compensation agencies, and U.S. Census Bureau); and self-insurance payments, estimated from available state data. Includes benefit payments under Longshore and Harbor Workers' Compensation Act for states in which such payments are made. For data for 1990, and 1993–1995, see U.S. Census Bureau, *Statistical Abstract of the United States: 1999* (119th ed.) Washington, D.C., 1999, Table 630, p. 397.
- b. Includes payments by the Social Security Administration and the Department of Labor.

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.

CONTACT: Virginia Reno (202) 452-8097.

Table 9.B3—Type of insurer and medical benefits, by state and federal program, 2000 (in thousands of dollars)

State and federal 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 cash benefits
United States, total.....	45,915,902	.....	.....	.....	20,005,232	43.6
Alabama.....	529,189	304,964	.....	224,225	295,425	55.9
Alaska.....	155,628	124,733	.....	30,895	94,598	60.8
Arizona.....	481,520	221,036	190,147	70,337	289,456	<sup>c</sup> 60.5
Arkansas.....	187,825	127,434	.....	60,391	111,797	59.7
California.....	8,949,070	5,273,661	1,146,339	2,529,070	4,072,954	<sup>d</sup> 45.8
Colorado.....	768,758	315,068	250,606	203,084	354,733	<sup>c</sup> 46.1
Connecticut.....	667,056	498,584	.....	168,473	257,414	<sup>c</sup> 38.7
Delaware.....	100,247	80,685	.....	19,562	42,900	<sup>d</sup> 42.9
District of Columbia.....	77,682	60,648	.....	17,035	25,720	<sup>c</sup> 33.2
Florida.....	2,272,859	1,729,765	.....	543,093	1,228,025	<sup>c</sup> 54.2
Georgia.....	881,848	486,476	.....	395,372	405,876	<sup>c</sup> 46.0
Hawaii.....	231,359	153,432	15,602	62,325	96,478	<sup>c</sup> 41.8
Idaho.....	167,664	71,266	84,266	12,132	94,074	<sup>c</sup> 56.1
Illinois.....	1,812,577	1,412,631	.....	399,946	796,963	<sup>c</sup> 44.0
Indiana.....	550,394	419,695	.....	130,699	356,860	<sup>d</sup> 64.8
Iowa.....	328,854	266,927	.....	61,927	161,891	<sup>c</sup> 49.3
Kansas.....	341,505	246,390	.....	95,114	183,575	<sup>d</sup> 54.1
Kentucky.....	516,360	322,211	21,605	172,544	275,514	<sup>c</sup> 53.7
Louisiana.....	455,142	243,807	105,925	105,410	226,548	<sup>c</sup> 49.9
Maine.....	252,283	110,266	52,426	89,591	104,371	<sup>c</sup> 42.9
Maryland.....	1,194,629	921,002	163,510	110,117	511,901	<sup>c</sup> 42.9
Massachusetts.....	666,455	577,209	.....	89,246	218,897	<sup>c</sup> 42.9
Michigan.....	1,574,467	909,278	.....	665,189	540,692	<sup>d</sup> 39.2
Minnesota.....	798,100	529,600	88,100	180,400	369,500	<sup>c</sup> 46.3
Mississippi.....	269,215	177,951	.....	91,264	150,926	<sup>c</sup> 56.0
Missouri.....	525,553	437,763	50,127	37,663	255,076	<sup>c</sup> 48.2
Montana.....	150,269	61,442	64,230	24,598	79,343	<sup>c</sup> 52.4
Nebraska.....	186,217	136,438	.....	49,779	101,468	<sup>c</sup> 55.0
Nevada.....	286,522	230,610	.....	55,912	131,469	<sup>c</sup> 46.7
New Hampshire.....	168,439	131,710	.....	36,729	90,357	<sup>c</sup> 53.8
New Jersey.....	1,066,542	978,232	.....	88,310	457,069	<sup>d</sup> 42.9
New Mexico.....	136,830	78,829	11,570	46,431	78,879	<sup>c</sup> 57.8
New York.....	2,828,018	1,346,945	839,136	641,937	925,576	29.9
North Carolina.....	788,369	589,435	.....	198,934	349,149	<sup>d</sup> 44.4
North Dakota.....	85,767	483	85,284	.....	45,583	<sup>d</sup> 42.9
Ohio.....	2,091,992	21,680	1,630,436	439,876	868,891	<sup>d</sup> 41.5
Oklahoma.....	417,478	257,945	100,753	58,781	191,852	<sup>c</sup> 46.0
Oregon.....	412,710	222,142	158,660	31,909	201,518	<sup>c</sup> 48.9
Pennsylvania.....	2,378,591	1,660,173	154,560	563,857	903,314	<sup>d</sup> 38.1
Rhode Island.....	122,316	58,223	53,151	10,943	37,623	<sup>c</sup> 30.8
South Carolina.....	596,526	429,146	44,651	122,730	267,016	<sup>c</sup> 44.9
South Dakota.....	76,453	63,363	.....	13,090	46,694	<sup>c</sup> 61.2
Tennessee.....	588,475	459,169	.....	129,306	300,684	<sup>c</sup> 51.2
Texas.....	1,949,128	1,582,644	204,035	162,449	1,165,390	<sup>d</sup> 59.8
Utah.....	159,280	72,347	69,392	17,541	106,337	<sup>c</sup> 66.8
Vermont.....	114,393	87,737	.....	26,656	54,671	<sup>c</sup> 47.9
Virginia.....	534,014	482,455	.....	51,559	279,594	<sup>c</sup> 52.4
Washington.....	1,499,070	19,262	1,147,139	332,669	525,987	<sup>d</sup> 35.2
West Virginia.....	741,049	2,679	615,581	122,788	219,052	<sup>d</sup> 29.6
Wisconsin.....	703,299	655,442	.....	47,857	414,678	<sup>d</sup> 59.0
Wyoming.....	46,357	933	45,424	.....	19,887	<sup>d</sup> 42.9
Total other than federal programs.....	42,884,343	25,651,943	7,392,656	9,839,744	19,384,246	45.2
Federal programs.....	3,031,559	.....	.....	.....	620,986	20.5
Civilian employee.....	2,099,613	.....	.....	.....	548,596	26.1
Black Lung.....	931,946	.....	.....	.....	72,390	7.8

a. States with exclusive funds (Nevada, North Dakota, Ohio, Washington, West Virginia, and Wyoming) also 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. In 2000, the medical benefits estimation method changed. Medical estimates were based on data provided by the National Council on Compensation Insurance.

d. For these states, the data used for the imputation procedure were unavailable, so the percentage of medical benefits was estimated to be the weighted average of the percentages in the states reporting such a percentage.

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.

CONTACT: Virginia Reno (202) 452-8097.

## 9.C Temporary Disability Insurance

**Table 9.C1—Selected data on state and railroad programs, 1999**

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 (weeks) per period paid	Contributions collected (millions of dollars)	Net benefits paid (millions of dollars)	Administrative expenditures (millions of dollars) <sup>b</sup>
California <sup>c</sup> .....	12,274	282,800	d	d	d	d	1,910.0	170.0
State-operated fund.....	11,798	265	80.0	234.47	12.30	1,360.3	1,749.0	142.0
Private plans .....	476	18,200	d	395.90	11.12	145.0	162.0	28.0
Hawaii <sup>e</sup> (private plans).....	283	5,853	23.1	385.00	3.43	39.6	30.5	d
New Jersey <sup>f</sup> .....	g 3,425	d	d	d	d	d	470.3	34.0
State-operated fund.....	g 2,743	g 47,100	d	295.00	d	378.6	333.0	h 32.4
Private plans .....	g 682	d	d	d	d	d	137.3	1.6
New York.....	6,437	i 44,423	48.6	185.92	7.00	d	532.6	f 8.7
Special state fund <sup>j</sup> .....	...	...	0.5	149.24	15.50	d	4.0	d
Private plans <sup>k</sup> .....	6,437	44,423	48.1	186.31	7.00	d	l 528.5	d
Puerto Rico .....	630	12,505	d	d	d	d	9.0	4.5
State-operated fund.....	108	8,603	1.3	86.05	9.20	13.2	5.7	4.1
Private plans .....	522	3,902	0.7	92.42	7.96	0.9	3.3	0.4
Rhode Island (state-operated fund).....	400	9,215	8.0	275.00	8.70	117.0	114.3	5.7
Railroad (publicly operated fund).....	256	3,076	m 5.6	n 219.55	n 14.00	o 110.1	p 38.0	o 15.1

- 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 1998.  
d. Data not available.  
e. Includes data not shown separately for special fund for workers whose disability begins during unemployment. In 1999, the fund paid \$51,161 in benefits.  
f. State fiscal year data.  
g. Estimated data.  
h. Costs elevated because of expenditures for 2000.  
i. First \$7,000 of earnings of each employee, which was paid by the employer during the calendar year.  
j. For workers whose disability begins during unemployment.  
k. Includes State Insurance Fund of \$11.9 million.  
l. Includes medical, surgical, and hospital benefits amounting to \$62.7 million paid under approved plans.  
m. For 14-day registration period.  
n. For benefit year 1998–1999 (July 1, 1998–June 30, 1999).  
o. Single system of contributions and administrative operations for railroad unemployment insurance and temporary disability; collections amounted to \$110.1 million and administrative expenses to \$15.1 million for the system in 1999.  
p. Of this amount, \$34.3 million was for regular benefits and \$3.6 million for extended benefits.

SOURCES: State agencies and Railroad Retirement Board.

NOTE: . . . = not applicable.

CONTACT: Rita L. DiSimone (202) 358-6221.

Table 9.D1—Currently payable to miners, widows, and dependents, December 1970–2001

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

a. Includes wives of living miners, divorced wives, children, and dependent brothers and sisters of miners.

SOURCE: Department of Labor, Beneficiary Master Table, 100 percent data.

NOTE: Benefits payable under Part B of the Black Lung program established by the Federal Coal Mine Health and Safety Act of 1969. Beginning October 1, 1997, responsibility for maintenance and payment of Part B benefits was transferred from the Social Security Administration (SSA) to the Department of Labor (DOL); SSA, however, maintains responsibility for conducting formal hearings necessary to resolve contested issues with regard to Part B claims. Benefits under Part C (generally claims arising July 1, 1973 and later) are also administered by the DOL but are not included here.

CONTACT: Wayne Tacy (301) 731-5116 or Joseph Bondar (410) 965-0162.

## 9.D Black Lung Benefits

**Table 9.D2—Currently payable to miners, widows, and dependents, by state or other area, June 2002**

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.....	75,526	9,023	52,921	13,582	36,795	6,239	30,556
Alabama.....	3,038	224	2,313	501	1,503	156	1,347
Alaska.....	11	0	11	0	6	0	6
Arizona.....	236	21	190	25	118	14	104
Arkansas.....	437	48	338	51	216	33	184
California.....	497	42	397	58	249	27	222
Colorado.....	540	46	430	64	270	32	238
Connecticut.....	143	6	125	12	72	4	69
Delaware.....	95	8	77	10	48	5	43
District of Columbia.....	23	<sup>d</sup>	19	<sup>d</sup>	11	<sup>d</sup>	10
Florida.....	1,791	216	1,280	295	875	153	722
Georgia.....	308	30	237	41	153	19	134
Hawaii.....	4	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	2	<sup>d</sup>	<sup>d</sup>
Idaho.....	26	<sup>d</sup>	18	5	13	<sup>d</sup>	10
Illinois.....	2,694	208	2,173	313	1,353	138	1,215
Indiana.....	1,466	131	1,097	238	729	90	640
Iowa.....	316	29	245	42	159	19	139
Kansas.....	132	<sup>d</sup>	120	9	67	<sup>d</sup>	65
Kentucky.....	10,881	1,775	6,483	2,623	5,125	1,267	3,859
Louisiana.....	34	4	24	6	17	3	14
Maine.....	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>
Maryland.....	694	64	514	116	344	42	303
Massachusetts.....	40	<sup>d</sup>	33	6	20	<sup>d</sup>	20
Michigan.....	843	55	665	123	424	38	386
Minnesota.....	23	0	20	3	12	0	12
Mississippi.....	52	6	36	10	25	4	21
Missouri.....	245	11	204	30	123	7	116
Montana.....	93	7	76	10	47	5	42
Nebraska.....	9	0	8	<sup>d</sup>	5	0	5
Nevada.....	68	4	57	7	34	3	31
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.....	554	30	466	58	279	20	259
New Mexico.....	164	12	127	25	81	9	73
New York.....	488	25	400	63	247	17	230
North Carolina.....	655	62	484	109	323	44	280
North Dakota.....	4	0	4	0	2	0	2
Ohio.....	4,625	399	3,453	773	2,295	277	2,018
Oklahoma.....	337	41	251	45	166	27	139
Oregon.....	51	6	36	9	25	4	21
Pennsylvania.....	18,468	1,958	13,997	2,513	9,175	1,294	7,881
Rhode Island.....	7	0	6	<sup>d</sup>	4	0	4
South Carolina.....	227	20	162	45	111	15	95
South Dakota.....	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>	<sup>d</sup>
Tennessee.....	2,983	329	2,110	544	1,456	228	1,228
Texas.....	218	16	166	36	110	10	100
Utah.....	372	46	275	51	183	32	151
Vermont.....	6	0	6	0	3	0	3
Virginia.....	6,025	929	3,785	1,311	2,871	659	2,212
Washington.....	137	13	110	14	68	9	60
West Virginia.....	15,166	2,174	9,643	3,349	7,224	1,519	5,705
Wisconsin.....	37	<sup>d</sup>	31	<sup>d</sup>	19	<sup>d</sup>	17
Wyoming.....	131	9	106	16	66	6	60
Other.....	124	7	102	15	63	6	59

a. Includes wives of living miners, divorced wives, children, and dependent brothers and sisters of miners.

b. Includes benefits for wives and children.

c. 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.

d. Not shown to avoid disclosure of information regarding particular individuals.

SOURCE: Department of Labor, Beneficiary Master Table, 100 percent data.

NOTES: December 2001 data not available. Benefits payable under Part B of the Black Lung program established by the Federal Coal Mine Health and Safety Act of 1969. Beginning October 1, 1997, responsibility for maintenance and payment of Part B benefits was transferred from the Social Security Administration (SSA) to the Department of Labor (DOL); SSA, however, maintains responsibility for conducting formal hearings necessary to resolve contested issues with regard to Part B claims. Benefits under Part C (generally claims arising July 1, 1973 and later) are also administered by the DOL but are not included here.

CONTACT: Wayne Tacy (301) 731-5116 or Joseph Bondar (410) 965-0162.



**Table 9.F1—Number of payments, by type of payment and age, selected months and years, 1940–2001  
(in thousands)**

Month and year	Disability compensation or pension										
	Total <sup>a</sup>	Service-connected							Not-service-connected		
		All ages	Under age 65			Aged 65 or older			All ages	Under age 65	Aged 65 or older
			Total	Disability rating <sup>b</sup>		Total	Disability rating <sup>b</sup>				
	Less than 70 percent	70–100 percent		Less than 70 percent	70–100 percent						
<b>As of June 30</b>											
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
<b>As of June 20</b>											
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
<b>As of September 30</b>											
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

a. Persons receiving payments under special acts and as retired emergency and reserve officers are included in total but not in the distribution.

b. Disability rated by the Department of Veterans Affairs according to average impairment of earning capacity, graduated in intervals from 10 percent to 100 percent.

SOURCE: Department of Veterans Affairs published and unpublished data.

NOTE: ... = not applicable.

CONTACT: Gloria Royce (202) 273-5776.

