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Preface

The *Supplement* is a major resource for data on our nation's social insurance and welfare programs. The majority of the statistical tables present information about programs administered by the Social Security Administration—the Old-Age, Survivors, and Disability Insurance program, known collectively as Social Security, and the Supplemental Security Income program. In addition, data are presented on the major health care programs—Medicare and Medicaid—and income-maintenance programs, such as the Food Stamp Program, Temporary Assistance for Needy Families, and Low-Income Home Energy Assistance, and other social insurance programs, including workers' compensation, unemployment insurance, temporary disability insurance, Black Lung benefits, and veterans' benefits. The *Supplement* also includes program summaries and legislative histories that help users of the data understand these programs. Data from recently discontinued disability tables can be found in the *SSI Annual Statistical Report* and the *Annual Statistical Report on the Social Security Disability Insurance Program*.

The *Supplement* has been published annually since 1940. Decisions affecting the future of Social Security are facilitated by the availability of relevant data over a long period. The data provide a base for research, policy analysis, and proposals for changing the programs. In addition to meeting the Social Security Administration's information needs, the *Supplement* strengthens the agency's ability to respond to requests for program data from congressional committees, government agencies at all levels, and the research community.

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

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

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Susan Grad
Acting Associate Commissioner
for Research, Evaluation, and Statistics

August 2005

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Social Security (OASDI)

Employment and Earnings

| | |
|--|-----------------|
| Workers in OASDI covered employment, 2003 | 154.3 million |
| Average earnings, 2003 | \$32,808 |
| Earnings required in 2004 for— | |
| 1 quarter of coverage | \$900 |
| Maximum of 4 quarters of coverage | \$3,600 |
| Earnings test exempt amounts for 2004 | |
| Under full retirement age for entire year | \$11,640 |
| For months before reaching full retirement age in 2004 | \$31,080 |
| Beginning with month of reaching full retirement age in 2004 | Test eliminated |

Program Data

| | |
|--|-----------------|
| Cost-of-living adjustment for December 2003 | 2.1 percent |
| Average monthly benefit, December 2003 | |
| Retired workers | \$922 |
| Widows and widowers, nondisabled | \$888 |
| Disabled workers | \$862 |
| Number of beneficiaries, December 2003 | |
| Old-Age, Survivors, and Disability Insurance | 47.0 million |
| Old-Age Insurance | |
| Total | 32.7 million |
| Retired workers | 29.5 million |
| Survivors Insurance | |
| Total | 6.8 million |
| Widows and widowers, nondisabled | 4.5 million |
| Disability Insurance | |
| Total | 7.6 million |
| Disabled workers | 5.9 million |
| Benefit payments, 2003 | |
| Old-Age, Survivors, and Disability Insurance | \$470.8 billion |
| Old-Age and Survivors Insurance | \$399.8 billion |
| Disability Insurance | \$70.9 billion |
| Administrative expenses, 2003 | |
| Old-Age and Survivors Insurance | |
| Amount | \$2.6 billion |
| As a percentage of total benefits paid | 0.6 percent |
| Disability Insurance | |
| Amount | \$2.0 billion |
| As a percentage of total benefits paid | 2.8 percent |

Program Trends

- About 47.0 million persons received Social Security benefits for December 2003, an increase of 594,000 (1.2 percent) since December 2002. Sixty-nine percent were retired workers and their spouses and children, and another 14 percent were survivors of deceased workers. Sixteen percent were disabled workers and their spouses and children.
- Seventy-two percent of the 29.5 million retired workers received reduced benefits because of entitlement prior to full retirement age. Relatively more women (75 percent) than men (69 percent) received reduced benefits.
- The number of beneficiaries aged 65 or older rose from 32.0 million in 1998 to 33.5 million in 2003 (4.7 percent). Beneficiaries aged 85 or older increased at a greater rate during the 5-year period (10.3 percent) from 3,873,000 in 1998 to 4,271,000 in 2003. In 2003, 40,500 centenarians were receiving Social Security.
- More than 19 million women aged 65 or older received benefits for December 2003. About 7.3 million (37.8 percent) were entitled solely to a retired-worker benefit, and another 5.7 million (29.6 percent) were dually entitled to a retired-worker benefit and a wife's or widow's benefit. About 6.3 million (32.6 percent) were receiving wife's or widow's benefits only.
- Over 3 million children under age 18 received benefits, including 1,345,000 children of deceased workers, 1,461,600 children of disabled workers, and 273,600 children of retired workers.
- About 6.8 million persons received benefits based on disability—5,874,000 disabled workers, 752,800 disabled adult children, and 209,400 disabled widows and widowers. In addition, 150,900 spouses and 1,508,400 minor and student children of disabled workers received benefits.
- Average monthly benefits for December 2003, including the 2.1 percent COLA increase, were \$922 for retired workers, \$862 for disabled workers, and \$888 for nondisabled widows and widowers. Among retired workers, benefits averaged \$1,039 for men and \$798 for women. For disabled workers, average benefits were \$966 for men and \$734 for women.
- Average monthly family benefits for December 2003 were \$1,672 for a widowed mother or father and children; \$1,455 for a disabled worker, wife, and children; and \$1,833 for a retired worker, wife, and children.
- Total OASDI benefit payments for calendar year 2003 were \$470.8 billion. Payments from the OASI trust fund were \$399.8 billion—an increase of 3.0 percent from the \$388.1 billion paid in 2002.
- Benefit payments from the DI trust fund, from which benefits are paid to disabled workers, their spouses, and children, increased by 8.0 percent from \$65.7 billion in 2002 to \$70.9 billion in 2003.
- OASDI benefit awards in calendar year 2003 totaled 4,321,800, including 1,791,300 to retired workers, 417,800 to their spouses and children and 853,000 to survivors of insured workers. Benefits were awarded to 777,500 disabled workers and to 482,100 of their spouses and children.