9.G TANF/AFDC and Emergency Assistance

Table 9.G1—Average monthly number of families and recipients, total amount of cash assistance, and average monthly payment, selected years 1936–2001

Year	Temporary Assistance for Needy Families/ Aid to Families with Dependent Children <sup>a</sup>						Emergency Assistance <sup>b</sup>		
	Average monthly number (thousands)			Amount of assistance <sup>c</sup> (dollars)			Average monthly number of families (thousands)	Total assistance payments during year (thousands of dollars)	Average monthly payment per family (dollars)
	Families	Recipients		Total (thousands)	Monthly average per—				
		Total	Children		Family	Recipient			
1936	147	534	361	49,678	28.15	7.75	...	...	...
1940	349	1,182	840	133,770	31.98	9.43	...	...	...
1945	259	907	656	149,667	48.18	13.75	...	...	...
1950	644	2,205	1,637	551,653	71.33	17.64	...	...	...
1955	612	2,214	1,673	617,841	84.17	23.26	...	...	...
1960	787	3,005	2,314	1,000,784	105.75	27.75	...	...	...
1961	869	3,354	2,587	1,156,769	110.97	28.74	...	...	...
1962	931	3,676	2,818	1,298,774	116.30	29.44	...	...	...
1963	947	3,876	2,909	1,365,851	120.19	29.36	...	...	...
1964	992	4,118	3,091	1,510,352	126.88	30.57	...	...	...
1965	1,039	4,329	3,256	1,660,186	133.20	31.96	...	...	...
1966	1,088	4,513	3,411	1,863,925	142.83	34.42	...	...	...
1967	1,217	5,014	3,771	2,266,400	155.19	37.67	...	...	...
1968	1,410	5,705	4,275	2,849,298	168.41	41.62	...	...	...
1969	1,698	6,706	4,985	3,563,427	174.89	44.28	7.5	6,699	117.23
1970	2,208	8,466	6,214	4,852,964	183.13	47.77	7.5	11,396	126.14
1971	2,762	10,241	7,434	6,203,528	187.16	50.48	11.1	19,843	148.54
1972	3,049	10,947	7,905	6,909,260	188.87	52.60	19.9	44,180	184.91
1973	3,148	10,949	7,902	7,212,035	190.91	54.89	18.8	39,265	174.05
1974	3,230	10,864	7,822	7,916,563	204.27	60.72	31.3	64,031	170.38
1975	3,498	11,346	8,095	9,210,995	219.44	67.65	38.3	77,516	168.85
1976	3,579	11,304	8,001	10,140,543	236.10	74.75	27.5	55,673	168.43
1977	3,588	11,050	7,773	10,603,820	246.27	79.97	32.8	66,132	168.05
1978	3,522	10,570	7,402	10,730,415	253.89	84.60	34.5	80,919	195.24
1979	3,509	10,312	7,179	11,068,864	262.86	89.45	35.7	84,043	195.92
1980	3,712	10,774	7,419	12,475,245	280.03	96.49	48.6	113,238	194.29
1981	3,835	10,079	7,527	12,981,115	282.04	97.64	49.1	123,467	209.51
1982	3,542	10,258	6,903	12,877,906	303.02	103.60	27.5	102,344	<sup>d</sup> 278.54
1983	3,686	10,761	7,098	13,837,228	312.82	107.16	30.0	125,246	<sup>d</sup> 283.15
1984	3,714	10,831	7,144	14,503,710	325.44	111.60	32.1	141,137	<sup>d</sup> 276.97
1985	3,701	10,855	7,198	15,195,835	342.15	116.65	32.6	157,304	<sup>d</sup> 312.98
1986	3,763	11,038	7,334	16,033,074	355.04	121.05	34.8	178,824	<sup>d</sup> 362.45
1987	3,776	11,027	7,366	16,372,535	361.37	123.73	42.4	213,903	<sup>d</sup> 358.29
1988	3,749	10,915	7,329	16,826,794	374.07	128.47	48.8	278,906	<sup>d</sup> 420.89
1989	3,799	10,993	7,420	17,465,943	383.14	132.40	48.7	296,841	<sup>d</sup> 461.45
1990	4,057	11,695	7,917	19,066,541	391.67	135.86	56.0	348,986	<sup>d</sup> 476.50
1991	4,467	12,930	8,715	20,930,600	390.44	134.89	59.7	302,894	<sup>d</sup> 422.07
1992	4,829	13,773	9,303	21,655,881	373.71	131.03	52.7	272,853	<sup>d</sup> 431.41
1993	5,012	14,205	9,574	22,688,016	377.24	133.10	56.8	387,113	<sup>d</sup> 568.17
1994	5,035	14,164	9,570	22,827,399	377.78	134.30	60.5	802,258	<sup>d</sup> 1,105.95
1995	4,791	13,418	9,135	21,608,686	375.31	134.21	84.1	3,447,361	<sup>d</sup> 3,415.93
1996	4,434	12,321	8,469	20,614,437	386.68	139.44	69.8	2,708,401	<sup>d</sup> 3,235.10
1997	3,740	10,376	7,042	22,031,399	490.01	176.95	81.8	403,138	<sup>d</sup> 410.74
1998 <sup>e</sup>	3,050	8,347	6,034	12,925,846	353.13	129.04	...	...	...
1999	2,553	6,822	5,120	10,929,489	356.70	133.52	...	...	...
2000	2,216	5,778	4,268	10,489,603	394.55	151.28	...	...	...
2001	2,104	5,363	3,987	10,124,437	401.09	157.32	...	...	...

- a. Thirty-four states had converted to TANF as of January 1, 1997; eight phased in over the next 5 months; the remaining 12 waited until July 1, 1997.
- b. Reporting initiated July 1969. Number of states with program: 1969–1970, 23; 1971, 24; 1972, 27; 1973–1975, 29; 1976–1978, 26; 1979, 24; 1980–1984, 27; 1985–1986, 28; 1987, 29; 1988, 30; 1989, 31; 1990, 33; 1991, 34; 1992, 34; 1993, 35; 1994, 49; 1995, 50; 1996, 51; and 1997, 34. Program ended June 30, 1997.
- c. TANF expenditures include cash payments and services.
- d. Excludes family count and expenditures for states providing only partial data.
- e. 1998 was the first full year under the TANF data reporting system for all states.

SOURCE: Department of Health and Human Services.

NOTES: Includes nonmedical vendor payments. Includes Alaska and Hawaii, beginning in 1943; Puerto Rico and the Virgin Islands, beginning in October 1950; and Guam, beginning in July 1959.  
 ... = not applicable.

CONTACT: Evelyn Mills (202) 401-4055.

**Table 9.G2—Average monthly number of families and recipients of Temporary Assistance for Needy Families and total amount of assistance, by state or other area, 2000**

State or area	TANF effective date <sup>a</sup>	Average monthly number			Amount of assistance <sup>b</sup> (dollars)		
		Families	Recipients		Total (thousands)	Monthly average per—	
			Total	Children		Family	Recipient
All areas.....		2,215,524	5,778,337	4,267,504	10,489,603	394.55	151.28
Alabama.....	11/15/96	18,874	45,059	36,200	29,627	130.81	54.79
Alaska.....	7/1/97	6,935	20,887	14,088	56,148	674.69	224.01
Arizona.....	10/1/96	33,034	84,458	64,568	105,293	265.62	103.89
Arkansas.....	7/1/97	11,971	28,704	21,542	41,202	286.83	119.62
California.....	11/26/96	488,667	1,262,274	972,116	3,771,362	643.14	248.98
Colorado.....	7/1/97	10,838	27,880	21,143	44,147	339.43	131.95
Connecticut.....	10/1/96	27,261	63,959	45,369	145,856	445.87	190.04
Delaware.....	3/10/97	5,856	12,181	8,689	17,480	248.76	119.59
District of Columbia.....	3/1/97	17,011	45,320	33,332	69,611	341.00	128.00
Florida.....	10/1/96	64,812	142,030	114,347	185,229	238.16	108.68
Georgia.....	1/1/97	51,839	125,476	98,559	141,888	228.09	94.23
Hawaii.....	7/1/97	14,086	45,851	33,546	87,930	520.21	159.81
Idaho.....	7/1/97	1,297	2,333	1,913	4,418	283.82	157.77
Illinois.....	7/1/97	77,740	234,071	179,025	191,068	204.82	68.02
Indiana.....	10/1/96	36,576	101,380	73,292	106,929	243.62	87.89
Iowa.....	1/1/97	19,799	52,758	35,808	76,493	321.95	120.82
Kansas.....	10/1/96	12,592	31,652	22,813	43,346	286.87	114.12
Kentucky.....	10/18/96	37,795	86,559	62,979	101,522	223.84	97.74
Louisiana.....	1/1/97	26,776	71,269	56,090	61,357	190.96	71.74
Maine.....	11/1/96	10,519	27,506	18,752	48,571	384.78	147.16
Maryland.....	12/9/96	29,055	71,283	52,592	108,376	310.84	126.70
Massachusetts.....	9/30/96	43,133	99,666	71,166	334,415	646.09	279.61
Michigan.....	9/30/96	71,529	198,012	147,027	303,599	353.70	127.77
Minnesota.....	7/1/97	38,691	114,232	80,058	191,570	412.61	139.75
Mississippi.....	10/1/96	15,049	34,013	26,846	26,294	145.60	64.42
Missouri.....	12/1/96	46,613	124,561	89,231	141,683	253.30	94.79
Montana.....	12/16/96	4,550	12,907	8,589	20,474	375.00	132.19
Nebraska.....	12/1/96	9,428	23,688	17,286	37,858	334.64	133.18
Nevada.....	12/3/96	6,452	16,438	12,347	22,428	289.68	113.71
New Hampshire.....	10/1/96	5,741	13,739	9,450	31,291	454.22	189.80
New Jersey.....	2/1/97	49,658	125,082	93,465	235,423	395.07	156.85
New Mexico.....	7/1/97	22,985	68,986	48,152	92,423	335.09	111.64
New York.....	12/2/96	249,788	694,950	473,867	1,445,449	482.23	173.33
North Carolina.....	1/1/97	45,056	97,746	75,094	116,798	216.03	99.58
North Dakota.....	7/1/97	2,888	7,477	5,435	12,872	371.43	143.46
Ohio.....	10/1/96	95,105	235,416	173,593	372,351	326.26	131.81
Oklahoma.....	10/1/96	14,195	35,488	27,579	38,861	228.14	91.25
Oregon.....	10/1/96	16,731	37,966	28,090	99,896	497.57	219.27
Pennsylvania.....	3/3/97	87,678	240,903	177,632	341,065	324.16	117.98
Rhode Island.....	5/1/97	16,058	44,255	30,501	83,953	435.68	158.08
South Carolina.....	10/12/96	17,526	41,559	31,744	31,632	150.40	63.43
South Dakota.....	12/1/96	2,778	6,656	5,414	9,330	279.85	116.82
Tennessee.....	10/1/96	56,594	146,801	107,100	118,043	173.82	67.01
Texas.....	11/5/96	129,453	346,753	255,492	296,851	191.09	71.34
Utah.....	10/1/96	8,127	21,203	15,355	35,309	362.07	138.77
Vermont.....	9/20/96	5,876	15,650	9,992	34,860	494.37	185.62
Virginia.....	2/1/97	30,731	69,315	50,942	89,970	243.97	108.17
Washington.....	1/10/97	55,646	148,444	101,973	297,504	445.53	167.01
West Virginia.....	1/11/97	12,621	33,466	22,939	44,985	297.01	112.02
Wisconsin.....	9/30/96	16,939	38,352	32,670	86,536	425.72	188.03
Wyoming.....	1/1/97	578	1,118	911	1,341	193.37	99.98
Outlying areas							
Guam.....	7/1/97	2,807	9,900	7,503	17,116	508.10	144.08
Puerto Rico.....	7/1/97	30,311	87,688	61,136	36,970	101.64	35.13
Virgin Islands.....	7/1/97	878	3,021	2,162	2,597	246.58	71.65

a. Transition from Aid to Families with Dependent Children (AFDC) to TANF reporting systems occurred July 1, 1997, or 6 months after TANF effective date, whichever was later.

b. TANF expenditures include cash payments and services.

SOURCE: Department of Health and Human Services.

CONTACT: Evelyn Mills (202) 401-4055.

## 9.G AFDC/TANF and Emergency Assistance

**Table 9.G2—Average monthly number of families and recipients of Temporary Assistance for Needy Families and total amount of assistance, by state or other area, 2001**

State or area	TANF effective date <sup>a</sup>	Average monthly number			Amount of assistance <sup>b</sup> (dollars)		
		Families	Recipients		Total (thousands)	Monthly average per—	
			Total	Children		Family	Recipient
All areas.....		2,103,542	5,362,817	3,987,194	10,124,437	401.09	157.32
Alabama.....	11/15/96	18,317	43,492	34,773	30,724	139.78	58.87
Alaska.....	7/1/97	5,893	17,192	11,652	49,481	699.72	239.84
Arizona.....	10/1/96	34,760	89,017	66,908	113,343	271.73	106.11
Arkansas.....	7/1/97	11,894	27,787	20,761	38,463	269.48	115.35
California.....	11/26/96	464,917	1,176,872	918,069	3,670,436	657.90	259.90
Colorado.....	7/1/97	10,864	27,786	21,006	45,350	347.86	136.01
Connecticut.....	10/1/96	25,711	59,024	41,895	139,655	452.64	197.17
Delaware.....	3/10/97	5,377	12,183	9,323	15,885	246.18	108.66
District of Columbia.....	3/1/97	16,171	42,883	31,478	66,283	341.57	128.80
Florida.....	10/1/96	58,217	122,554	99,738	172,273	246.60	117.14
Georgia.....	1/1/97	51,094	121,335	93,881	135,501	221.00	93.06
Hawaii.....	7/1/97	12,500	40,234	29,638	77,956	519.69	161.47
Idaho.....	7/1/97	1,303	2,268	1,886	4,461	285.32	163.94
Illinois.....	7/1/97	58,151	169,214	133,196	107,140	153.54	52.76
Indiana.....	10/1/96	43,308	121,481	87,042	144,013	277.11	98.79
Iowa.....	1/1/97	20,356	54,525	36,741	79,021	323.49	120.77
Kansas.....	10/1/96	13,266	33,630	23,975	46,918	294.73	116.26
Kentucky.....	10/18/96	35,754	80,674	59,405	100,286	233.74	103.59
Louisiana.....	1/1/97	24,728	63,997	50,805	68,990	232.50	89.84
Maine.....	11/1/96	9,548	25,768	17,730	44,327	386.87	143.35
Maryland.....	12/9/96	27,695	67,627	49,718	112,675	339.04	138.84
Massachusetts.....	9/30/96	43,399	100,661	71,736	294,433	565.36	243.75
Michigan.....	9/30/96	72,393	197,722	146,406	299,852	345.17	126.38
Minnesota.....	7/1/97	37,806	108,102	75,894	179,186	394.97	138.13
Mississippi.....	10/1/96	16,098	36,810	28,369	29,624	153.35	67.07
Missouri.....	12/1/96	45,483	120,980	86,487	137,208	251.39	94.51
Montana.....	12/16/96	5,174	14,666	9,681	26,484	426.56	150.48
Nebraska.....	12/1/96	9,679	24,181	17,791	39,625	341.14	136.56
Nevada.....	12/3/96	8,051	21,063	15,714	31,647	327.58	125.21
New Hampshire.....	10/1/96	5,730	13,676	9,411	33,220	483.11	202.43
New Jersey.....	2/1/97	44,307	110,494	82,753	209,528	394.09	158.02
New Mexico.....	7/1/97	18,161	51,116	36,879	69,457	318.72	113.24
New York.....	12/2/96	217,756	580,203	402,384	1,304,387	499.18	187.35
North Carolina.....	1/1/97	43,186	92,558	71,403	112,604	217.29	101.38
North Dakota.....	7/1/97	3,070	7,975	5,713	15,023	407.75	156.98
Ohio.....	10/1/96	83,918	194,617	145,080	324,848	322.58	139.10
Oklahoma.....	10/1/96	13,974	34,425	26,432	35,496	211.68	85.93
Oregon.....	10/1/96	16,649	37,554	27,943	105,605	528.59	234.34
Pennsylvania.....	3/3/97	81,997	213,559	157,368	425,017	431.94	165.85
Rhode Island.....	5/1/97	15,002	40,906	28,371	78,106	433.87	159.12
South Carolina.....	10/12/96	18,988	46,058	34,258	32,668	143.37	59.11
South Dakota.....	12/1/96	2,736	6,391	5,216	9,803	298.60	127.82
Tennessee.....	10/1/96	60,430	157,771	114,117	123,616	170.47	65.29
Texas.....	11/5/96	130,137	343,505	256,094	284,433	182.14	69.00
Utah.....	10/1/96	7,505	19,234	13,994	35,502	394.22	153.82
Vermont.....	9/20/96	5,407	14,314	9,171	32,680	503.67	190.26
Virginia.....	2/1/97	29,279	65,045	47,815	89,009	253.34	114.03
Washington.....	1/10/97	54,430	141,209	97,638	289,480	443.20	170.83
West Virginia.....	1/11/97	15,338	40,644	27,517	66,830	363.10	137.02
Wisconsin.....	9/30/96	17,915	41,109	34,373	93,094	433.05	188.72
Wyoming.....	1/1/97	507	945	785	1,162	191.12	102.52
Outlying areas							
Guam.....	7/1/97	2,887	10,035	7,166	17,477	504.40	145.13
Puerto Rico.....	7/1/97	25,635	73,287	51,785	32,041	104.16	36.43
Virgin Islands.....	7/1/97	692	2,465	1,836	2,108	253.76	71.25

a. Transition from Aid to Families with Dependent Children (AFDC) to TANF reporting systems occurred July 1, 1997, or 6 months after TANF effective date, whichever was later.

b. TANF expenditures include cash payments and services.

SOURCE: Department of Health and Human Services.

CONTACT: Evelyn Mills (202) 401-4055.

Table 9.H1—Number of persons participating, amount of benefits, and average benefit, fiscal years 1962–2001

Fiscal year	Average number of participants (thousands)	Annual benefit (thousands of dollars)	Annual average monthly benefit <sup>a</sup> (dollars)
1962	143	13,153	7.66
1963	226	18,639	6.87
1964	367	28,643	6.50
1965	424	32,494	6.39
1966	864	64,781	6.25
1967	1,447	105,455	6.07
1968	2,211	172,982	6.52
1969	2,878	228,587	6.62
1970	4,340	550,806	10.58
1971	9,368	1,522,904	13.55
1972	11,103	1,794,875	13.47
1973	12,190	2,102,133	14.37
1974	12,896	2,725,988	17.62
1975	17,063	4,386,144	21.42
1976	18,557	5,310,133	23.85
1977	17,058	5,057,700	24.71
1978	16,044	5,165,209	26.83
1979	17,710	6,484,538	30.51
1980	21,077	8,685,521	34.34
1981	22,430	10,615,964	39.44
1982 <sup>b</sup>	21,716	10,205,799	39.18
1983	21,630	11,153,867	42.98
1984	20,858	10,696,100	42.74
1985	19,910	10,744,200	44.99
1986	19,428	10,604,950	45.49
1987	19,113	10,500,344	45.78
1988	18,644	11,149,051	50.00
1989	18,766	10,676,436	51.85
1990	20,038	14,184,028	59.01
1991	22,629	17,307,235	63.89
1992	25,403	20,899,531	68.57
1993 <sup>c</sup>	26,982	22,006,031	67.96
1994 <sup>c</sup>	27,468	22,748,559	69.01
1995 <sup>c</sup>	26,619	22,765,478	71.27
1996	25,533	22,440,298	73.23
1997	22,851	19,555,263	71.31
1998	19,787	16,879,929	71.09
1999	18,123	15,761,615	72.23
2000	17,155	14,985,093	72.79
2001	17,313	15,546,941	74.83

a. That portion of the food stamp allotment, before the elimination of the purchase requirement, represented the government's share of total food stamps received. Since January 1979, only the bonus portion of the total food stamp allotment is received by participants.

b. Excludes participants and benefits under the Puerto Rico Nutrition Assistance Program after July 1, 1982.

c. Revised data.

SOURCE: Department of Agriculture, Food and Nutrition Service.

NOTE: Between 1974 and 1979, Supplemental Security Income (SSI) recipients were made ineligible for food stamps in California, Massachusetts, Wisconsin and selected counties in New York and Virginia because those areas supplemented SSI payments in amounts that included the value of food stamps. As of 1983 and 1992, SSI recipients were returned to the Food Stamp program in Massachusetts and Wisconsin, respectively, when those states chose to stop including a value for food stamps in the SSI supplement.

CONTACT: Jenny Genser (703) 305-2152.

## 9.J Low-Income Home Energy Assistance Program

**Table 9.J1—Number of households receiving home energy assistance, by type of assistance and state, fiscal year 2000**

State	Heating	Cooling	Energy crisis intervention		Low-cost residential weatherization/energy-related home repair
			Winter	Summer	
United States <sup>a</sup>	<sup>b</sup> 3,604,295	318,438	925,311	88,339	90,985
Alabama	38,396	31,752	8,339	14,669	643
Alaska	6,835	...	471	...	825
Arizona	<sup>b</sup> 16,486	<sup>c</sup> ...	5,190	...	476
Arkansas	31,112	5,602	10,225	2,453	825
California	<sup>b</sup> 89,471	<sup>c</sup> ...	32,174	...	17,058
Colorado	48,767	...	4,523	...	1,741
Connecticut	56,322	...	13,678	...	...
Delaware	10,215	2,145	2,807	...	231
District of Columbia	11,742	...	2,913	...	334
Florida	34,701	36,425	17,817	40,803	786
Georgia	76,101	27,137	...	...	873
Hawaii	<sup>b</sup> 5,095	<sup>c</sup> ...	...	1,080	...
Idaho	21,306	...	3,759	...	995
Illinois	94,819	52,515	9,484	...	975
Indiana	97,021	20,547	15,355	...	1,865
Iowa	62,052	...	1,888	369	1,412
Kansas	21,183	...	4,960	...	490
Kentucky	91,304	...	44,749	...	841
Louisiana	8,836	26,510	15,177	...	319
Maine	44,844	...	3,576	...	1,440
Maryland	60,551	...	<sup>d</sup> 4,848	4,848	175
Massachusetts	113,408	6,248	<sup>d</sup> 10,647	...	9,916
Michigan	295,772	...	40,279	...	3,483
Minnesota	84,122	...	12,802	...	638
Mississippi	22,487	16,038	2,314	...	...
Missouri	88,989	...	44,394	...	...
Montana	14,294	...	379	...	417
Nebraska	23,092	5,736	28,306	545	516
Nevada	7,844	4,314	...	12	...
New Hampshire	23,081	...	3,295	...	653
New Jersey	179,318	27,662	11,915	...	1,792
New Mexico	18,765	...	5,069	...	365
New York	676,804	...	126,772	...	11,696
North Carolina	146,873	...	123,169	...	2,028
North Dakota	11,293	...	1,109	...	738
Ohio	195,380	...	109,130	19,596	4,453
Oklahoma	52,680	8,468	1,443	...	417
Oregon	48,405	...	142	...	1,103
Pennsylvania	226,736	...	74,725	...	4,335
Rhode Island	19,176	...	10,770	...	470
South Carolina	48,213	...	20,831	3,509	694
South Dakota	11,546	...	401	...	444
Tennessee	44,598	12,059	6,916	...	1,705
Texas	18,508	24,259	42,649	...	3,591
Utah	25,615	...	911	...	349
Vermont	16,762	...	4,875	455	1,000
Virginia	82,910	11,021	4,919	...	1,538
Washington	47,115	...	1,866	...	1,733
West Virginia	38,248	...	12,353	...	1,027
Wisconsin	88,105	...	20,184	...	3,311
Wyoming	6,997	...	813	...	269

- a. An unduplicated total of households assisted cannot be derived from these data because the same household may be included under more than one type of assistance.
- b. Totals include households that received combined heating and cooling assistance in Arizona, and California; households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.
- c. Excludes households that received combined heating and cooling assistance in Arizona, and California; households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.
- d. Households in winter crisis situation received expedited heating assistance.

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

NOTE: ... = not applicable.

CONTACT: Leon Litow (202) 401-5304.

**Table 9.J1.1—Number of households receiving home energy assistance, by type of assistance, fiscal years 1982–2000**

Fiscal year	Heating	Cooling	Energy crisis intervention		Low-cost residential weatherization/energy-related home repair
			Winter	Summer	
1982.....	5,990,176	1,075,061	707,123	...	430,830
1983.....	6,414,448	529,036	972,894	25,342	482,620
1984.....	6,443,637	537,598	963,743	28,841	180,748
1985.....	6,545,616	511,333	857,809	27,196	217,864
1986.....	6,359,924	535,553	951,945	114,194	191,316
1987.....	6,495,409	366,721	1,060,425	60,797	172,372
1988.....	5,827,481	309,044	981,775	57,750	156,770
1989.....	5,595,268	126,977	890,616	20,384	142,584
1990.....	5,459,631	358,823	1,058,067	37,340	148,104
1991.....	5,769,346	374,483	1,004,634	39,399	127,587
1992.....	5,906,292	384,468	950,275	25,570	106,066
1993.....	5,282,993	143,279	956,435	47,169	111,295
1994.....	5,663,040	145,684	1,127,832	24,532	126,086
1995.....	5,147,619	341,041	932,263	77,915	102,817
1996.....	4,069,409	129,184	769,154	29,121	82,931
1997.....	4,069,409	129,184	769,154	19,121	82,931
1998.....	3,641,836	316,764	704,640	154,708	85,708
1999.....	3,338,720	532,619	757,410	315,470	84,106
2000.....	3,604,295	318,438	925,311	88,339	90,985

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

NOTES: An unduplicated total of households assisted cannot be derived from these data because the same households may be included under more than one type of assistance. Totals include households that received combined heating and cooling assistance in Arizona, and California; households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.  
 ... = not applicable.

CONTACT: Leon Litow (202) 401-5304.

## 9.J Low-Income Home Energy Assistance Program

**Table 9.J2—Low-income Home Energy Assistance Program funds: Federal net allocations and amounts carried over, by state, fiscal year 2000 (in dollars)**

State	Amount of regular federal allocation	Amount of supplemental federal allocation	Carried over to following fiscal year
United States <sup>a</sup> .....	1,059,828,175	731,648,623	58,888,497
Alabama .....	9,159,178	10,863,820	1,073,146
Alaska .....	4,186,744	4,955,588	583,990
Arizona .....	4,091,692	1,607,543	00
Arkansas .....	7,026,837	4,138,358	257,949
California .....	49,063,305	24,742,717	0
Colorado .....	17,200,336	7,937,927	2,020,560
Connecticut .....	22,471,059	20,713,185	3,182,648
Delaware .....	2,982,600	3,529,994	538,774
District of Columbia .....	3,489,792	1,682,544	243,916
Florida .....	14,565,607	5,999,663	999,994
Georgia .....	11,520,809	11,026,132	1,356,835
Hawaii .....	1,160,209	329,035	14,898
Idaho .....	6,608,837	2,423,380	147,758
Illinois .....	62,196,011	29,651,762	0
Indiana .....	28,153,942	12,921,449	0
Iowa .....	19,957,799	9,906,843	1,813,863
Kansas .....	9,155,802	4,365,000	0
Kentucky .....	14,654,685	6,434,640	0
Louisiana .....	9,414,701	8,249,734	0
Maine .....	14,025,580	22,314,824	528,033
Maryland .....	17,205,806	12,510,589	0
Massachusetts .....	44,931,579	44,153,889	2,999,768
Michigan .....	58,803,782	28,622,910	5,619,446
Minnesota .....	42,541,940	21,179,227	421,769
Mississippi .....	7,882,021	7,370,750	57,321
Missouri .....	24,843,515	11,532,159	2,632,587
Montana .....	6,687,755	2,848,440	0
Nebraska .....	9,863,898	4,736,587	954,144
Nevada .....	2,091,695	816,470	91,713
New Hampshire .....	8,508,035	12,329,240	88,768
New Jersey .....	41,624,347	42,372,178	4,349,000
New Mexico .....	5,157,728	2,380,284	404,367
New York .....	136,008,341	128,249,579	13,323,554
North Carolina .....	19,549,300	14,949,481	0
North Dakota .....	6,827,513	3,338,823	1,227,799
Ohio .....	55,021,668	25,532,250	2,995,118
Oklahoma .....	7,792,742	3,536,921	40,589
Oregon .....	13,241,364	4,529,229	817,785
Pennsylvania .....	73,186,585	61,658,347	7,723,814
Rhode Island .....	7,377,989	8,992,459	0
South Carolina .....	7,313,755	6,523,566	0
South Dakota .....	5,716,877	3,197,979	0
Tennessee .....	14,844,882	6,205,754	0
Texas .....	24,241,701	24,693,430	0
Utah .....	7,858,682	3,706,660	848,169
Vermont .....	6,377,075	6,174,944	1,052,263
Virginia .....	20,958,595	14,515,996	427,870
Washington .....	21,086,620	6,998,350	50,289
West Virginia .....	9,698,117	4,060,988	0
Wisconsin .....	38,293,855	18,690,537	0
Wyoming .....	3,204,888	1,446,469	102,877

a. Net of set-asides to direct-grant Indian tribes and tribal organizations and the insular areas.

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

CONTACT: Leon Litow (202) 401-5304.



9.J Low-Income Home Energy Assistance Program

Table 9.J2.1—Low-income Home Energy Assistance Program funds: Federal net allocations and amounts carried over, fiscal years 1982–2000 (in dollars)

Fiscal year	Amount of regular federal allocation	Amount of supplemental federal allocation	Carried over to following fiscal year
1982 .....	1,855,265,713	123,000,000	167,622,219
1983 .....	1,954,327,406	0	126,734,742
1984 .....	2,052,395,279	2,200,000	160,512,007
1985 .....	2,078,044,805	0	103,191,230
1986 .....	1,988,842,779	0	100,034,095
1987 .....	1,804,751,604	0	128,664,885
1988 .....	1,516,388,203	0	76,987,683
1989 .....	1,369,642,868	0	68,307,592
1990 .....	1,379,023,013	49,700,470	53,923,488
1991 .....	1,400,498,244	193,443,923	73,292,715
1992 .....	1,460,448,621	24,431,796	78,189,483
1993 .....	1,307,182,655	23,663,576	36,828,086
1994 .....	1,397,090,175	322,170,703	91,639,371
1995 .....	1,855,265,713	123,000,000	167,622,219
1996 .....	867,303,740	178,061,574	81,479,264
1997 .....	964,896,037	211,876,438	59,564,206
1998 .....	964,167,635	150,896,688	55,654,317
1999 .....	1,060,819,242	174,599,382	42,151,190
2000 <sup>a</sup> .....	1,059,828,175	731,648,623	58,888,497

a. Net of set-asides to direct-grant Indian tribes and tribal organizations and the insular areas.

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

CONTACT: Leon Litow (202) 401-5304.

## 9.J Low-Income Home Energy Assistance Program

**Table 9.J3—Estimated home energy assistance obligations, by type of assistance, and state, fiscal year 2000 (in dollars)**

State	Heating assistance benefits	Cooling assistance benefits	Crisis assistance benefits	Weatherization assistance benefits
United States .....	<sup>a</sup> 818,811,085	<sup>b</sup> 72,445,852	249,906,169	158,628,023
Alabama .....	5,057,246	5,301,358	3,668,825	700,999
Alaska .....	4,378,047	...	313,064	<sup>c</sup> 3,510,865
Arizona .....	<sup>a</sup> 2,437,174	...	768,120	596,149
Arkansas .....	3,430,504	558,821	2,107,775	1,301,372
California .....	<sup>a</sup> 24,466,678	...	20,551,144	19,842,880
Colorado .....	16,282,346	...	741,125	2,403,941
Connecticut .....	25,793,926	...	4,721,599	...
Delaware .....	2,475,566	451,100	541,741	976,890
District of Columbia .....	2,410,867	...	321,178	627,950
Florida .....	4,033,065	2,118,153	8,222,185	1,930,409
Georgia .....	8,860,773	4,212,039	...	1,728,121
Hawaii .....	1,233,279	<sup>b</sup> .....	92,626	...
Idaho .....	3,516,734	...	1,073,953	1,511,044
Illinois .....	31,254,373	8,299,663	2,689,041	1,314,564
Indiana .....	24,513,163	558,576	1,666,638	3,399,771
Iowa .....	14,723,811	...	1,032,331	3,306,401
Kansas .....	7,851,772	...	1,992,822	2,328,919
Kentucky .....	8,514,968	...	4,193,528	1,979,733
Louisiana .....	1,801,541	5,404,626	7,424,626	1,412,204
Maine .....	23,615,093	...	778,232	4,040,698
Maryland .....	21,348,585	...	<sup>d</sup> 500,000	440,000
Massachusetts .....	49,195,446	2,850,346	5,014,311	4,536,061
Michigan .....	46,264,148	...	<sup>d</sup> 9,522,484	976,125
Minnesota .....	33,985,357	...	6,665,237	1,988,479
Mississippi .....	9,660,999	3,236,272	557,682	...
Missouri .....	16,423,409	...	11,192,825	...
Montana .....	5,245,695	...	236,339	1,704,167
Nebraska .....	3,969,273	511,807	4,243,239	1,160,632
Nevada .....	1,055,326	1,032,000	1,906	...
New Hampshire .....	14,000,554	...	652,784	1,153,310
New Jersey .....	47,645,967	2,800,000	5,600,000	3,585,000
New Mexico .....	3,480,187	...	712,810	834,992
New York .....	99,816,780	...	59,996,724	32,892,917
North Carolina .....	12,995,982	...	15,749,609	2,988,114
North Dakota .....	5,287,548	...	1,496,841	1,800,000
Ohio .....	29,299,022	...	19,486,341	5,538,351
Oklahoma .....	4,968,369	1,173,450	851,510	700,964
Oregon .....	9,970,424	...	46,648	2,979,307
Pennsylvania .....	63,373,566	...	18,561,434	10,563,968
Rhode Island .....	7,944,003	...	2,039,598	2,031,178
South Carolina .....	7,537,013	...	3,312,423	1,714,827
South Dakota .....	5,332,922	...	49,961	857,249
Tennessee .....	11,149,500	2,914,629	1,729,000	2,105,750
Texas .....	6,448,699	27,691,470	3,793,352	3,689,484
Utah .....	5,620,367	...	654,992	1,272,253
Vermont .....	6,339,920	...	1,606,126	1,170,000
Virginia .....	21,950,738	3,331,542	1,962,832	4,281,573
Washington .....	16,187,566	...	898,849	3,535,619
West Virginia .....	5,308,080	...	2,603,986	2,319,187
Wisconsin .....	28,091,879	...	7,110,895	8,030,866
Wyoming .....	2,262,835	...	154,878	864,740

- a. Includes funds for households that received combined heating and cooling assistance in Arizona, and California; households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.
- b. Excludes funds for households that received combined heating and cooling assistance in Arizona, and California; households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.
- c. Includes \$1.9 million in state funds.
- d. Excludes funds for households that received expedited heating assistance for winter crisis situations.