Supplemental Security Income

Annual Payment Adjustments

Monthly federal benefit rate, effective January 2004

Individual living in his or her own household

\$564

Couple with both members eligible

\$846

Cost-of-living adjustment

2.1 percent

Program Data

Total

Benefits paid in 2003

\$35.6 billion

Number of recipients, December 2003

7.1 million

Average benefit, December 2003

\$418.04

Federally administered payments

Benefits paid in 2003

\$34.7 billion

Number of recipients, December 2003

6.9 million

Average benefit, December 2003

\$417.16

Federal SSI payments

Benefits paid in 2003

\$30.7 billion

Number of recipients, December 2003

6.6 million

Average benefit, December 2003

\$383.59

Federally administered state supplementation

Benefits paid in 2003

\$4.0 billion

Number of recipients, December 2003

^a 2.5 million

Average benefit, December 2003

\$138.38

State-administered supplementation

Benefits paid in 2003

\$0.9 billion

Number of recipients, December 2003

^b 0.6 million

Average benefit, December 2003

\$124.38

a. Includes 2.2 million persons receiving federal SSI and state supplementation and 0.3 million persons receiving state supplementation only.

b. Includes 149,621 persons receiving state supplementation only.

Program Trends

- In December 2003, 6,902,400 persons received federally administered SSI payments—114,500 more than the previous year. Of the total, 1,989,700 (28.8 percent) were aged 65 or older; 3,953,200 (57.3 percent) were blind or disabled aged 18–64; and 959,400 (13.9 percent) were blind or disabled under age 18.
- The number of blind or disabled aged 18–64 rose by 75,500 (1.9 percent) between December 2002 and December 2003, while the number under age 18 increased by 44,600 (4.9 percent).
- During 2003, 824,000 persons were awarded federally administered payments, an increase of 6,000 from the previous year. Of the 2003 awards, 537,400 went to blind or disabled recipients aged 18–64, 179,600 to those blind or disabled under age 18, and 107,000 to recipients aged 65 or older.
- Total SSI payments were \$35.6 billion in 2003, up 3.0 percent from 2002. Federal SSI payments in 2003 were \$30.7 billion (an increase of 2.6 percent over the previous year). Federally administered state supplementation totaled \$4.0 billion (an increase of 4.8 percent); state-administered supplementation totaled \$912.0 million, an increase of 7.5 percent from the previous year's totals.

Health Care

Medicare

| | |
|---|-----------------|
| Total benefits paid in calendar year 2003 | |
| Hospital Insurance (Part A) | \$152.1 billion |
| Supplementary Medical Insurance (Part B) | \$123.8 billion |
| Number of enrollees in July 2003 (one or both of Parts A and B) | 41.1 million |
| Aged | 35.0 million |
| Disabled | 6.1 million |
| Administrative costs, 2003 | |
| Hospital Insurance | |
| Amount | \$2.5 billion |
| As a percentage of total benefits paid | 1.7 percent |
| Supplementary Medical Insurance | |
| Amount | \$2.3 billion |
| As a percentage of total benefits paid | 1.9 percent |

Medicaid

| | |
|--|-----------------|
| Medical service expenditures in fiscal year 2002 | \$213.5 billion |
| Number of unduplicated recipients, fiscal year 2002 | 49.8 million |
| Average 2002 vendor payment per unduplicated recipient | |
| Persons aged 65 or older | \$10,870 |
| Permanently and totally disabled persons | \$11,408 |
| Dependent children under age 21 | \$1,271 |
| Average 2002 vendor payment for medical services | |
| Nursing facility services | \$22,247 |
| Inpatient general hospital care | \$5,766 |
| Prescribed drugs | \$1,163 |
| Physicians services | \$378 |

Other Social Insurance Programs and Veterans' Benefits

Unemployment Insurance

| | |
|--|----------------|
| Total payments, 2003 | \$41.4 billion |
| Average— | |
| Weekly benefit amount (regular programs) | \$262 |
| Duration of benefits | 16.4 weeks |
| Weekly insured unemployment | 3.5 million |
| Covered employment | 126.1 million |

Workers' Compensation

| | |
|--|----------------|
| Benefit payments, 2002 | \$53.4 billion |
| Compensation payments | \$29.2 billion |
| Medical and hospitalization | \$24.3 billion |
| Benefits paid by— | |
| Private insurance carriers | \$29.0 billion |
| State and federal funds | \$12.5 billion |
| Employers' self-insurance | \$11.9 billion |
| Covered workers per month | 125.6 million |
| Costs as a percentage of covered payroll | 1.58 percent |

Temporary Disability Insurance

| | |
|------------------------------|-------|
| Average weekly benefit, 2001 | |
| California ^a | |
| State fund | \$288 |
| Private plans | \$449 |
| New York | |
| State fund | \$145 |
| Private plans | \$191 |

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

a. Accounts for half of the workers participating in Temporary Disability Insurance.

Black Lung Benefits

| | |
|---|-----------------|
| Basic benefit to miner or widow | \$549.00 |
| Maximum family benefit | \$1,098.00 |
| Part B (claims filed before July 1, 1973) | |
| Number of monthly benefits to miners, widows, and dependents, December 2003 | 64,237 |
| Total benefits paid, calendar year 2003 | \$411.6 million |
| Part C (claims filed July 1, 1973, or later) | |
| Total benefits paid, fiscal year 2003 | |
| Disability and survivors benefits | \$336.9 million |
| Medical benefits | \$55 million |

Veterans' Benefits

Number of veterans with disability compensation or pension, 2003

| | |
|----------------------------------|-----------|
| Service-connected disability | 2,485,000 |
| Non-service-connected disability | 347,000 |

Monthly payment in 2003 for—

| | |
|------------------------------|---------|
| Service-connected disability | |
| 10 percent disability | \$104 |
| Total disability | \$2,193 |

Non-service-connected disability (maximum payment)

| | |
|--|---------|
| Without dependent | \$807 |
| With one dependent and in need of aid and attendance | \$1,597 |