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

NOTES: Includes federal LIHEAP appropriated funds and non-federal funds operated through the LIHEAP program.

... = not applicable.

CONTACT: Leon Litow (202) 401-5304.

9.J Low-Income Home Energy Assistance Program

**Table 9.J3.1—Estimated home energy assistance obligations, by type of assistance, fiscal years 1982–2000 (in dollars)**

Fiscal year	Heating assistance benefits	Cooling assistance benefits	Crisis assistance benefits	Weatherization assistance benefits
1982	1,124,476,630	51,498,572	138,941,133	136,195,046
1983	1,343,267,155	33,020,830	191,771,756	195,463,612
1984	1,372,772,591	32,374,067	225,795,893	186,662,906
1985	1,466,721,924	29,135,118	191,407,205	227,096,051
1986	1,351,903,078	35,620,945	199,178,003	193,420,839
1987	1,280,302,113	29,581,262	197,719,071	220,419,633
1988	1,145,560,993	21,151,405	190,046,023	170,292,505
1989	1,017,024,757	12,341,113	187,442,779	147,952,928
1990	1,030,150,903	25,007,676	188,844,316	133,479,484
1991	1,098,583,280	27,416,776	220,795,517	129,279,737
1992	990,903,081	22,645,002	197,218,623	134,816,010
1993	948,596,196	22,274,975	183,189,522	146,444,590
1994	1,062,552,111	24,862,635	225,583,805	214,342,289
1995	884,846,144	43,883,481	212,713,182	159,076,150
1996	696,801,144	17,597,204	167,622,219	135,835,358
1997	749,704,757	18,755,118	176,095,176	153,589,045
1998	633,618,243	62,178,981	212,043,081	138,217,577
1999	684,600,568	72,294,009	210,175,301	145,039,987
2000	818,811,085	72,445,852	249,906,169	158,628,023

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

NOTE: Includes federal LIHEAP appropriated funds and non-federal funds operated through the LIHEAP program.

CONTACT: Leon Litow (202) 401-5304.



## Appendix A: Sampling Variability

A substantial number of tables in sections 5 and 6 present 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.B12 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 Tables A.2 and A.3 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.

**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

**Appendix A: Sampling Variability**

**Table A.2— Approximations of standard errors of estimated percentage of persons from 1 percent file**

Size of base (inflated)	2 or 98	5 or 95	10 or 90	25 or 75	50
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

a. Less than 0.05 percent.

**Table A.3— Approximations of standard errors of estimated percentage of persons from 10 percent file**

Size of base (inflated)	2 or 98	5 or 95	10 or 90	25 or 75	50
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

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 based on the OASDI 1 percent sample do not count the secondary benefit as an award when both benefits are paid from the same trust fund.

When dual entitlements are counted as awards, the number of awardees is increased and the monthly amount awarded is lowered. The person has already been counted as having received an award when he or she became entitled to the retired-worker benefit, and is counted again upon entitlement to the secondary benefit. The average benefit amount is lowered because the amount recorded for the award for the dually entitled person is only the difference between the amount of the retired-worker benefit and the amount of the secondary benefit.

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## Appendix C: Poverty Data

Table 3.E1 presents weighted average poverty thresholds for families in the United States for 1959–2001. Table 3.E2 presents data on the number and percent of people in poverty in the United States for 1959–2000. Tables 3.E3, 3.E4, and 3.E6 present more detailed data on people and families in poverty in the United States during 2000. (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 1965–2002. (Poverty guidelines are issued by the U.S. Department of Health and Human Services.)

Poverty thresholds are used primarily for statistical purposes—producing 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 thresholds and guidelines are sets of dollar figures which vary by family size and (in the case of the thresholds) family composition.

The poverty thresholds were developed in 1963–1964 by Mollie Orshansky of the Social Security Administration as a measure of income inadequacy. The poverty definition was modified in 1969 and 1981 by federal interagency committees. The thresholds were based on food expenditure/income patterns (from the Department of Agriculture's 1955 Household Food Consumption Survey) and the costs of the Department of Agriculture's economy food plan for families of different sizes and compositions. (See Joseph Dalaker, U.S. Census Bureau, "Poverty in the United States: 1998," *Current Population Reports: Consumer Income*, Series P60-207, September 1999, Appendix A, for an explanation of the poverty definition.) While 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*, Series P-23, No. 28, August 1969; and Directive No. 14, "Definition of Poverty for Statistical Purposes," *Statistical Policy Handbook*, U.S. Department of Commerce, Office of Federal Statistical Policy and Standards, 1978.)

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 (rounded to the nearest multiple of \$20).

The poverty thresholds were calculated using data (the 1955 Household Food Consumption Survey) that defined income as after-tax money income; accordingly, the thresholds were intended to be applied to data on money income. The National Research Council's Panel on Poverty and Family Assistance put great emphasis on the principle of consistency in poverty measurement—that the definition of family resources (income) used should be consistent with the concept underlying the poverty thresholds. (For a discussion of this principle, see *Measuring Poverty: A New Approach*, Constance F. Citro and Robert T. Michael (eds.), Washington, D.C., National Academy Press, 1995, pp. 4, 9-10, 37-40, 65-66, 98, 203-206, and 227-231. This important report proposed a new approach for developing an official poverty measure for the United States.) According to the Panel's principle of consistency, it would be inappropriate to apply the current poverty thresholds (calculated using an income definition of after-tax money income) to an income distribution that used an income definition of money income plus selected noncash benefits.

As noted above, the poverty thresholds were developed in 1963–1964 by Mollie Orshansky of the Social Security Administration. In May 1965—just over a year after the Johnson Administration had initiated the War on Poverty—the Office of Economic Opportunity adopted Orshansky's thresholds as a working or quasi-official definition of poverty. At that time, the thresholds comprised a matrix of 124 detailed poverty thresholds based on the total number of family members, the number of family members who were related children under age 18, the sex



of the family householder, the age of the individual or family householder (for one- and two-person units only), and whether the family lived on a farm.

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: Consumer Income*, Series P-60, No. 133, July 1982, pp. 2-5, 9, and 186.) As a result of these changes, the current matrix of poverty thresholds used by the Census Bureau to determine the poverty status of families and unrelated individuals consists of a set of 48 detailed thresholds arranged in a two-dimensional matrix by family size (number of family members, ranging from one person, that is, an unrelated individual, to nine or more persons) cross-classified by the presence and number of family members who are related children under age 18 (from no children to eight or more children present). Unrelated individuals and two-person families are further differentiated by the age of the individual or family householder (under age 65 and aged 65 or older).

The current official definition of poverty is over 30 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, D.C., National Academy Press, 1995. In the report, the Panel proposed a new approach for developing an official poverty measure for the United States—although it did not propose a specific set of dollar figures. The Panel's proposed approach focused on three major areas: new poverty thresholds, a new and consistent definition of family resources (income), and data sources.

In July 1999, the Census Bureau, in collaboration with the Bureau of Labor Statistics, released a report, *Experimental Poverty Measures: 1990 to 1997 (P60-205)* that examined the effects of different resource definitions and thresholds on poverty and which estimated several experimental poverty rates based on the NRC panel's recommendations. That report and subsequent updates are available on the Census Bureau poverty measurement Web page at: [www.census.gov/hhes/www/povmeas.html](http://www.census.gov/hhes/www/povmeas.html).

Data on the poverty population and on family and personal income are collected in the March Current Population Survey (CPS). Data from the March survey are also known as the Annual Demographic File. Following the standard Census Bureau definition, the family is defined as two or more persons related by birth, marriage, or adoption and residing together. "Income" refers to money income from all sources, including public income transfers, but before federal, state, or local personal income taxes. 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 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. A summary of these changes and references for more information about them appear below. 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 Welniak, Edward, "Effects of the March Current Population Survey's New Processing System on Estimates of Income and Poverty," *Proceedings of the American Statistical Association*, 1990.

## Appendix C: Poverty Data

Further details about CPS methodology may be found in Technical Paper 63RV, available at [www.bls.census.gov/cps/tp/tp63.htm](http://www.bls.census.gov/cps/tp/tp63.htm).

If you need to find additional poverty data, you may browse the U.S. Census Bureau poverty Web site at [www.census.gov/hhes/www/poverty.html](http://www.census.gov/hhes/www/poverty.html), or contact the U.S. Census Bureau's Housing and Household Economic Statistics Division Information Staff at (301) 763-3242, or

email [hhes-info@census.gov](mailto:hhes-info@census.gov).

For further information about technical changes to the poverty measure, contact Joe Dalaker at (301) 763-3213 or e-mail [joseph.dalaker@census.gov](mailto:joseph.dalaker@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 1963–1964.	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
1976–1987	For wide income intervals, Pareto interpolation was used to compute median income. Before 1976 and after 1987, linear interpolation was used.	P60-166 p. 93
1979	"Householder" concept first implemented, replacing "head" concept—the husband is no longer automatically the family reference person. Secondary families (people who are related to each other but not the householder) are tallied separately from "families."  Change in universe—income questions no longer asked of 14-year-olds. Poverty universe changed—people under age 15 not living with any family members are excluded. (Previously, unrelated individuals under age 14 were excluded.)	P60-130 pp. 6-10
1980	Modification of poverty measure (final approval in 1981). Estimates weighted using 1980 Census results.	P60-133 pp. 2–7
1987	New CPS processing system.	P60-166 pp. 1, 14-17 Welniak, 1990 ASA proceedings
1988	Linear interpolation used to compute median incomes.	P60-166 p.93
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, D-3 P60-194 p. v, xiii, D-3
1995	Revised edit and allocation procedures for race groups.	P60-194 pp. v, 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

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## Appendix D: Computing a Retired-Worker Benefit

This section provides instructions and a worksheet for computing a retired-worker benefit. The worksheet can be used for persons born in 1927 through 1940—that is, those who attained age 62 in 2002 or earlier and were under age 75 at the end of 2002. 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 five 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 which 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 age 62 in 2002, actual earnings in 1984 of \$20,000 are indexed to \$39,857.06, based on 2000 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 age 65. The benefit formula is weighted to provide a higher replacement of earnings for lower wage workers. The formula for persons age 62 in 2002 is 90 percent of the first \$592 of AIME; plus 32 percent of the next \$2,975; plus 15 percent of the AIME over \$3,567.
- *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 (65 and 6 months in the year 2002 but scheduled to increase to age 67 by the year 2022), plus 5/12 of 1 percent for each of up to 24 earlier months. For a person aged 62 in 2002, the maximum reduction is 22.5 percent if the individual is entitled to benefits for all 42 months between 62 and 65 and 6 months.

- *To provide for price indexing after age 62.* Benefits are adjusted annually in December to reflect increases in the consumer price index (CPI-W). The 2001 benefit increase was 2.6 percent. These cost-of-living adjustments are applied to the benefit for each year after the person attained age 62—even if the person was not actually receiving benefits.
- *To give credit for earnings after age 61.* Earnings after age 61 (which are not indexed) can be substituted for earnings in earlier years if they result in a higher benefit. In addition, persons who do not receive benefits between ages 65 and 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 prior to 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 prior to attainment of age 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 2002. The indexing year is 2000. The average annual wage for 2000 was \$32,154.82. The average annual wage for 1990 was \$21,027.98. The amount, \$32,154.82 divided by \$21,027.98, yields a factor of 1.5291445.

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. For example, actual covered earnings of \$10,000 in 1990, multiplied by 1.5291445, result in indexed earnings of \$15,291.45; actual earnings of \$51,300 (the maximum creditable) result in indexed earnings of \$78,445.11.

**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 2002, 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 3 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 ten cents.

For retired workers who attained age 62 in 2002, the bend points are \$592 and \$3,567. Thus the formula is 90 percent of the first \$592 of AIME; plus 32 percent of next \$2,975 of AIME; plus 15 percent of AIME above \$3,567. 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 \$648

Based on: 90 percent of \$592 (\$532.80); plus  
32 percent of \$360 (\$115.20)

Example 3 - AIME of \$3,700

PIA is \$1,504.75 rounded to \$1,504.70

Based on: 90 percent of \$592 (\$532.80); plus  
32 percent of \$2,975 (\$952.00); plus  
15 percent of \$133 (\$19.95)

The above calculations are applicable to workers who attain age 62 in 2002. 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 the year 2002. Worksheet 2 shows cost-of-living increase factors for 1979 through 2002. After the PIA is calculated for the year of attainment of age 62, cost-of-living increases are applied for each year through 2001. The result is the current 2002 PIA.

For example, a worker who attained age 62 in 1999 would receive cost-of-living adjustments for the years 1999–2001. The adjustments are cumulative, with each step rounded to the next lower dime. If the age 62 PIA was \$500, the cost-of-living adjustments would be:

1999: \$500 multiplied by 1.025 = \$512.50

2000: \$512.50 multiplied by 1.035 = \$530.40

2001: \$530.40 multiplied by 1.026 = \$544.10

\$544.10 would be the PIA effective December 2001.

**Step 5 - Computation of the Monthly Benefit**

The full PIA is payable to a worker who retires at age 65. However, beginning in the year 2000, the full retirement age, 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 age 62 in 2002 have their benefits computed based on the full retirement age of 65 and 6 months. Worksheet 3 may be used to determine the full retirement age based on the year of birth as well as the reduction factors. For individuals electing benefits at exactly age 62 in the year 2002, the maximum reduction is 22.5 percent.

For example, in 2002 a worker with a PIA of \$500 would receive \$387.50 at age 62. The PIA is reduced by \$112.50, 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 6 months for a total reduction of 22.5 percent. After reduction of the PIA by \$112.50, 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 1989–2002)**

<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 2001. 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 1989-2002.)	
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 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 based on 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 based on 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 based on 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 next lower dime to obtain your PIA at age 62. Continue with line 38.	
38	If you attained age 62 in 2002, 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 2001 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.	

**Appendix D: Computing a Retired-Worker Benefit****Instructions for computing a retired-worker benefit (only for workers attaining age 62 in years 1989–2002)—Continued**

41	Place an "X" in column 5 (Worksheet 2) next to each subsequent year through 2001.	
42	Enter your age 62 PIA from either line 24, 30, or 37—here and in shaded box in column 6, Worksheet 2.	
43	Beginning with first year marked, multiply your age 62 PIA by the corresponding factor (column 4), round to lower dime, and enter in column 6. The resulting PIA is then multiplied by the next factor and is again rounded to lower dime. Continue this process through 2001. Enter this last figure, which is your current PIA.	
<b>STEP 5.—Computing the Monthly Benefit</b>		
44	Enter your current PIA from either line 24, 30, 37, or 43.	
45	Using Worksheet 3, determine your full retirement age and enter here.	
46	If you retired at your full retirement age round PIA from line 44 to 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 percentage reduction for the first 36 months.	
53	Multiply line 49 by line 51 to obtain the percentage reduction for months in excess of 36.	
54	Add lines 52 and 53 to obtain the total percentage 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 next lower dollar to obtain your monthly benefit.	