Public Assistance Programs

Temporary Assistance for Needy Families

| | |
|----------------------------|---------------|
| Total payments, 2003 | \$9.5 billion |
| Average monthly number of— | |
| Recipients | 4.9 million |
| Families | 2.0 million |
| Average monthly payment | |
| Per recipient | \$162 |
| Per family | \$393 |

Food Stamps

| | |
|---|----------------|
| Monthly benefits, beginning October 1, 2004 | |
| Four-person household with no income | \$499 |
| Standard deduction (one-person to four-person households) | \$134 |
| Fiscal year 2003 | |
| Average number of participants | 21.3 million |
| Total benefits | \$21.4 billion |

Low-Income Home Energy Assistance

| | |
|---|----------------|
| Block grants to— | |
| 50 states and the District of Columbia | \$1.65 billion |
| Puerto Rico, Virgin Islands, American Samoa, Guam, and Northern Mariana Islands | \$2.3 million |
| Direct block grants to 132 Indian tribes and tribal organizations | \$16.4 million |
| Leveraging incentive awards to— | |
| 38 states | \$19.0 million |
| 28 Indian tribes and tribal organizations | \$1.6 million |
| Residential Emergency Assistance Challenge (REACH) program awards to— | |
| 6 states | \$5.5 million |
| 7 Indian tribes and tribal organizations | \$1.0 million |
| Emergency contingency funds to— | |
| 33 states and the District of Columbia | \$99.4 million |
| 46 Indian tribes and tribal organizations | \$613 thousand |

NOTE: Funds issued by the Department of Health and Human Services in fiscal year 2002.

Poverty Data

| | |
|--|--------------|
| Weighted average poverty thresholds, 2003 | |
| Individual, aged 65 or older | \$8,825 |
| Couple, householder aged 65 or older | \$11,133 |
| Family of four | \$18,810 |
| Percentage of population with income below poverty level, 2002 | |
| All ages | 12.1 percent |
| Children under age 18 living in families | 16.2 percent |
| Persons aged 65 or older | 10.4 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 2003, 47.0 million people were receiving benefits at a rate exceeding \$39 billion each month (more than \$470 billion annually). According to the latest Social Security Trustees Report, these cash benefits made up 4.3 percent of the nation's gross domestic product. During the same year, approximately 154 million employees and self-employed workers, along with employers, contributed \$533.5 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 90 percent of those 65 or older. It is the major source of income (providing 50 percent or more of total income) for 66 percent of the beneficiaries. It contributes 90 percent or more of income for one-third of the beneficiaries and is the only source of income for 22 percent of them.

Contributions and Trust Funds

A person contributes to Social Security through either payroll taxes or self-employment taxes under the Federal Insurance Contributions Act (FICA) or the Self-Employed Contributions Act (SECA). Employers match the employee contribution, while self-employed workers pay an amount equal to the combined employer-employee contributions. (Self-employed workers receive a special tax deduction to ease the impact of paying the higher rate.) There is a maximum yearly amount of earnings subject to OASDI taxes, \$87,900 in 2004. 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 more than 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. Although physically located within the various regions, each teleservice center manages the public's Social Security business from throughout the nation using state-of-the-art communications systems. Seven program ser-

vice 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**).

Program Changes

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

Changes are often implemented in phases and often entail recurring annual changes beyond the initial enactment date or year of first implementation. Rather recent changes with a significant and recurring impact are discussed below.

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—\$30,720 in 2003, and \$31,080 in 2004. 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 \$11,520 in 2003 to \$11,640 in 2004. Withholding for beneficiaries subject to this earnings test is at \$1 for each \$2 of earnings over the exempt amounts. Proposed rules were published August 25, 2003.

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 and other support 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. Beginning January 1, 2001, former beneficiaries may have their benefits resumed if the benefits were terminated because of work, if their work activity ends within 5 years of the month their benefits stopped, and if they are still disabled.

The Ticket to Work program was phased in nationally over a 3-year period. During the first phase in 2002, SSA distributed tickets in the following 13 states: Arizona, Colorado, Delaware, Florida, Illinois, Iowa, Massachusetts, New York, Oklahoma, Oregon, South Carolina, Vermont, and Wisconsin.

During the second phase, in November 2002 through September 2003, SSA distributed tickets in the following 20 states: Alaska, Arkansas, Connecticut, Georgia, Indiana, Kansas, Kentucky, Louisiana, Michigan, Mississippi, Missouri, Montana, Nevada, New Hampshire, New Jersey, New Mexico, North Dakota, South Dakota, Tennessee, and Virginia and in the District of Columbia.

During the third phase, in November 2003 through September 2004, SSA is distributed tickets in the following 17 states: Alabama, California, Hawaii, Idaho, Maine, Maryland, Minnesota, Nebraska, North Carolina, Ohio, Pennsylvania, Rhode Island, Texas, Utah, Washington, West Virginia, Wyoming, as well as in American Samoa, Guam, the Northern Mariana Islands, Puerto Rico, and the Virgin Islands.

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 on the basis of increases in the national average wage index. Effective January 1, 2004, the level is \$810 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 \$810 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 \$1,330 in 2003 to \$1,350 in 2004.

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. The level is \$580 for 2004. 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.

Prohibitions on Payment of Title II Benefits to Persons Not Authorized to Work in the United States

The Social Security Protection Act (SSPA) of 2004, Public Law 108-203, was signed into law on March 2, 2004. Under section 211 of this legislation, certain noncitizen workers must meet additional requirements to be fully or currently insured and to establish entitlement to benefits based on the noncitizen's earnings. This law applies to Title II benefits and Medicare based on end-stage renal disease (ESRD).

Section 211 of the SSPA applies to a noncitizen worker whose Social Security number (SSN) was first assigned on or after January 1, 2004. A noncitizen worker must meet one of the following additional requirements to be fully or currently insured and to establish entitlement to any Title II benefit or end-stage renal disease (ESRD) Medicare based on the noncitizen worker's earnings:

1. The noncitizen worker must have been issued an SSN for work purposes at any time on or after January 1, 2004; or
2. The noncitizen worker must have been admitted to the United States at any time as a nonimmigrant visitor for business (B-1) or as an alien crewman (D-1 or D-2).

If a noncitizen worker whose SSN was originally assigned January 1, 2004, or later does not meet either of these additional requirements, then the worker is not fully or currently insured. This is true even if the noncitizen worker appears to have the required number of quarters of coverage (QCs) in accordance with the regular insured status provisions. Although this law applies directly to certain noncitizen workers, it also affects the entitlement of any person seeking a benefit on the record of a noncitizen who is subject to this law.

Coverage and Financing

In 2004, about 154 million persons will work 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 2004, a domestic employee must earn \$1,400 from any single employer in a calendar year before FICA is withheld. Most election workers must earn \$1,200 in 2004 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—\$87,900 in 2004—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 percent 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 multiplied by one-half the SECA tax rate. The effect of this deduction is intended to be analogous to the treatment of the FICA tax paid by the employer, which is disregarded as remuneration to the employee for FICA and income tax purposes. The second provision allows an income tax deduction equal to one-half of the amount of the SECA tax paid, which is designed to reflect the income tax deductibility of the employer's share of the FICA tax.

Table 2.A5 describes income tax credits for 1984–1989 intended to cushion the impact of increases in FICA and SECA taxes enacted in 1983. The SECA tax credits were replaced, effective 1990, by the deduction provisions described above. **Table 2.A6** outlines the history of provisions regarding appropriations from general revenues and interfund borrowing.

Insured Status

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 2004, a quarter of coverage (QC) is credited for each \$900 in annual covered earnings, up to a maximum of four QCs for the year. Earnings of \$3,600 or more in 2004 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 becomes disabled or dies. A minimum of 6 QCs is required regardless of age.

In addition to earning the minimum number of credits based on work, if the worker is a noncitizen whose SSN was first assigned on or after January 1, 2004, he or she must meet one of the following additional requirements to become eligible for his or her benefit and benefits for family members or survivors:

1. The noncitizen worker must have been issued an SSN for work purposes at any time on or after January 1, 2004; or
2. The noncitizen worker must have been admitted to the United States at any time as a nonimmigrant visitor for business (B-1) or as an alien crewman (D-1 or D-2).

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. Survivors benefits are potentially payable to a worker's children and to a widow(er) with the deceased worker's children in care.) To be currently insured, the worker must have earned 6 QCs in the 13 quarters ending with the

quarter of 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 who becomes age 31 or older must have earned at least 20 QCs among the 40 calendar quarters ending with the quarter in which the disability began. In general, workers disabled at ages 24 through 30 must have earned QCs in one-half of the calendar quarters 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. Special rules may apply if the worker had a prior period of disability.

Table 2.A7 summarizes the basic provisions concerning insured status.

International Agreements

The President is authorized to enter into international Social Security agreements (also called "totalization" agreements) to coordinate the U.S. Old-Age, Survivors, and Disability Insurance (OASDI) program with comparable programs of other countries. The United States currently has Social Security agreements in effect with 20 countries.

Social Security agreements and supplementary agreements, by effective dates

| | | | |
|-----------|------------------|----------------|------------|
| Australia | 2002 | Italy | 1978, 1986 |
| Austria | 1991, 1997 | Korea (South) | 2001 |
| Belgium | 1984 | Luxembourg | 1993 |
| Canada | 1984, 1997 | Netherlands | 1990, 2003 |
| Chile | 2001 | Norway | 1984, 2003 |
| Finland | 1992 | Portugal | 1989 |
| France | 1988 | Spain | 1988 |
| Germany | 1979, 1988, 1996 | Sweden | 1987 |
| Greece | 1994 | Switzerland | 1980, 1989 |
| Ireland | 1993 | United Kingdom | 1985, 1997 |

International Social Security agreements have two main purposes. First, they eliminate dual Social Security coverage, the situation that occurs when a person from one

country works in another country and is required to pay Social Security taxes to both countries on the same earnings. Each agreement includes rules that assign a worker's coverage to only one country.

The second goal of the agreement is to help fill gaps in benefit protection for workers who have divided their careers between the United States and another country. Such workers may fail to qualify for Social Security benefits from one or both countries because they have not worked long enough to meet minimum eligibility requirements. Under an agreement, these workers and their family members may qualify for a partial U.S. benefit based on "totalized" (that is, combined) credits from both countries. Similarly, workers may qualify for partial benefits from the foreign country 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

PIA Computation

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 from 1991 through 2004. **Table 2.A9** shows indexed earnings for workers first eligible from 1997 through 2004 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 2004, the formula provides a PIA equal to the sum of
90 percent of the first \$612 of AIME, plus
32 percent of the next \$3,077 of AIME, plus
15 percent of AIME over \$3,689.

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 FRA in 2004 is calculated using the benefit formula that applies to all workers first eligible in 2000 (the "year of attainment" of age 62). The PIA derived from that formula is then increased by the COLAs effective for December 2001, 2002, and 2003 to obtain the PIA effective at FRA. 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 10 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). Before 1981, benefits were paid in 10-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 OASDI 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 2004.

Normal PIA, based on AIME of \$800.

$$\$612 \times .90 = \$550.80$$

$$\$188 \times .32 = \$60.16$$

$$\text{PIA} = \$610.90$$

WEP PIA, based on AIME of \$800.

$$\$612 \times .40 = \$244.80$$

$$\$188 \times .32 = \$60.16$$

$$\text{PIA} = \$304.90$$

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 (1) 85 percent of AIME (or 100 percent of PIA, if larger) or (2) 150 percent of the PIA.

Like the formula for determining the PIA, the maximum family benefit formula applicable to a worker depends on the year of first eligibility (that is, the year of attainment of age 62, onset of disability, or death). Once the worker's maximum family benefit amount for the year of first eligibility is determined, it is updated in line with the COLAs.

For information on family maximum provisions, as described here, see **Table 2.A13** (comparison of family maximums to the PIAs on which they are based) and **Table 2.A14** (disability family maximums). **Table 2.A17** shows the maximum family benefit amounts applicable in cases of first eligibility before 1979.