Worksheet 1: Indexing of earnings

1 Year	2 Your earnings	3 Maximum taxable earnings	4 Lower of columns 2 or 3	5 Indexing factor	6 Column 4 times column 5	7 Highest indexed earnings
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				

Worksheet 2: Computing the primary insurance amount (PIA) for workers retiring after age 62

Year	1 1st bend point	2 2nd bend point	3 Cost-of-living increase	4 Cost-of-living factor	5	6
						Age 62
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	...	...		

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 P.L. 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.

## Appendix D: Computing a Retired-Worker Benefit

### Worksheet 3: Determining the full retirement age

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

a. If your birthday is January 1, refer to previous year.

b. The monthly reduction factor for the first 36 months is 0.0055556 and 0.0041667 for additional months.

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## Glossary

<b>actuarial reduction (OASDI)</b>	Reduction in monthly benefit amount payable on— <ol style="list-style-type: none"><li>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</li><li>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.))</li></ol>
<b>administrative law judge (ALJ)</b>	An official of the Social Security Administration's (SSA's) Office of Hearings and Appeals 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. Also <b>see administrative review process</b> .
<b>administrative review process (OASDI and SSI)</b>	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. <ol style="list-style-type: none"><li>1. <i>Initial determination</i>. 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.</li><li>2. <i>Reconsideration</i>. 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.</li><li>3. <i>Hearing before an administrative law judge (ALJ)</i>. 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.</li><li>4. <i>Appeals Council review</i>. When an individual disagrees with the decision or dismissal of 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 Hearings and Appeals, may deny or dismiss the request for review, or it may 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 <b>expedited appeals process</b> and <b>federal court review</b>.</li></ol>
<b>adult (SSI)</b>	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.
<b>age (OASDI)</b>	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.

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	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.
<b>aged beneficiary (OASDI)</b>	A person who qualifies for benefits on the basis of age rather than on the basis of caring for a child or disability.
<b>aged enrollee (Medicare)</b>	An individual, aged 65 or older, who is enrolled in the Medicare program.
<b>aged person (SSI)</b>	A person aged 65 or older.
<b>allowance (DI)</b>	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.
<b>allowed charge (Medicare)</b>	An individual charge determined (approved amount) by a carrier for a covered medical service or supply.
<b>annual maximum taxable limit (OASDI and HI)</b>	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.
<b>assigned claim (Medicare)</b>	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.
<b>auxiliary benefit (OASDI)</b>	Monthly benefit payable to a spouse or child of a retired or disabled worker, or to a survivor of a deceased worker.
<b>average</b>	See <b>mean</b> .
<b>average indexed monthly earnings—AIME (OASDI)</b>	<p>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.</p> <p>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—</p> <ol style="list-style-type: none"> <li>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);</li> </ol>

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2. Selecting the actual computation years, based on highest indexed earnings from any years after 1950; and
  3. Dividing the sum of indexed earnings in the computation years by the total number of months in the computation years.

For workers entitled to disability benefits after June 1980, the number of dropout years varies 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 1979–83 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.

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<b>base years (OASDI)</b>	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.
<b>bend points (OASDI)</b>	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.
<b>beneficiary (OASDI)</b>	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.
<b>benefit period (Medicare)</b>	An alternate name for "spell of illness."
<b>benefit reduction (OASDI)</b>	See <b>actuarial reduction</b> .
<b>benefit termination (OASDI)</b>	See <b>termination</b> .
<b>benefits in force (OASDI)</b>	The sum of the number of persons with benefits in current-payment status and persons with benefits withheld.
<b>benefits withheld (OASDI)</b>	See <b>withholding</b> .
<b>blind (OASDI and SSI)</b>	"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).
<b>Black Lung Benefits Program</b>	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.
<b>buy-in (Medicare)</b>	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.
<b>capitation (Medicare)</b>	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.
<b>carrier (Medicare)</b>	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.
<b>child (SSI)</b>	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.
<b>childhood disability benefit (OASDI)</b>	See <b>disabled child's benefit</b> .
<b>child's benefit (OASDI)</b>	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

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	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.
<b>claimant (OASDI and SSI)</b>	The person on whose behalf an application for benefits is filed.
<b>coinsurance (Medicare)</b>	See <b>cost-sharing</b> .
<b>computation starting date (OASDI)</b>	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 Dec. 31, 1950 is applicable in computing average indexed monthly earnings).
<b>consumer price index (CPI)</b>	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).
<b>continuing disability review (DI and SSI)</b>	A periodic review to determine if a disabled individual is still medically eligible to receive benefits.
<b>contributions (OASDI and Medicare)</b>	The amount based on a percentage of earnings, up to an annual maximum, that must be paid by— <ol style="list-style-type: none"> <li>1. Employers and employees on wages from employment under FICA (Federal Insurance Contributions Act),</li> <li>2. The self-employed on net earnings from self-employment under SECA (Self-Employment Contributions Act), and</li> <li>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.</li> </ol> <p>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.</p>
<b>conversion of benefits (OASDI)</b>	See <b>awards (OASDI)</b> .
<b>cost-of-living adjustment (COLA)</b>	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.
<b>cost sharing (Medicare)</b>	The generic term that includes copayments, coinsurance, and deductibles. See also, <b>out-of-pocket expenses</b> . <p><i>Copayments</i>—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 filing of a prescription.</p> <p><i>Coinsurance</i>—Portion of the costs paid by the beneficiary after meeting the annual deductible.</p> <p><i>Deductibles</i>—The annual amount payable by the beneficiary for covered services before Medicare makes reimbursement.</p>
<b>couple (SSI)</b>	See <b>eligible couple</b> .
<b>covered earnings (OASDI)</b>	Earnings in employment covered by the OASDI programs.
<b>covered employment (OASDI)</b>	All employment and self-employment creditable for Social Security purposes.

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<b>covered worker (OASDI)</b>	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.
<b>current-payment status (OASDI)</b>	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.
<b>deductible (Medicare)</b>	<p>The amount paid by enrollees for covered services before Medicare makes reimbursements.</p> <p><i>Hospital Insurance</i>—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.</p> <p><i>Supplementary Medical Insurance</i>—Deductible is the first \$100 of covered charges per calendar year.</p>
<b>deeming (SSI)</b>	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.
<b>delayed retirement credit (OASDI)</b>	<p>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 apply for benefits beginning January of the year following the year the individual attains full retirement age.</p> <p>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.</p>
<b>dependents benefit (OASDI)</b>	Monthly benefit payable to a spouse or child of a retired or disabled worker.
<b>diagnosis-related groups (Medicare)</b>	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.
<b>diagnostic group (OASDI and SSI)</b>	Classification of medical conditions, by body system, and identifies the medical condition(s) on which disability-related benefits are based. Prior to 1985, the coding of the primary and secondary diagnoses for OASDI and SSI claimants was in accordance with the <i>International Classification of Diseases, 9th Revision, Clinical Modification (ICD-9-CM)</i> , using 4-digit ICD-9 codes. In 1985, the Social Security Administration implemented a

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	<p>revised method to determine and enter impairment codes on administrative records. This revised approach provides for a modified impairment coding system, using three digits (followed by zero), loosely based on ICD-9. For research purposes, ICD-9 codes and SSA impairment codes are, typically, not identical. However, the diagnostic groupings shown in the statistical tables closely parallel the major ICD-9 disease classifications.</p>
<b>direct deposit (OASDI and SSI)</b>	A method of payment whereby beneficiaries have their monthly benefits sent electronically to financial institutions they designate.
<b>disability (DI)</b>	<p>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.</p> <p>The law generally requires that a person be disabled continuously for 5 months before he or she can qualify for a disabled-worker benefit.</p>
<b>disability (SSI)</b>	<p>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.</p> <p>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.</p>
<b>disabled child's benefit (OASDI)</b>	A monthly benefit payable to a disabled person aged 18 or older—a son, daughter, or eligible grandchild of retired, deceased, or disabled worker—whose disability began before age 22. (Also referred to as "disabled adult child.")
<b>disabled enrollee (Medicare)</b>	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.
<b>disabled surviving divorced husband's benefit (OASDI)</b>	See <b>widow(er)'s benefit</b> .
<b>disabled surviving divorced wife's benefit (OASDI)</b>	See <b>widow(er)'s benefit</b> .
<b>disabled widow(er)'s benefit (OASDI)</b>	See <b>widow(er)'s benefit</b> .
<b>disabled-worker benefit (DI)</b>	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.
<b>divorced husband's benefit (OASDI)</b>	See <b>husband's benefit</b> .
<b>divorced wife's benefit (OASDI)</b>	See <b>wife's benefit</b> .
<b>drug addiction and alcoholism (OASDI and SSI)</b>	Legislation enacted in 1996 eliminated drug addiction and alcoholism (DA&A) as a basis for entitlement to Social Security and SSI disability benefits, effective Jan. 1, 1997. Individuals for whom drugs and/or alcohol

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	is deemed a contributing factor material to the determination of disability cannot be entitled to disability benefits.
<b>dual entitlement (OASDI)</b>	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.
<b>durable medical equipment (Medicare)</b>	Includes certain medical supplies and such items as hospital beds and wheel chairs used in a patient's home.
<b>early retirement (OASDI)</b>	Retirement prior to the full retirement age.
<b>earnings (OASDI and Medicare)</b>	All wages from employment and net earnings from self-employment, whether or not taxable or covered.
<b>earnings test (OASDI)</b>	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.
<b>eligible couple (SSI)</b>	Two persons living together as married, both of whom are eligible for SSI.
<b>eligible individual (SSI)</b>	An aged, blind, or disabled person eligible for SSI.
<b>eligible worker (OASDI)</b>	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.
<b>emergency advance payments (SSI)</b>	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.
<b>end stage renal disease (Medicare)</b>	Permanent kidney failure.
<b>entitlement (OASDI)</b>	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 <b>dual entitlement</b> .
<b>expedited appeals process (OASDI and SSI)</b>	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 <b>administrative review process</b> .



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<b>family benefit (OASDI)</b>	The sum of the individual monthly benefits payable to all the beneficiaries entitled on the basis of a single earnings record. See <b>maximum family benefit</b> .
<b>family classification (OASDI)</b>	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.
<b>father's benefit (OASDI)</b>	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.
<b>federal benefit rates (SSI)</b>	The basic benefit standards used in computing the amount of federal SSI payments. Benefit levels differ for individuals and couples living in households and for persons in Medicaid institutions. Individuals or couples living in their own households receive the full federal benefit. The federal benefit is reduced by one-third, if an individual or couple is living in another person's household and receiving support and maintenance there. The federal benefit rates are increased annually to reflect increases in the cost of living.
<b>federal court review (OASDI and SSI)</b>	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 <b>administrative review process</b> .
<b>federally administered payments (SSI)</b>	Federal SSI payments and state supplementation payments issued by the Social Security Administration on behalf of the states.
<b>federally administered state supplementation (SSI)</b>	Cash payments provided by a state and issued by the Social Security Administration, which is also responsible for the maintenance of payment records. See <b>state supplementation</b> .
<b>Food Stamp Program</b>	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.
<b>full retirement age (OASI)</b>	The age at which a person may first become entitled to unreduced retirement benefits. For persons reaching age 62 before 2000, the full retirement age is 65. It will increase gradually to 67 for persons reaching that age in 2027 or later, beginning with an increase to 65 years and 2 months for persons reaching age 65 in 2003. The higher full retirement age affects the benefit amount if a person chooses to receive reduced benefits.
<b>government pension offset (OASDI)</b>	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.
<b>gross domestic product (GDP)</b>	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.

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<b>health maintenance organization (Medicare)</b>	Competitive medical plans, including Medicare+Choice, that have contracts with the Centers for Medicare & Medicaid Services on a prospective capitation basis for providing health care to Medicare beneficiaries.
<b>home health agency (Medicare and Medicaid)</b>	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.
<b>home health services (Medicare and Medicaid)</b>	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.
<b>hospice (Medicare and Medicaid)</b>	A public agency or private organization that is primarily engaged in providing pain relief, symptom management, and supportive services to patients that are certified to be terminally ill. Medicare beneficiaries may elect to receive hospice care instead of standard Medicare benefits for terminal illnesses.
<b>household (LIHEAP)</b>	Any individual or group of individuals who are living together as one economic unit and for whom residential energy is customarily purchased in common, or who make designated payments for energy in the form of rent.
<b>husband's benefit (OASDI)</b>	Monthly benefit payable to a husband or a divorced husband (aged 62 or older) of a retired or disabled worker. See <b>spouse's benefit</b> .
<b>independent laboratory services (Medicare)</b>	Diagnostic laboratory tests ordered by a physician and performed in a laboratory independent of a physician's office or a hospital.
<b>inpatient hospital services (Medicare)</b>	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.
<b>institutionalization (Medicaid and SSI)</b>	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.
<b>insured status (OASDI)</b>	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.
<b>interim assistance (SSI)</b>	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.
<b>intermediary (Medicare)</b>	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.
<b>life expectancy</b>	The average number of years of life remaining at each tabulated birthday. See <b>life table (period)</b> .
<b>life table (period)</b>	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

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	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.
<b>lifetime reserve (Medicare)</b>	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.
<b>limitation of widow(er)'s benefit (OASDI)</b>	The reduction of the widow(er)'s benefit due to the early retirement of the deceased spouse. The benefit for a nondisabled widow(er) is limited to the larger of 82-1/2 percent of the deceased spouse's primary insurance amount, or the amount to which the deceased spouse would have been entitled if he or she were still alive. Thus, receipt of benefits by a worker before the full retirement age will result in a reduction of benefits for a widow(er), even if the widow(er) became entitled after his or her own full retirement age. Tables showing data on reduction for early retirement for nondisabled widow(er)s do not include those with limited benefits unless they became entitled before their own full retirement age. See <b>widow(er)'s benefit</b> .
<b>Low-Income Home Energy Assistance Program (LIHEAP)</b>	Federal program to assist low-income households with heating and cooling costs.
<b>low-income households (LIHEAP)</b>	Households with income under the greater of 150 percent of the poverty guideline for their state or 60 percent of the state median income, or households with members receiving Temporary Assistance for Needy Families, Supplemental Security Income, Food Stamps, or certain needs-tested veterans' benefits.
<b>lump-sum death benefit (OASDI)</b>	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.
<b>managed care (Medicare)</b>	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 <b>Medicare+Choice</b> .
<b>mandatory minimum state supplementation (SSI)</b>	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.
<b>maximum family benefit (OASDI)</b>	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.
<b>maximum taxable (OASDI and Medicare)</b>	See <b>annual maximum taxable limit</b> .
<b>mean</b>	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 <b>median</b> .

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<b>median</b>	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 <b>mean</b> .
<b>medicaid</b>	A federal-state program that provides medical assistance for certain individuals and families with low incomes and limited resources.
<b>medical savings account (Medicare)</b>	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 below the annual deductible. MSAs are currently a test program.
<b>medically needy (Medicaid)</b>	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.
<b>Medicare</b>	A federally administered health insurance program that covers the cost of hospitalization, medical care, and some related services for most persons aged 65 or older. Also covers persons receiving Social Security Disability Insurance payments for 2 years, and persons with end stage renal disease. Medicare consists of two separate but coordinated programs—Part A (Hospital Insurance) and Part B (Supplementary Medical Insurance).
<b>Medicare+Choice</b>	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+Choice 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.
<b>Medicare economic index</b>	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.
<b>Medigap (Medicare)</b>	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).
<b>military wage credits (OASDI and Medicare)</b>	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 Sept. 16, 1940, through Dec. 31, 1956. For years after 1956, the basic pay of military personnel is covered under the Social Security program on a contributory basis. In addition to the contributory credits for basic pay, noncontributory wage credits of \$300 were granted for each calendar quarter from January 1957 through December 1977, in which a person received pay for military service. For the period, January 1978 through December 2001, noncontributory wage credits of \$100 were granted for each \$300 of military wages, up to a maximum annual credit of \$1,200.