Benefit Types and Levels

Retired and Disabled Workers

The full retirement age (FRA) is the earliest age at which an unreduced retirement benefit is payable (sometimes referred to as the "normal retirement age"). The age for full retirement benefits is scheduled to rise gradually from age 65 to age 67, 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 for those workers who reach age 62 in 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 up to 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 2002 and 7 1/2 percent for workers who reach age 62 in 2003 and 2004. The rate will 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 to 19 attending elementary or secondary school full-time, or an adult child aged 18 or older who was disabled before age 22. In addition, young spouses (that is, those under 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 before age 22. Children of retired or disabled workers can receive up to 50 percent of the worker's PIA, as can young spouses. (The benefit of a young spouse is not reduced for age.) Monthly benefits payable to the spouse and children of a retired or disabled worker are limited to a family maximum amount, as discussed earlier.

Benefits are payable to unmarried divorced spouses of retirement age who were married at least 10 years to the worker. A divorced spouse benefit is excluded from family maximum provisions. Divorced spouses aged 62 and 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). 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 after 65, the amount of reduction for each month prior to FRA is adjusted accordingly to ensure that the maximum reduction at age 60 remains 28.5 percent of the worker's PIA.

Benefits for widows and widowers are increased if the deceased worker delayed 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 aged 50 to 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, 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 FRA 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. After 2002, the annual exempt amount is indexed to the growth in average wages. The indexed amount was \$30,720 in 2003 and \$31,080 in 2004. 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. 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 \$11,520 in 2003 and \$11,640 in 2004. 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 more than 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 that 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).

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 benefits or 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.

Table 2.A31 shows the history of provisions related to taxation of Social Security benefits. **Table 2.A32** offers examples to illustrate when benefits are taxable and the amount subject to taxation.

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Supplemental Security Income

Program Overview

The Supplemental Security Income (SSI) program provides income support to persons aged 65 or older, blind or disabled adults, and blind or disabled children. Eligibility requirements and federal payment standards are nationally uniform. The 2004 federal SSI benefit rate for an individual living in his or her own household and with no other countable income is \$564 monthly; for a couple (with both husband and wife eligible), the SSI benefit rate is \$846 monthly.

Payments under SSI began in January 1974. It replaced the former federal-state adult assistance programs in the 50 states and the District of Columbia. Under SSI each eligible person is provided a monthly cash payment based on a statutory federal benefit rate. Since 1975, these rates have been increased by the same percentage, as the cost-of-living increases in OASDI benefits. If an individual or couple is living in another person's household and is receiving both food and shelter from the person in whose household they are living, the federal benefit rate is reduced by one-third. This is done instead of determining the actual dollar value of the in-kind support and maintenance.

For institutionalized persons, the eligibility requirements and payment standards depend on the type of institution. With some exceptions, inmates of public institutions are ineligible for SSI. For persons institutionalized for a complete calendar month, a maximum federal SSI payment of \$30 per month applies where (1) the institution receives a substantial part of the cost of the person's care from the Medicaid program, or (2) the institution receives payments from private health insurance on behalf of a recipient under age 18. Other eligible persons in institutions may receive up to the full federal benefit rate.

The federal payment is based on the individual's countable income. The first \$20 monthly in OASDI benefits or other earned or unearned income is not counted. Also excluded is \$65 monthly of earnings plus one-half of any earnings above \$65. For example, a person living in his or her own household, whose sole income is a \$200 monthly OASDI benefit, would receive \$384 in federal SSI payments:

$$\$564 - (\$200 - \$20) = (\$564 - \$180) = \$384.$$

A person whose income consists of \$500 in gross monthly earnings would receive \$356.50 in federal SSI payments:

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

$$\text{FBR } \$564 - \$207.50 = \$356.50 \text{ federal SSI}$$

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

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.¹

Other Eligibility Provisions

Citizenship and Residence

1972 (Public Law 92-603, enacted October 30). The individual must reside within one of the 50 states or the District of Columbia and be a citizen or an alien lawfully admitted for permanent residence or permanently residing in the United States under color of law. Persons living outside the United States for an entire calendar month lose their eligibility for such a month.

1976 (Public Law 94-241, enacted March 24). Eligibility for SSI is extended to residents of the Northern Mariana Islands, effective January 9, 1978.

1980 (Public Law 96-265, enacted June 9). The income and resources of the immigration sponsors of aliens applying for SSI are considered in determining eligibility for and the amount of payment. After allowances for the needs of the sponsor and his/her family, the remainder is deemed available for the support of the alien applicant for a 3-year period after admission to the United States for permanent residence. This provision does not apply to those who become blind or disabled after admission, to refugees, or to persons granted political asylum. (See section “Deeming of Income and Resources” for subsequent changes to sponsor-to-alien deeming provisions.)

1989 (Public Law 101-239, enacted December 19). SSI eligibility is continued for a disabled or blind child who was receiving SSI benefits while living in the United States and is now living with a parent who is a member of the U.S. Armed Forces assigned to permanent duty ashore outside the United States, but not where the parent is stationed in Puerto Rico or the territories and possessions of the United States.

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 veter-

1. This last provision was repealed in 1999 by Public Law 106-169 and replaced with a provision providing for nonpayment of benefits for up to 24 months for knowingly making false or misleading statements regarding material facts.

ans and their spouses and children. Extends eligibility for aliens receiving SSI as of August 22, 1996, (the enactment date of the law) for 1 year after the enactment date for those aliens found ineligible under the new standards.

(Public Law 104-208, enacted September 30). Amends Public Law 104-193 to add to the list of “qualified aliens” certain noncitizens (and their children) who have been battered or subjected to extreme cruelty by a spouse or parent or a member of the spouse’s or parent’s family living in the same household.

1997 (Public Law 105-18, enacted June 12). Extends eligibility for aliens receiving SSI as of August 22, 1996, until September 30, 1997, for those found ineligible under the new alien standards of Public Law 104-193.