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<b>minimum benefit (OASDI)</b>	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.
<b>monthly benefit (OASDI)</b>	<p>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:</p> <ol style="list-style-type: none"> <li>1. Subtract the SMI premium from the monthly benefit amount;</li> <li>2. Round the above result down to the nearest whole dollar; and</li> <li>3. Add back the SMI premium to the rounded result from 2 above.</li> </ol> <p>For example, if a monthly benefit amount is \$678.90, and an SMI premium of \$50.00 is deducted, the MBC is \$678.00 (calculated as follows: \$678.90 - \$50.00 = \$628.90 rounded down to \$628.00 + \$50.00 = \$678.00).</p>
<b>mother's benefit (OASDI)</b>	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.
<b>nondisabled widow(er)'s benefit (OASDI)</b>	See <b>widow(er)'s benefit</b> .
<b>nonpayment status (OASDI)</b>	See <b>withholding</b> .
<b>normal retirement age (OASI)</b>	See <b>full retirement age</b> .
<b>old-age benefit (OASI)</b>	See <b>retired-worker benefit</b> .
<b>Old-Age, Survivors, and Disability Insurance (OASDI)</b>	<p>The Social Security programs that pay monthly cash benefits to:</p> <ol style="list-style-type: none"> <li>1. Retired worker (old-age) beneficiaries and their spouses and children and to survivors of deceased insured workers (OASI), and</li> <li>2. Disabled-worker beneficiaries and their spouses and children and for providing rehabilitation services to the disabled (DI).</li> </ol>
<b>optional state supplementation (SSI)</b>	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.
<b>outpatient services (Medicare)</b>	Services furnished to outpatients by a participating hospital for diagnosis or treatment of an illness or injury.
<b>own household (SSI)</b>	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 <b>federal benefit rates</b> .
<b>parent's benefit (OASDI)</b>	Monthly benefit payable to a dependent parent aged 62 or older of a deceased fully insured worker.

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<b>payment status (OASDI)</b>	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.
<b>peer review organization (Medicare)</b>	A group of practicing physicians and other health care professionals, paid by the federal government, to review the care given to Medicare patients.
<b>physician services (Medicare)</b>	Services provided by an individual licensed under state law to practice medicine or osteopathy. Services provided by hospitals are not covered by this provision.
<b>preferred provider organization (Medicare)</b>	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.
<b>presumptive disability or blindness (SSI)</b>	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.
<b>primary insurance amount (OASDI)</b>	The primary insurance amount (PIA), 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.
<b>primary insurance amount formula (OASDI)</b>	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.
<b>prospective payments system (Medicare)</b>	A method of reimbursement for hospitals that was implemented effective with hospital cost reporting periods beginning on or after Oct. 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.
<b>Prouty benefit (OASI)</b>	See <b>special age-72 benefit</b> .
<b>Provider (Medicare and Medicaid)</b>	<i>Medicare</i> —A provider is a facility, supplier, or physician who furnishes medical services. <i>Medicaid</i> —A provider is a person, group, or agency who provides covered services to enrollees.
<b>Qualified Medicare Beneficiaries (Medicare and Medicaid)</b>	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.

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<b>quarters of coverage (OASDI and Medicare)</b>	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.
<b>Railroad Retirement</b>	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.
<b>reasonable cost (Medicare)</b>	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.
<b>redetermination (SSI)</b>	The periodic review of eligibility for each Supplemental Security Income recipient to ensure that eligibility continues and that payments are in the proper amount.
<b>reduction for early retirement (OASDI)</b>	See <b>actuarial reduction</b> .
<b>representative payee (OASDI and SSI)</b>	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.
<b>retired-worker (old-age) benefit (OASI)</b>	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.
<b>retirement age (OASI)</b>	The age at which an individual establishes entitlement to retirement benefits. See <b>full retirement age</b> .
<b>retirement earnings test (OASDI)</b>	See <b>earnings test</b> .
<b>Secondary benefit (OASDI)</b>	Monthly benefit payable to a spouse or child of a retired or disabled worker, or to a survivor of a deceased worker.
<b>Section 1619(a) (SSI)</b>	See <b>special cash payments</b> .
<b>Section 1619(b) (SSI)</b>	See <b>special recipient status</b> .
<b>self-employed (OASDI and HI)</b>	One who derives income from the operation of a partnership or nonincorporated trade or business.
<b>skilled nursing facility (Medicare)</b>	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.

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<b>Social Security number (OASDI and HI)</b>	A nine-digit number used to identify the record of earnings an individual has in employment or self-employment covered by Social Security.
<b>Social Security Act</b>	Public Law 74-271, enacted August 14, 1935, with subsequent amendments. The Social Security Act consists of 20 titles, of which four have been repealed.
<b>special age-72 benefit (OASI)</b>	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.)
<b>special cash payments (SSI)</b>	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.
<b>special minimum PIA (OASDI)</b>	An alternative primary insurance amount (PIA) based on the worker's length (years) of covered employment. It is designed to help those who worked in covered employment for many years but had low earnings. See Table 2.A12 for computation of the special minimum PIA.
<b>special recipient status (SSI)</b>	For Medicaid purposes, provides special status to working disabled or blind individuals when their earnings make them ineligible for cash payments.
<b>Specified Low-Income Medicare Beneficiaries (Medicare and Medicaid)</b>	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.
<b>spell of illness (Medicare)</b>	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.
<b>spouse's benefit (OASDI)</b>	Monthly benefit payable to a spouse or a divorced spouse of a retired or disabled worker under one of the following conditions: <ol style="list-style-type: none"> <li>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</li> <li>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</li> <li>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.</li> </ol>



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<b>state-administered supplementation (SSI)</b>	See <b>state supplementation</b> .
<b>state supplementation (SSI)</b>	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.
<b>student benefit (OASDI)</b>	Child's benefit payable to a full-time unmarried elementary or secondary school student aged 18–19. Student benefits end at age 19 or at the end of the current semester or quarter, whichever is later.
<b>substantial gainful activity (DI and SSI)</b>	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.
<b>Supplemental Security Income (SSI)</b>	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.
<b>surviving divorced father's benefit (OASI)</b>	See <b>father's benefit</b> .
<b>surviving divorced mother's benefit (OASI)</b>	See <b>mother's benefit</b> .
<b>surviving divorced spouse's benefit (OASI)</b>	See <b>widow(er)'s benefit</b> .
<b>survivors benefit (OASI)</b>	Benefit payable to a survivor of a deceased insured worker.
<b>suspended benefit (OASDI)</b>	A benefit not in current-payment status.
<b>taxable earnings (OASDI and HI)</b>	Wages and/or self-employment income that is under the applicable annual maximum taxable limit.
<b>taxable maximum (OASDI and HI)</b>	See <b>annual maximum taxable limit</b> .
<b>taxable self-employment income (OASDI and HI)</b>	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.
<b>taxable wages (OASDI and HI)</b>	See <b>taxable earnings</b> .
<b>taxes (OASDI and HI)</b>	See <b>contributions</b> .
<b>technical entitlement</b>	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.
<b>Temporary Assistance for Needy Families (TANF)</b>	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

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	Children (AFDC), Emergency Assistance, and Job Opportunities and Basic Skills Training (JOBS) programs.
<b>Temporary Disability Insurance (TDI)</b>	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.
<b>termination (OASDI)</b>	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).
<b>totalization (OASDI)</b>	International agreements that coordinate the U.S. Social Security programs with the Social Security programs of other countries are called "totalization agreements."
<b>Thrifty Food Plan (Food Stamp Program)</b>	A low-cost model diet plan based on the National Academy of Sciences' Recommended Dietary Allowances. Households are issued a monthly allotment of food stamps based on the Thrifty Food Plan.
<b>Trust fund (OASDI and Medicare)</b>	<p>Four separate accounts in the U.S. Treasury in which are deposited the equivalent of taxes received under the Federal Insurance Contributions Act, the Self-Employment Contributions Act, contributions dealing with coverage of state and local government employees, any sums received under the financial interchange with the railroad retirement account, voluntary hospital and medical insurance premiums, and transfers of federal general revenues. Funds not withdrawn for current monthly or service benefits, the financial interchange, and administrative expenses are invested in interest-bearing federal securities, as required by law. The interest earned is also deposited in the trust funds.</p> <ol style="list-style-type: none"> <li>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.</li> <li>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.</li> <li>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.</li> <li>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.</li> </ol>
<b>Unemployment Insurance</b>	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.
<b>Veterans' benefits</b>	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.

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<b>widowed father's benefit (OASI)</b>	See <b>father's benefit</b> .
<b>widowed mother's benefit (OASI)</b>	See <b>mother's benefit</b> .
<b>widow(er)'s benefit (OASDI)</b>	<p>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.</p> <p>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.</p> <p>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.</p>
<b>wife's benefit (OASDI)</b>	<p>A monthly benefit payable to a wife or divorced wife of a retired or disabled worker. See <b>spouse's benefit</b>.</p>
<b>Windfall Elimination Provision-WEP (OASI and DI)</b>	<p>A modified benefit formula for determining the primary insurance amount, which eliminates the windfall in benefits for individuals who have only minimal Social Security coverage and will receive a pension based on years of work in noncovered employment. This formula prevents a windfall to persons who unfairly benefit from provisions aimed at low-income workers. The change was phased in for workers eligible for retirement or Disability Insurance benefits and for a pension from noncovered employment beginning in 1986; became fully effective in 1990. See Table 2.A11.1</p>
<b>withholding (OASDI)</b>	<p>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.</p>
<b>worker (OASDI)</b>	<p>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.</p>
<b>workers' compensation and public disability benefit offset (DI)</b>	<p>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.</p>



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## Index to Tables

### A

Accuracy rates (OASDI and SSI), 2F7

Actuarial reduction (OASDI) (see Reduction for early retirement (OASDI))

Administrative data (SSA), 2F1-2F11

Administrative expenses  
Disability Insurance Trust Fund, 4A2, 4A3  
Hospital Insurance Trust Fund, 8A1  
Old-Age and Survivors Insurance Trust Fund, 4A1, 4A3  
Supplementary Medical Insurance Trust Fund, 8A2

Administrative Law Judges (SSA), workloads of, 2F8

Adult beneficiaries (OASDI), 5A16, 5L1

Age (OASDI), 3C5, 3C6 (see also specific types of OASDI benefits including: Children; Disabled widows and widowers; Disabled workers; Retired workers; Widowed mothers and fathers; Widows and widowers, nondisabled; Wives and husbands)  
awards, 6A3-6A5, 6B1, 6B5, 6C2, 6C3, 6D3, 6D5, 6D7  
benefit types and amounts, 5A16  
centenarians, 5J5  
Hispanic origin, 3C8  
income, 3E3, 3E6  
life table, 4C6  
race, 3C7, 5A1.1-5A1.8, 5A3  
sex, 3C8, 5A1.1-5A1.8, 5A3, 5A10, 5A16  
state data, 5J3, 5J5  
summary data, 5A1.1-5A1.8, 5A5, 5A10, 5A15, 5A16

Age (SSI) (see Supplemental Security Income)

Aged (SSI) (see Supplemental Security Income)

Agricultural employees (OASDI), 2A1

Aid to Families with Dependent Children (AFDC), 9G1, 9G2 (see TANF)

Aliens (SSI) (see Noncitizens (SSI))

Allowances (OASDI and SSI), 2F7

Appeals Council cases reviews (SSA), 2F11

Applications (OASDI), 6C7

Automatic adjustment provisions (OASDI), 2A18

Average annual wage (OASDI), 2A8

Average indexed monthly earnings (OASDI), 2A10, 2A11, 2A18  
Average monthly wage (OASDI), 2A10, 2A16, 2A17, 2A20

Awards (OASDI)  
age, 6A3-6A5, 6B1, 6B5, 6C2, 6C3, 6D3, 6D5, 6D7  
applications, 6C7  
children, 6A1, 6A3, 6D4, 6D5  
conversion, 6A4  
diagnostic group, 6C3  
disabled workers, 6A1-6A6, 6C1-6C3, 6C7  
initial, 6B1  
lump-sum, 4A5, 6D9  
primary insurance amount, 6A2  
race, 6A3  
retired workers, 6A1-6A6, 6B1, 6B3-6B5  
sex, 6A2, 6A3  
state data, 6A6  
summary data, 6A1-6A5  
widowed mothers and fathers, 6A1, 6A3, 6D6, 6D7  
widows and widowers, 6A1-6A3, 6A5, 6D7, 6D8  
wives, 6A3  
wives and husbands, 6A1, 6A5, 6D1, 6D3

Awards (SSI)  
adults, 7A8, 7B9, 7E2  
age, 7A8, 7B9, 7E2  
aged, 7A8, 7B9, 7E2  
blind, 7A8, 7B9, 7E2  
blind and disabled children, 7E2  
disabled, 7A8, 7B9, 7E2  
sex, 7E2  
state data, 7B9

### B

Bend points in benefit formula (OASDI), 2A11, 2A13, 2A18

Beneficiaries and payments, currently payable (OASDI)  
age, 5A1.1-5A1.8, 5A3, 5A6, 5A10, 5A15, 5A16  
assets, 3E3  
concurrent, OASDI and SSI, 3C5, 3C6, 3C6.1  
earnings, 3E3  
foreign countries, 5J11  
Hispanic origin, 3C8  
income, 3E3, 3E6, 3E8  
sources, 3E3  
international agreements, eligibility based on, 5M1  
living arrangements, 3E3, 3E6  
race, 3C7, 5A1.1-5A1.8, 5A3, 5A6, 5A7  
representative payment, 5L1  
sex, 3C8, 5A1.1-5A1.8, 5A3, 5A7, 5A10, 5A14-5A16  
state data, 5J1-5J6, 5J8-5J10, 5J12-5J14  
summary data, 3C6.1, 3C7, 3C8, 5A1.1-5A1.8, 5A3-5A8, 5A10  
type of benefit (see Children (OASDI); Disabled widows and widowers; Disabled workers; Parents; Retired workers; Special age-72 beneficiaries; Widowed mothers and fathers; Widows and widowers, nondisabled; Wives and husbands)

Benefit computations, (OASDI), 2A8-2A14, 2A16-2A18

Benefit rates (SSI), 2B1

Benefit types and levels (OASDI), qualifications and legal criteria for  
beneficiary families, 2A26  
children, 2A21, 2A22  
disabled workers, 2A20  
divorced beneficiaries, 2A21, 2A22  
illustrative monthly benefits, 2A26  
lump sum awards, 2A25  
maximum and minimum, 2A27, 2A28  
parents, 2A22  
PIA, percent of, 2A20-2A22  
retired workers, 2A20, 2A27, 2A28  
special age-72 beneficiaries, 2A24  
survivors, 2A22, 2A23, 2A26  
transitionally insured, 2A23  
vocational rehabilitation services, 2A25  
widowed mothers and fathers (OASDI), 2A22  
widows and widowers, 2A22-2A24  
wives and husbands, 2A21-2A24

Black Lung  
benefits, 9D1, 9D2  
civil litigation, 2F10  
hearing receipts, dispositions, claims pending, 2F9

Blind (SSI) (see Supplemental Security Income)

## C

Centenarians (OASDI), 5J5

Children (AFDC) (see Aid to Families with Dependent Children)

Children (OASDI)  
age, 5A1.4, 5A5, 5A10, 6D5  
awards, 6A1, 6A3, 6D4, 6D5  
beneficiary families, 5H1-5H4  
benefit distributions, 5H3, 5H4  
benefits paid  
annual, 4A5, 4A6  
monthly, 5A4, 5A16, 5A17, 5F4, 5J4, 5J14  
benefits withheld, 6E4, 6E5  
disabled aged 18 or older, 3C6.1, 5A1.4, 5A10, 5A16, 5A17, 5C2, 5D4.1, 5E2, 5F4, 5F6, 5J14, 6D4  
foreign countries, 5J11  
of deceased workers, 5A1, 5A1.4, 5F4, 5F6, 5F7, 6D4  
of disabled workers, 5A1, 5A1.4, 5E1, 5E2, 5F4, 6D4  
of retired workers, 5A1, 5A1.4, 5C1, 5C2, 5F4, 6D4  
primary insurance amount, 5C1, 5E1, 5F7, 5H2  
special minimum, 5A8  
qualifications for benefits, 2A21, 2A22  
race, 5A1, 5A1.4, 5A6, 6A3  
sex, 5A16  
state data, 5J2, 5J4, 5J10, 5J14  
students, aged 18-19, 5A1.4, 5C2, 5E2, 5F4, 5F6, 6D4  
terminations, 6F1-6F3  
under age 18, 5A1.4, 5C2, 5E2, 5F4, 5F6, 6D4

Children, blind or disabled (SSI) (see Supplemental Security Income)

Civil litigation (OASDI and SSI), 2F10

Civil Service (see Government workers)

Claims workloads (OASDI and SSI), 2F4-2F6

Clergy (see Religious personnel)

Clinical Laboratory Improvement Act (CLIA) facilities (see Medicare)

Computations, benefit (OASDI), 2A10-2A14, 2A16-2A18

Concurrent beneficiaries (OASDI and SSI), 2F9, 2F10, 3C5, 3C6, 3C6.1, 7D1, 7D2

Constant dollars (AFDC, OASDI, and SSI benefits), 3C4

Consumer Price Index (CPI), 2A18, 3C4, 3E1

Continuation of Medicaid coverage (1619b) (SSI), 7F3-7F5

Contribution rates (OASDI), 2A3, 2A5

Contributions (OASDI), 2A4, 4B10-4B12

Cost-of-living adjustments (OASDI and SSI), 2A11, 2A13, 2A14, 2A18, 2A19, 2B1

Covered workers (OASDI)

age, 4B5, 4B6, 4B8

categories of, 2A1

coverage election or waiver, 2A1

legislation affecting, 2A1

median earnings, 4B3, 4B6

new entrants, 4B1

OASDHI contributions, 4B10-4B12

self-employed, 2A1, 4B2-4B4, 4B8-4B12

sex, 4B3-4B9

Social Security numbers issued, 4B1

state data, 4B10, 4B12

taxable earnings, amount reported, 4B1-4B3, 4B5, 4B10-4B12

wage and salary, 4B2, 4B3, 4B7, 4B10-4B12

with earnings above maximum taxable, 4B7, 4B9

with earnings below maximum taxable, 4B4, 4B7, 4B9

Creditable earnings (OASDI) (see Taxable earnings (OASDI))

## D

Death probability, 4C6

Delayed retirement credit (OASDI), 2A20, 2A22, 5B1-5B3

Denials (see Service delivery (OASDI and SSI))

Dependents and survivors (OASDI), 5F1-5F13

Diagnoses (OASDI), 5D4.1, 5D5, 5D6, 5J12, 5J13, 6C3

Diagnoses (SSI), 7F1, 7F2

Direct deposit (OASDI), 5K1

Disability, definition of (OASDI), 2A7

Disability determinations (see Service delivery (OASDI and SSI))

Disability Insurance (OASDI), 2F5, 2F9, 2F10

Disability Insurance Trust Fund (OASDI) (see Trust Funds)

Disabled adult children (see Children (OASDI), disabled, aged 18 or older)

Disabled beneficiaries (OASDI), 5A16, 5A17, 5J14 (see also Children (OASDI); Disabled widows and widowers; Disabled workers)

Disabled children (OASDI) (see Children (OASDI), disabled, aged 18 or older)

Disabled (SSI) (see Supplemental Security Income)

Disabled widows and widowers (OASDI)  
 age, 5A1.7, 5A5, 5A16, 6A3, 6D7  
 awards, 6A3, 6D7, 6D8  
 beneficiary families, 5H2, 5H4  
 benefit distributions, 5H4  
 benefits paid, monthly, 3C6.1, 5A16, 5A17, 5F8, 5J14  
 diagnostic group, 5D4.1  
 primary insurance amount, 5F7, 5H2  
   special minimum, 5A8  
 race, 5A1, 5A1.7, 5A7, 6A3  
 sex, 5A1.7, 5A7, 5A16, 5F6, 6A3, 6D8  
 state data, 5J14  
 surviving divorced, 5A1.7  
 year of entitlement, 5F10

Disabled workers (OASDI)  
 age, 5A1.2, 5A3, 5A5, 5A10, 5A16, 5D4, 5D6, 6A3, 6A4, 6C2, 6C3  
 applications, 6C7  
 awards, 6A1-6A5, 6C1-6C3, 6C7  
 beneficiary families, 5H1-5H3  
 benefit distributions, 5D2, 5H3, 5J8, 6C1  
 benefits paid  
   annual, 4A6  
   monthly, 3C6.1, 5A4, 5A16, 5A17, 5D3, 5J4, 5J14, 6A6  
 benefits withheld, 6E4, 6E5  
 diagnostic group, 5D4.1, 5D5, 5D6, 5J12, 5J13, 6C3  
 foreign countries, 5J11  
 primary insurance amount, 5E1, 5H2, 6A2  
   special minimum, 5A8  
 qualifications for benefits, 2A20  
 race, 5A1, 5A1.2, 5A3, 5A6, 5A7, 6A3  
 sex, 5A1.2, 5A3, 5A7, 5A10, 5A16, 5D3, 5D5, 5E2, 6A2-6A4, 6C3  
 state data, 5J2, 5J4, 5J8, 5J12-5J14, 6A6  
 terminations, 6F1, 6F2  
 with reduction for early retirement, 5A3, 6A5  
 year of entitlement, 5D1

Divorced beneficiaries (OASDI), 2A21, 2A22, 5A1.3, 5A1.5-5A1.7, 5F12, 6D3, 6D6, 6D7

Domestic employees (OASDI), 2A1

Dual entitlement (OASDI), 5A14, 5A15, 5G1-5G5

**E**

Early retirement (OASDI) (see Reduction for early retirement (OASDI))

Earnings of covered workers (OASDI) (see also Taxable earnings (OASDI))  
 amount of, 4B1-4B3, 4B7, 4B9, 4B10, 4B12  
 below annual maximum taxable amount, 4B4, 4B7, 4B9  
 median, by age and sex of worker, 4B3, 4B6  
 self-employed workers, 4B2-4B4, 4B9-4B12  
 state data, 4B10, 4B12  
 wage and salary workers, 4B2, 4B3, 4B7, 4B10-4B12

Earnings test (OASDI)  
 amount permitted without reduction in benefits, 2A29  
 automatic adjustment of, 2A18  
 beneficiaries affected, 6B1, 6E4, 6E5

Education  
 private, social welfare expenditures, 3A4  
 public, social welfare expenditures, 3A1, 3A3

Emergency assistance, 9G1, 9G2

Employees (SSA) (see Offices and staff (SSA))

End stage renal disease (Medicare), 8B5, 8C3

Energy Assistance (see Low-Income Home Energy Assistance Program)

Entitlement year (OASDI), 5B4, 5D1, 5F9, 5F10

Excess payments (see Service delivery (OASDI and SSI))

Expectation of life, 4C6

**F**

Fair Labor Standards Act, 3B3

Families, beneficiary (OASDI), 2A26, 3E6, 5H1-5H4

Family maximum benefit (OASDI), 2A13, 2A14, 2A17, 2A26

Fathers (see Widowed mothers and fathers (OASDI))

Federal employees (see Government workers)

FICA taxes (see Contribution rates (OASDI))

Financing (OASDI), 2A3-2A6

Food Stamps, 3A3, 9H1

---

Foreign countries (OASDI), 5J1-5J11, 5K1, 5M1

## G

General revenue appropriations (OASDI), 2A6

Government pension offset (OASDI), 2A22, 2A23, 6E4, 6E5

Government workers, 2A1, 3C3

Gross domestic product (GDP), 3A1, 3A3, 3A4

## H

Health and medical programs, expenditures for, 3A1, 3A3, 3A4  
(see also Medicaid; Medicare)

Health insurance for the aged and disabled (see Medicare)

Hearing receipts, dispositions, claims pending (OASDI and SSI),  
2F9

Hearings and appeals (OASDI), 2F1, 2F8-2F11

Hispanic origin, 3C8

Historical data

administrative data, 2F3,2F7

Aid to Families with Dependent Children (AFDC), 9G1

Black Lung benefits, 9D1

Emergency assistance, 9G1

employment and earnings, 3B3

Food Stamps, 9H1

interprogram data, 3C3-3C5, 3C6.1

LIHEAP, 9J1.1, 9J2.1, 9J3.1

Medicaid recipients, 8E1, 8E2

Medicare

cost sharing and premium amounts, 2C1

enrollment, utilization and reimbursement, 8B1-8B5, 8B8-  
8B12

participating facilities, 8C1

trust funds, 8A1, 8A2

poverty data, 3E1, 3E2, 3E8

Social Security Acts, 2A1, 2A2, 2A6, 2A7, 2A10-2A14, 2A16-  
2A18, 2A20- 2A25, 2A29, 2A31, 2B1

Social Security program (OASDI)

awards, 6A1, 6A2, 6B5, 6C2, 6C7, 6D1, 6D4, 6D6, 6D8, 6D9

benefit increases, cumulative effects of, 2A19

coverage, financing, and insured status, 2A3, 2A4

covered workers, 4B1-4B9, 4B11

current-pay benefits

benefit families, 5H1

dependents and survivors, 5F1, 5F4, 5F6, 5F8, 5F12

disabled workers, 5D3, 5D4, 5E2

dual entitlement, 5G2

international agreements, 5M1

retired workers, 5B5, 5B8, 5C2

summary data, 5A4, 5A14, 5A17

earnings guidelines and SGA, 2A30

indexed earnings, 2A8, 2A9

insured workers, 4C1, 4C2, 4C5

retired worker benefits, minimum and maximum, 2A2, 2A28

terminations, 6F1

Trust Funds, 4A1-4A6

Supplemental Security Income (SSI)

1619a and 1619b, 7F3

noncitizens receiving, 7E6

summary data, 7A3-7A5, 7A9

Veterans benefits, 9F1

Workers' compensation, 9B1

Home health agencies (Medicare), participating facilities, 8C1,  
8C3

Home health services

Medicaid, 8E1

Medicare, 8B1, 8B2, 8B9

Hospital Insurance (HI) (see Medicare)

Hospital Insurance Trust Fund (Medicare) (see Trust Funds)

Hospitals, expenditures for care

Medicaid, 8E1

Medicare, 8B1, 8B2, 8B8

Hospitals (Medicare), type of participating facility, 8C1, 8C2

Housing, social welfare expenditures for, 3A1, 3A3

Husbands (OASDI) (see Wives and husbands (OASDI))

## I

Illustrative monthly benefits (OASDI), 2A26

Income

age, 3E3, 3E6

family, 3E3, 3E6, 3E8

personal, 4A4

poverty guidelines, 3E8

poverty thresholds, 3E1

race, 3E6

shares, 3E3, 3E6

sources, 3E3

Income tax treatment of OASDI benefits (OASDI), 2A31, 2A32,  
3C3, 4A1-4A3

Independent laboratories (Medicare), participating, 8B9, 8C1, 8C3

Indexing factors and indexed earnings (OASDI), 2A8, 2A9

Insured status provisions (OASDI), 2A7

Insured workers (OASDI)

age, 4C2, 4C5

fully insured, 4C1, 4C2, 4C5

insured for disability, 4C1, 4C2

monthly benefits for survivors of, 2A22

percent of population, 4C5

permanently insured, 4C1

sex, 4C2, 4C5



Interfund borrowing, 2A6	hospital insurance, 2C1, 8A1, 8B1-8B5, 8B8,8B8.1, 8C1-8C3
Intermediate-care facilities for the mentally retarded (Medicaid), 8E1	hospitals (type of participating facility), 8B2, 8B8, 8B8.1, 8C1-8C3
International agreements (OASDI), 5M1	independent laboratories, 8B9, 8C1, 8C3
	outpatient services, 8B1, 8B2, 8B9
	participating facilities, 8C1-8C3
	persons served, 8B1, 8B2
	physicians' services, 8B1, 8B2, 8B9-8B11
	premiums, 2C1, 8A1, 8A2
	race, 8B4, 8B5
	reasonable charges, 8B11
	reimbursements, 8B1-8B11
	sex, 8B4, 8B5
	short-stay hospitals, 8B8, 8B8.1
	skilled nursing facilities and services, 8B8, 8C1, 8C3
	state data, 4B12, 8B3, 8B8, 8B8.1, 8B12, 8C2, 8C3
	Supplementary Medical Insurance, 2C1, 8A2, 8B1, 8B2, 8B4, 8B5, 8B9-8B12, 8C1, 8C3
	trust funds, 8A1, 8A2
	utilization, 8B1-8B5, 8B8-8B11
	workers, 4B12
	Military personnel (see Uniformed services)
	Minimum benefit (OASDI), 2A11, 2A17, 2A27, 2A28
	Minimum wage, 2A26, 3B3
	Minor children (OASDI) (see Children (OASDI), under age 18)
	Mortality table (see Life table)
	Mothers (OASDI) (see Widowed mothers and fathers (OASDI))
	<b>N</b>
	Noncitizens (SSI), 7E6
	Nondisabled widows and widowers (OASDI) (see Widows and widowers, nondisabled (OASDI))
	Nonprofit organizations, 2A1
	Nursing facilities (Medicaid), expenditures for care, 8E1
	<b>O</b>
	Offices (SSA) and employees (SSA), 2F1-2F3
	data operations centers, 2F1
	field services locations, 2F1
	hearings and appeals, 2F1
	program service centers, 2F1
	regional offices, 2F1
	staff, 2F2, 2F3
	demographic characteristics of, 2F2
	employees with disabilities, 2F2
	grade levels of, 2F2
	size of, 2F3
	work years, total, 2F3
	Old-Age and Survivors Insurance Trust Fund (OASDI) (see Trust Funds)

---

Old-Age Assistance, 3C4

Old-Age, Survivors, and Disability Insurance (OASDI)  
(see entries identified by (OASDI))

Outpatient services (Medicare and Medicaid), 8B1, 8B2, 8B9, 8E1

## P

Parents (OASDI), 2A22, 4A5, 5A1, 5A1.8, 5A4-5A7, 5A10, 5F6,  
5F7, 5G3, 5H2, 6A1, 6E4

Pension offset, noncovered government, 2A22, 2A23, 6E4, 6E5

Pensions

private, 3A4

public employee, 3A3, 3C3

Period of disability, 2A7

Physicians' services (Medicaid), 8E1

Physicians' services (Medicare), 8B1, 8B2, 8B9-8B11

Population in Social Security area, 4C5

Poverty data

age, 3E2

aged families, 3E3, 3E6

aged 65 or older, 3E1, 3E4

CPI, annual average, 3E1

family size, 3E8

family status, 3E2

living arrangements, 3E4, 3E6

nonaged family units, 3E3

poverty guidelines, 3E8

poverty thresholds, 3E1

race, 3E6

sex, 3E2, 3E4

shares of money income, sources of, 3E3

Social Security share of money income, 3E6

Primary insurance amount (OASDI) (see also specific types of  
OASDI benefits including: Children; Disabled widows and  
widowers; Disabled workers; Parents; Retired workers; Wid-  
owed mothers and fathers; Widows and widowers, nondis-  
abled; Wives and husbands)

average indexed monthly earnings, 2A10, 2A11

average monthly wage, 2A10, 2A16, 2A17

benefit increases, effects of, 2A11, 2A13-2A14, 2A16-2A19

formulas for computing, 2A11, 2A12, 2A16-2A19

illustrative amounts, 2A26

indexing factors and indexed earnings, 2A8, 2A9

maximum indexed earnings, 2A9

minimum and maximum benefit, 2A11, 2A13, 2A14, 2A17,  
2A26-2A28

percent of for benefit types, 2A20-2A22

relationship to earnings levels, 2A26

special minimum, 2A12, 5A8

Windfall Elimination Provision (WEP), computation based on,  
2A11.1

Private social welfare expenditures, 3A4

Prouty beneficiaries (OASDI) (see Special age-72 beneficiaries  
(OASDI))

Provisions, history of

Medicaid, 2C2

Medicare, 2C1

OASDI, 2A1-2A14, 2A16-2A32

SSI, 2B1

Public assistance (see Aid to Families with Dependent Children;  
Public social welfare expenditures)