(Public Law 105-33, enacted August 5). Further amends Public Law 104-193 to add Cuban and Haitian entrants, and the child of a parent who has been battered or subjected to extreme cruelty, to the list of qualified aliens. Provides that Cuban and Haitian entrants and Amerasian immigrants qualify for time-limited eligibility, and increases the time limit from 5 to 7 years for all time-limited categories. Additional exceptions are added for qualified aliens: (1) lawfully residing in the United States and receiving SSI benefits on August 22, 1996; and (2) lawfully residing in the United States on August 22, 1996, and meeting the definition of blind or disabled in the Social Security Act.

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

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

1998 (Public Law 105-306, enacted October 28). Permanently extends eligibility of all remaining “nonqualified aliens” who were receiving SSI 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.”

2004 (Public Law 108-203, enacted March 2). Extends SSI eligibility to blind or disabled children who are U.S. citizens living with a parent assigned to permanent U.S. military duty outside of the United States and who were not receiving SSI benefits when living in the United States. Previously, only blind or dis-

abled children who received an SSI benefit for the month before the parent reported for permanent duty abroad were eligible. Effective April 2004 for applications filed after enactment.

Other Benefits

1980 (Public Law 96-272, enacted June 17). SSI applicants and recipients are not required as a condition of eligibility to elect to receive Veterans Administration pensions under the Veterans and Survivors’ Pension Improvement Act of 1978 if the state of residence lacks a medically needy program under Title XIX.

Drug Addiction and Alcoholism (DA&A)

1972 (Public Law 92-603, enacted October 30). Any disabled individual who has been medically determined to be an alcoholic or drug addict must accept appropriate treatment, if available, in an approved facility and demonstrate compliance with conditions and requirements for treatment.

SSI payments are required to be made through a representative payee—another person or public or private agency designated by SSA to manage the recipient’s benefit on his/her behalf.

1994 (Public Law 103-296, enacted August 15). Any individual who is receiving SSI based on a disability where drug addiction or alcoholism is a contributing factor material to the finding of disability must comply with the DA&A treatment requirements. The individual must accept appropriate treatment when it is available and comply with the conditions and terms of treatment. Instances of noncompliance with the requirements result in progressively longer payment suspensions. Before payments can resume, the individual must demonstrate compliance for specific periods; 2 months, 3 months, and 6 months, respectively, for the first, second, third, and subsequent instances of noncompliance. An individual who is not in compliance with the DA&A treatment requirements for 12 consecutive months shall not be 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 \$58 (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 only be made if the services result in the recipient's return to work for a continuous period of 9 months. The work must be at the substantial gainful activity earnings level.

1984 (Public Law 98-460, enacted October 9). Authorizes the reimbursement of states for the cost of VR services provided to individuals who (1) continue to receive benefits after medical recovery because they are participating in a state VR program or (2) refuse,

without good cause, to continue in or cooperate with the VR program in which they had been participating.

1987 (Public Law 100-203, enacted December 22).

Extends the provision for continuation of payments to disabled SSI recipients who have medically recovered while enrolled in an approved vocational rehabilitation program to include blind SSI recipients.

1990 (Public Law 101-508, enacted November 5). Reimbursement authorized for the cost of vocational rehabilitation services provided in months in which the individual was not receiving federal SSI payments, if

- SSI recipient status for Medicaid eligibility purposes was retained under work incentive provisions, or
- Benefits were in suspense² status (for a reason other than cessation of disability or blindness), or
- Federally administered state supplementation was received.

Extends benefit continuation provision to disabled SSI recipients who medically recover while participating in a nonstate VR program.

1999 (Public Law 106-170, enacted December 17).

Establishes a Ticket to Work and Self-Sufficiency program that will provide SSI (and OASDI) disability beneficiaries with a ticket that can be used to obtain vocational rehabilitation services, employment services, or other support services, from an employment network (EN) of their choice.

An EN chooses one of the two EN payment options at the time it submits an application to SSA to become an EN. The chosen payment system will apply to all beneficiaries served. An EN can elect to receive payment under the:

- Outcome payment system, under which it can receive payment for up to 60 outcome payment months; or
- Outcome-milestone payment system, under which it can receive payment for up to four milestones in addition to outcome payments. These milestones must occur before the EN enters the first month for which it is eligible for an outcome payment. Four milestone payments plus 60 months of reduced outcome payments equal 85 percent of the total that would be available if the EN chose the outcome payment system.

The four milestones are based on gross earnings exceeding the substantial gainful activity level for specified months. An outcome payment month is any

month in which SSA does not pay any federal disability cash benefits to a beneficiary because of work or earnings.

Also eliminates the requirement that blind or disabled SSI recipients aged 16 through 64 be referred to the state VR agency and accept the services offered.

Continuing Disability Reviews and Eligibility Redeterminations

1994 (Public Law 103-296, enacted August 15). During each of fiscal years 1996, 1997, and 1998, requires SSA to conduct continuing disability reviews (CDRs) on a minimum of 100,000 SSI recipients. In addition, during the same period, requires SSA to redetermine the SSI eligibility of at least one-third of all child SSI recipients who reach age 18 after April 1995 during the 1-year period following attainment of age 18. Redeterminations for persons turning age 18 could count toward the 100,000 CDR requirement.

1996 (Public Law 104-193, enacted August 22). Repeals the requirement that SSA redetermine the eligibility of at least one-third of all child SSI recipients who reach age 18 after April 1995 during the 1-year period following attainment of age 18.

Requires a CDR

- At least once every 3 years for SSI recipients under age 18 who are eligible by reason of an impairment that is likely to improve, and
- Not later than 12 months after birth for recipients whose low birth weight is a contributing factor material to the determination of their disability.

Requires eligibility redetermination for all child SSI recipients eligible for the month before the month in which they attain age 18.

Requires redetermination of eligibility for children considered disabled based on an individual functional assessment and/or consideration of maladaptive behavior.