Public social welfare expenditures, 3A1, 3A3, 3C3

## Q

Quarters of coverage (OASDI), 2A7, 2A18

## R

Race (OASDI) (see also specific types of OASDI benefits includ-  
ing: Children; Disabled widows and widowers; Disabled work-  
ers; Retired workers; Widowed mothers and fathers; Widows  
and widowers, nondisabled; Wives and husbands)

age, 5A1.1-5A1.8, 5A3, 6A3

Medicare, 8B4, 8B5

poverty status of aged families, 3E6

sex, 5A1.1-5A1.8, 5A3, 5A7, 6A3

state data, 5J5.1

summary data, 3C7, 5A1, 5A6, 5A7, 6A3

Race (SSI), 3C7

Railroad Retirement program

social welfare expenditures for, 3A3

source of funds for, 3C3

trust fund transfers to and from, 4A1-4A3, 8A1

Railroad temporary disability insurance program, 3A3, 9C1

Railroad unemployment insurance program, 3A3

Reconsiderations (OASDI and SSI), 2F7

Reduction for early retirement (OASDI)

age, 5A3, 5B1, 5B2, 6A5

benefit amounts, illustrative, 2A26

disabled workers, 5A3, 6A5

minimum and maximum benefit, 2A27

race, 5A3, 5A7

retired workers

dually entitled, 5G1

with benefits withheld, 6B1, 6E1

with delayed retirement credit, 5B1, 5B3

with reduction, 5A3, 5B6-5B8, 5G1, 5H2, 6A5, 6B3, 6B4, 6E1

without delayed retirement credit, 5B2, 5B3

without reduction, 5B1, 5B2, 5B6-5B8, 5G1, 5H2, 6B3, 6B4,  
6E1

sex, 5A3, 5A7, 5B1, 5B2, 5B6-5B8, 5G1, 6A5, 6B3, 6B4

widows, nondisabled, 5A3, 6A5

wives and husbands, 5A3, 5A7, 6A5

Religious personnel, 2A1

Representative payment (OASDI), 5L1

Representative payment (SSI), 7E4

Retired workers (OASDI)

- age, 5A1.1, 5A3, 5A5, 5A10, 5A15, 5A16, 5B5, 5B9, 6A4, 6A5, 6B5
- awards, 6A1-6A5, 6B1, 6B3-6B5
- beneficiary families, 5H1-5H3
- benefit distributions, 5B6, 5B7, 5B9, 5J6, 6B3, 6B4, 5H3
- benefits in current and constant dollars, 3C4
- benefits paid
  - annual, 4A5
  - monthly, 5A4, 5A16, 5J4, 6A6
- benefits withheld, 6E1, 6E4
- benefits withheld due to earnings, 6B1
- computation of benefits, worksheet for (see the subsection Computing a Retired-Worker Benefit in the Social Security: History of Provisions section.)
- disability conversions, 6A4
- foreign countries, 5J11
- newly entitled, 6A4
- primary insurance amount, 5B1, 5B2, 5B7, 5C1, 5G1, 5H1, 6A2, 6B1, 6B4
- special minimum, 5A8
- qualifications for benefits, 2A20
- race, 5A1, 5A1.1, 5A3, 5A6, 5A7, 6A3
- sex, 5A1, 5A1.1, 5A3, 5A7, 5A10, 5A15, 5A16, 5B6-5B9, 5C2, 6A2-6A5, 6B1, 6B3-6B5, 6E4
- state data, 5J2, 5J4, 5J6, 6A6
- terminations, 6F1, 6F2
- with delayed retirement credit, 5B1-5B3
- with dual entitlement, 5G1-5G5
- with reduction for early retirement, 5A3, 5B6-5B8, 5G1, 5H2, 6B1, 6B3, 6B4, 6E1
- without reduction for early retirement, 5B1, 5B2, 5B6-5B8, 5G1, 5H2, 6B1, 6B3, 6B4, 6E1
- year of entitlement, 5B4

Retirement programs (see Pensions; Railroad Retirement program; Retired workers (OASDI))

Retirement test (see Earnings test (OASDI))

## S

SECA taxes (see Contribution rates (OASDI))

Section 1619a (see Special SSI cash payments (1619a) (SSI))

Section 1619b (see Continuation of Medicaid coverage (1619b) (SSI))

Self-employed workers (see also Covered workers (OASDI))

- Earnings of covered workers (OASDI)
  - age, 4B8
  - contribution rates, 2A3
  - earnings, 4B2-4B4, 4B9-4B12
  - maximum annual amount of contributions, 2A4
  - maximum taxable earnings, 2A3

Medicare, 4B12

OASDHI contributions, 2A4, 2A5, 4B10, 4B11

sex, 4B3, 4B4, 4B9

state data, 4B10, 4B12

tax credits, 2A5, 2A6

taxable earnings, amount reported, 4B2, 4B10-4B12

with earnings above maximum taxable, 4B9

with earnings below maximum taxable, 4B4, 4B9

Service delivery (OASDI and SSI)

- accuracy rates, payment, 2F7
- allowances, 2F7
- denials, 2F7
- disability determinations, 2F7
- 800 number (1-800-772-1213)
  - average waiting time, 2F7
  - calls received, 2F7
- excess payments, 2F7
- OASI payments, 2F7
- reconsiderations, 2F7
- reversals of denials, 2F7
- SSI payments, 2F7
- underpayments, 2F7

Sex (OASDI) (see also specific types of OASDI benefits including: Children; Disabled widows and widowers; Disabled workers; Retired workers; Widowed mothers and fathers; Widows and widowers, nondisabled; Wives and husbands)

- age, 3C8, 5A1.1-5A1.8, 5A10, 5A15, 5A16, 6A3
- life table, 4C6
- race, 3C7, 5A1.1-5A1.8, 5A7, 6A3
- state data, 5J5.1
- summary data, 5A7, 5A16, 6A3

Sex (SSI) (see Supplemental Security Income)

Short-term sickness and disability benefits, 3A4, 9C1

Skilled nursing facilities (Medicare)

- expenditures for care, 8B1, 8B2, 8B8
- participating facilities, 8C1, 8C3

Social insurance programs, summary data, 3C3

Social Security Act, 2A1, 2A2, 2A6, 2A7, 2A10-2A14, 2A16-2A18, 2A20-2A25, 2A29, 2A31, 2B1

Social Security program (see entries identified by (OASDI))

Social welfare expenditures, 3A1, 3A3, 3A4, 3C3

Special age-72 beneficiaries (OASDI), 2A24, 4A5, 5A4, 6A1, 6E4, 6F1, 6F2

Special minimum primary insurance amount (OASDI), 2A12, 5A8

Special SSI cash payments (1619a) (SSI), 7F3-7F5

Spouses (OASDI) (see Wives and husbands (OASDI))

Staff (SSA) (see Offices (SSA) and employees (SSA))

State and local government pensions (see Government workers)

State data

Aid to Families with Dependent Children, 9G1, 9G2  
Black Lung benefits, 9D2  
Low-Income Home Energy Assistance, 9J1, 9J2, 9J3  
Medicaid, 2C2, 8H1  
Medicare, 4B12, 8B3, 8B8, 8B8.1, 8B12, 8C2, 8C3  
OASDI  
beneficiaries, 3C5, 5J1-5J6, 5J8-5J10, 5J14, 6A6  
concurrent receipt with SSI, 3C5, 7D2  
covered workers, 4B10, 4B12  
diagnoses, 5J12, 5J13  
monthly benefits of disabled beneficiaries, 5J14  
taxable earnings, 4B10, 4B12  
SSI  
concurrent receipt with OASDI, 3C5, 7D2  
Medicaid, 2C2  
recipients, 3C5, 7B1-7B3, 7B7-7B9, 7D2, 7F5  
Temporary Assistance for Needy Families (TANF), 9G2  
Unemployment Insurance, 9A2  
Workers' compensation, 9B1-9B3

State Supplementation (see Supplemental Security Income (SSI))

Students (OASDI) (see Children (OASDI))

Substantial gainful activity, 2A30

Supplemental Security Income (SSI)

adults, 7C1, 7E2, 7E3  
age, 3C7, 3C8, 7A1, 7A8, 7A9, 7B9, 7D1, 7D2, 7E2-7E5, 7F1, 7F2, 7F4  
aged, 3C5, 7A1-7A5, 7A8, 7A9, 7B1, 7B2, 7B9, 7C1, 7C2, 7D1, 7D2, 7E2-7E5  
awards, 7A8, 7B9, 7E2  
benefit rates, 2B1  
benefits in current and constant dollars, 3C4  
blind, 7A1-7A5, 7A8, 7A9, 7B1, 7B2, 7B8, 7B9, 7C1, 7C2, 7D1, 7D2, 7E2-7E5, 7F1  
blind and disabled adults, 3C6.1, 7C1, 7F1, 7F2  
blind and disabled children, 3C6.1, 7A2, 7B8, 7C1, 7E2-7E4, 7F1, 7F2  
civil litigation, 2F10  
claims workloads, 2F6  
concurrent SSI and OASDI, 3C5, 3C6, 3C6.1, 7D1, 7D2  
continuation of Medicaid coverage (1619b) (SSI), 7F3-7F5  
couples, 7A2, 7C2  
diagnostic group, 7F1, 7F2  
disabled, 3C6.1, 7A1-7A5, 7A8, 7A9, 7B1, 7B2, 7B9, 7C1, 7C2, 7D1, 7D2, 7E2-7E5, 7F1  
earnings, 7D1, 7F4  
federal SSI payments, 7A1-7A5, 7B3, 7B7  
federally administered payments, 3C6.1, 7A1-7A5, 7A8, 7A9, 7B1, 7B3, 7B7  
hearing receipts, dispositions, claims pending, 2F9  
Hispanic origin, 3C8  
income, 7D1  
living arrangements, 7E5  
noncitizens, 7E6

OASDI (received concurrently with SSI), 3C5, 3C6, 7D1, 7D2  
payment distributions, 7C1, 7C2  
payments in current and constant dollars, 3C4  
race, 3C7  
representative payment, 7E4  
service delivery, 2F7  
sex, 3C7, 3C8, 7E2, 7E3, 7F2  
special SSI cash payments (1619a), 7F3-7F5  
state data, 3C5, 7B1-7B3, 7B7-7B9, 7D2, 7F5  
state supplementation, 7A1-7A5, 7B2, 7B3, 7B7  
unearned income, 7D1, 7F4

Supplementary Medical Insurance (SMI) (see Medicare)

Supplementary Medical Insurance (SMI) Trust Fund (see Trust Funds)

Survivor benefits (OASDI) (see Children (OASDI); Dependents and survivors; Disabled widows and widowers; Parents; Widowed mothers and fathers; Widows and widowers; Widows and widowers, nondisabled)

T

Tax credits (OASDI), 2A5, 2A6, 3C3

Taxable earnings (OASDI), 2A3, 2A4, 2A8, 2A9, 2A18, 2A26, 4B1, 4B2, 4B10-4B12 (see also Earnings of covered workers (OASDI))

Taxable maximum (OASDI), 2A3, 2A4, 2A8, 2A9, 2A18, 2A26, 4B4, 4B7, 4B9 (see also Covered workers (OASDI))

Taxation of OASDI benefits, 2A31, 2A32, 3C3, 4A1-4A3

Taxes (OASDI and HI)  
amounts, 4A1-4A3, 4B10-4B12  
rates, 2A3, 2A4  
state amounts, 4B10, 4B12

Temporary Assistance for Needy Families (TANF), 3C4, 9G1, 9G2 (see AFDC)

Temporary disability insurance, 3A3, 9C1

Termination of benefits (OASDI), 6F1-6F3

Time-series data (see Historical data)

Totalization (OASDI), 5M1

Transitionally insured (OASDI), 2A23

Trust Funds

Disability Insurance, 3C3, 4A2-4A4, 4A6, 5A4  
Hospital Insurance, 3C3, 4A4, 8A1  
Old-Age and Survivors Insurance, 3C3, 4A1, 4A3-4A5, 5A4  
Supplementary Medical Insurance, 3C3, 4A4, 8A2

U

Underpayments (OASDI and SSI), 2F7

Unemployment Insurance, 3A3, 9A2

---

Uniformed services, 2A1, 2A2

**V**

Veterans' programs, 3A1, 3A3, 9F1

Vocational rehabilitation services, 2A25

**W**

Wage and salary workers (OASDI) (see Covered workers (OASDI); Earnings of covered workers (OASDI))

Wage credits (OASDI), 2A1, 2A2, 2A6

Widowed mothers and fathers (OASDI)

age, 5A1.5, 5A5, 5A16, 6A3, 6D7  
awards, 6A1, 6A3, 6D6, 6D7  
beneficiary families, 5H1-5H2, 5H4  
benefit distributions, 5H3  
benefits in current and constant dollars, 3C4  
benefits paid  
    annual, 4A5  
    monthly, 5A4, 5A16, 5F6  
benefits withheld, 6E4  
entitlement based on disabled child, 5F12, 6D6  
primary insurance amount, 5F7, 5H2  
special minimum, 5A8  
qualifications for benefits, 2A22  
race, 5A1, 5A1.5, 5A6, 5A7  
sex, 5A1.5, 5A7, 5A16  
surviving divorced, 5A1.5, 5F12, 6D6, 6D7  
terminations, 6F1, 6F2

Widows and widowers (OASDI)

benefits paid  
    annual, 4A5, 4A6  
    monthly, 5A4, 5A16, 5A17, 5F1  
benefits withheld, 6E4  
foreign countries, 5J11  
qualifications for benefits, 2A22, 2A23  
state data, 5J2, 5J4  
terminations, 6F1, 6F2

Widows and widowers, disabled (see Disabled widows and widowers (OASDI))

Widows and widowers, nondisabled (OASDI)

age, 5A1.6, 5A3, 5A5, 5A10, 5A15, 5A16, 5F11, 5F13, 6A3, 6D7  
awards, 6A2, 6A3, 6D7, 6D8  
beneficiary families, 5H1, 5H2, 5H4  
benefit distributions, 5F11, 5H4, 5J9  
benefits paid, monthly, 5A16, 5A17, 5F8, 5F13  
dually entitled, 5A14, 5A15, 5G2-5G5  
limitation of benefit, 5F13  
primary insurance amount, 5F7, 5H2  
    special minimum, 5A8  
qualifications for benefits, 2A22, 2A23  
race, 5A1, 5A1.6, 5A3, 5A6, 5A7, 6A3  
sex, 5A1.6, 5A3, 5A7, 5A10, 5A16, 5F6, 5F8, 5F11, 6A3, 6D7  
state data, 5J9  
surviving divorced, 5A1.6  
with reduction for early retirement, 5A3, 5F13, 6A5

without reduction for early retirement, 5F13  
year of entitlement, 5F9

Windfall elimination provision (WEP), 2A11.1

Withheld benefits (OASDI)

by reason and type of benefit, 6E4, 6E5  
of retired workers, 6E1

Wives and husbands (OASDI)

age, 5A1.3, 5A3, 5A5, 5A10, 5A15, 5A16, 6A3, 6A5, 6D3  
awards, 6A1, 6A3, 6A5, 6D1, 6D3  
beneficiary families, 5H1-5H3  
benefit distributions, 5F3, 5H3  
benefits paid  
    annual, 4A5, 4A6  
    monthly, 5A4, 5A16, 5F1  
benefits withheld, 6E4, 6E5  
divorced, 5A1.3, 6D3  
dually entitled, 5A14, 5A15, 5G2-5G5  
entitlement based on age, 5A1.3, 5A7, 5C2, 5F1, 5F3, 6A3, 6D1, 6D3  
entitlement based on care of children, 5A1.3, 5A7, 5C2, 5F1, 6A3, 6D1, 6D3  
foreign countries, 5J11  
of disabled workers, 5A1 5A1.3, 5A5-5A7, 5A16, 5C1, 5F1, 6A1, 6A3, 6A5, 6D1, 6D3  
of retired workers, 5A1, 5A1.3, 5A5-5A7, 5A16, 5C1, 5F1, 6A1, 6A3, 6A5, 6D1, 6D3  
primary insurance amount, 5C1, 5H1  
special minimum, 5A8  
qualifications for benefits, 2A21, 2A23  
race, 5A1, 5A1.3, 5A3, 5A6, 5A7, 6A3  
sex, 5A1.3, 5A3, 5A7, 5A10, 5A16, 5C2, 6A3, 6D1  
state data, 5J2, 5J4  
terminations, 6F1-6F3  
with entitlement based on disabled child, 5A7, 5F1  
with reduction for early retirement, 5A3, 5A7, 6A5

Workloads (OASDI and SSI), 2F4-2F6, 2F8

Workers' compensation, 3A3, 9B1-9B3

Workers' compensation offset, 6E4, 6E5