Requires the representative payee of a child SSI recipient whose continuing eligibility is being reviewed to present evidence that the recipient is receiving treatment that is considered medically necessary and available for the condition which was the basis for providing SSI benefits.

1997 (Public Law 105-33, enacted August 5). Modifies provision of Public Law 104-193 to extend from 12 to 18 months the period for redetermining the disability of children under age 18 under the new childhood disability standard.

Modifies provision of Public Law 104-193 to permit SSA to schedule a CDR for a disabled child for whom

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

low birth weight is a contributing factor material to the determination of disability, at a date after the child's first birthday if the Commissioner determines the impairment is not expected to improve within 12 months of the child's birth.

Modifies provision of Public Law 104-193 to provide SSA the authority to make redeterminations of disabled childhood recipients who attain age 18, more than 1 year after the date such recipient attains age 18.

1999 (Public Law 106-170, enacted December 17). Prohibits the initiation of a CDR during the period that a recipient is "using a ticket" under the Ticket to Work program.

Deeming of Income and Resources

1972 (Public Law 92-603, enacted October 30). Deeming occurs when the income and resources of certain family members living in the same household with the SSI recipient are considered in determining the amount of the SSI payment. These family members are the ineligible spouse of an adult recipient and the ineligible parents of a child recipient under age 21.

After deduction of personal allocations for the spouse (or parents) and for ineligible children in the home, and after application of income exclusions, any remaining income of the spouse (or parents) is added to the income of the eligible person.

1980 (Public Law 96-265, enacted June 9). Children aged 18 or older are not subject to parental deeming.

Sponsor's income and resources deemed to an alien for 3 years.

1989 (Public Law 101-239, enacted December 19). Disabled children receiving home care services under state Medicaid programs, who are ineligible for SSI because of deeming of parental income, and who received SSI benefits limited to \$30 while in a medical treatment facility, may receive the \$30 monthly allowance that would be payable if the recipient were institutionalized.

1993 (Public Law 103-152, enacted November 24). Sponsor-to-alien deeming period extended from 3 years to 5 years, effective January 1, 1994, through September 30, 1996.

Considers an ineligible spouse or parent who is absent from the household because of active military service to be a member of the household for deeming purposes.

1996 (Public Law 104-193, enacted August 22). Deeming of income and resources from an immigration sponsor to a noncitizen continues until citizenship, with exceptions for those who earn, or can be cred-

ited 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 than if they were paid the benefits when regularly due.

1984 (Public Law 98-617, enacted November 8). Offset provision expanded to allow for reduction of retroactive SSI benefits and to apply in cases of OASDI benefit reinstatement.

Proration of Benefit

1982 (Public Law 97-248, enacted September 3). Benefit for first month of eligibility to be prorated by the number of days in the month for which an application has been filed and there is eligibility.

1996 (Public Law 104-193, enacted August 22). Changes the effective date of an SSI application to the first day of the month following the date on which the application was filed or on which the individual first becomes eligible, whichever is later. This, in effect, eliminates prorated payments in initial claims.

Retrospective Monthly Accounting

1981 (Public Law 97-35, enacted August 13). Changes the method of computing the SSI benefit to one under which the benefit amount is computed on a monthly basis and is based on income and other characteristics in the previous (or second previous) month.

1984 (Public Law 98-369, enacted July 18). Changes the method of computing the SSI benefit to persons receiving Title II payments. The effect of the increased Title II income at the time of the cost-of-living increase is not delayed as it otherwise would be.

1987 (Public Law 100-203, enacted December 22). Provides an exception to retrospective monthly accounting so that amounts received under Aid to Families with Dependent Children (AFDC), foster care, refugee cash assistance, Cuban-Haitian entrant assistance, or general and child welfare assistance provided by the Bureau of Indian Affairs are counted only in the month received.

1993 (Public Law 103-66, enacted August 10). Changes the method of computing the SSI benefit to persons receiving the value of the one-third reduction. The effect of the increased value at the time of the cost-of-living increase is not delayed as it otherwise would be. Effective January 1995.

2004 (Public Law 108-203, enacted March 2). Eliminates triple counting of one-time, nonrecurring income by providing that this income will be counted only for the month that the income is received and not for any other month during the transition to retrospective monthly accounting during the first 3 months of an individual's SSI eligibility. Effective April 2005.

Uncashed Checks

1981 (Public Law 97-35, enacted August 13). States that have federally administered supplements to be credited their share of SSI checks that remain unnegotiated for 180 days.

1987 (Public Law 100-86, enacted August 10). SSI checks now unnegotiable after 1 year. States are credited their share of SSI checks after 1 year rather than 180 days.

Rounding of Payment Amounts

1982 (Public Law 97-248, enacted September 3). Cost-of-living adjustments in the federal SSI benefit and income eligibility levels are to be rounded to the next lower whole dollar, after the adjustment is calculated. Subsequent cost-of-living adjustments will be calculated on the previous year's benefit standard before rounding.

Penalties Resulting in Nonpayment of Benefits for False or Misleading Statements

1999 (Public Law 106-169, enacted December 14). Provides for the nonpayment of OASDI and SSI benefits (6, 12, and 24 months, respectively, for the first, second, and third or subsequent violations) for individuals found to have knowingly made a false or misleading statement of material fact for use in determining eligibility for benefits.

2004 (Public Law 108-203, enacted March 2). Expands the administrative sanction of nonpayment of benefits to situations where an individual has failed to disclose material information, if the person knew or should have known that such failure was misleading.

Authorizes federal courts to order a defendant convicted of defrauding Social Security, Special Veterans' Benefits, or SSI to make restitution to SSA. Restitution funds would be deposited to the trust funds or General Fund of the Treasury, as appropriate. Effective with respect to violations occurring on or after the date of enactment.

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.

Excludes death payments (for example, proceeds from life insurance) from SSI income determinations to the extent they were spent on last illness and burial.

Modifies the 1982 resource exclusion for burial funds to extend the exclusion to any burial fund of \$1,500 or less maintained separately from all other assets, thereby allowing interest to be excluded from income if retained in the fund.

1988 (Public Law 100-383, enacted August 10). Restitution payments made to Japanese internees and relocated Aleutians.

1989 (Public Law 101-239, enacted December 19). Interest on agreements representing the purchase of an excluded burial space.

Payments from the Agent Orange Settlement.

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

1990 (Public Law 101-508, enacted November 5). Earned income tax credit (including the child health insurance portion).

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

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

Payments received as state or local government relocation assistance.

Payments received under the Radiation Exposure Compensation Act.

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

1993 (Public Law 103-66, enacted August 10). Hostile fire pay to members of the uniformed services.

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

1994 (Public Law 103-286, enacted August 1). Payments to victims of Nazi persecution.

1998 (Public Law 105-285, enacted October 27). Funds made available to an SSI recipient by a state or local government or a nonprofit organization as part of the Individual Development Account demonstration project.

(Public Law 105-306, enacted October 28). In-kind gifts to children with life-threatening conditions by tax-exempt organizations not converted to cash.

The first \$2,000 annually of cash gifts by tax-exempt organizations to, or for the benefit of, individuals under age 18 with life-threatening conditions.

(Public Law 105-369, enacted November 12). Payments made under the Ricky Ray Hemophilia Relief Fund Act of 1998.

2000 (Public Law 106-554, enacted December 21). Interest on funds deposited in an individual development account.

Any adjustments made to prior payments from other federal programs to account for the error in the computation of the consumer price index during 1999.

2001 (Public Law 107-16, enacted June 7). The refundable child tax credit is excluded in determining eligibility for means-tested programs, including SSI.

2004 (Public Law 108-203, enacted March 2). Changes the calculation of infrequent and irregular income from a monthly to a quarterly basis.

Excludes from the determination of an individual's income all interest and dividend income earned on countable resources. Effective July 2004.

Permits the student earned income exclusion to apply to any individual under age 22 who is a student. Thus, students under age 22 who are married or heads of households would be eligible for the exclusion. Effective April 2005.

Excludes from the determination of income any gift to an individual for use in paying tuition or educational fees, just as grants, scholarships, and fellowships for such use are currently excluded from the determination of income. Effective June 2004.

Resources

1972 (Public Law 92-603, enacted October 30). Countable resources limited to \$1,500 or less for an individual and to \$2,250 or less for a couple.

1984 (Public Law 98-369, enacted July 18). Limit on countable resources raised by \$100 a year for individuals and \$150 a year for couples, beginning in calendar year 1985 through 1989. The respective limits would become \$2,000 for an individual and \$3,000 for a couple in 1989 and thereafter.

1999 (Public Law 106-169, enacted December 14). Includes generally in the countable resources of an individual the assets of a trust that could be used for the benefit of the individual or spouse.

General Exclusions

1972 (Public Law 92-603, enacted October 30). A home of reasonable value—established *by regulation* as

not exceeding a fair-market value of \$25,000 (\$35,000 in Alaska and Hawaii).

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

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

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

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

1976 (Public Law 94-569, enacted October 20). The recipient's home, regardless of value, is excluded from consideration in determining resources.

1977 (Public Law 95-171, enacted November 12). Assistance received under the Disaster Relief and Emergency Assistance Act of 1974 for 9 months following receipt.

1979. Reasonable value for an automobile increased by *regulation* to \$4,500 of current-market value; personal goods and household effects increased to \$2,000 of equity value.

1982 (Public Law 97-248, enacted September 3). The value, within prescribed limits, of a burial space for the recipient, spouse, and immediate family is excluded. In addition, \$1,500 each (less the value of already excluded life insurance and any amount in an irrevocable burial arrangement) may be set aside for the burial of the recipient and spouse.

1984 (Public Law 98-369, enacted July 18). The unspent portion of any retroactive Title II or Title XVI payment is excluded for 6 months following its receipt, and the individual must be given written notice of the time limit on the exclusion.

1985. *Regulations* permit exclusion, regardless of value, of an automobile needed for essential transportation or modified for a handicapped person. The \$4,500 current market value limit applies only if no automobile could be excluded based on the nature of its use.

1987 (Public Law 100-203, enacted December 22). Provides for suspension of the 1980 transfer of assets provision, in any month that it is determined that undue hardship would result.

Real property that cannot be sold for the following reasons: it is jointly owned; its sale would cause the other owner(s) undue hardship because of loss of housing; its sale is barred by a legal impediment; or the owner's reasonable efforts to sell have been unsuccessful.

Temporarily extends the 1984 exclusion of retroactive Title II and Title XVI benefits from 6 months to 9 months (the longer exclusion applies to benefits paid in fiscal years 1988 and 1989).

1988 (Public Law 100-707, enacted November 23). Removes the time limit for exclusion of disaster assistance.

2004 (Public Law 108-203, enacted March 2). Increases to 9 months and makes uniform the time period for excluding from resources amounts attributable to payments of past-due Social Security and SSI benefits and earned income and child tax credits. Effective for such payments received on or after the date of enactment.

Special Exclusions

1972 (Public Law 92-603, enacted October 30). Assets of a blind or disabled individual that are necessary to an approved plan of self-support.

Tools and other property essential to self-support (PESS), within reasonable limits. Shares of nonnegotiable stock in regional or village corporations held by natives of Alaska.

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

1988 (Public Law 100-383, enacted August 10). Restitution payments made to Japanese internees and relocated Aleutians.

1989 (Public Law 101-239, enacted December 19). Specifies that no limitation can be placed on property essential to self-support used in a trade or business, or by an individual as an employee (including the tools of a tradesperson and the machinery and livestock of a farmer).

Payments from the Agent Orange Settlement.

1990 (Public Law 101-508, enacted November 5). Earned income tax credit excluded for the month following the month the credit is received.

Payments received from a state-administered fund established to aid victims of crime excluded for a 9-month period. Individual not required to file for such benefits.

Payments received as state or local government relocation assistance excluded for a 9-month period. (The provision expired 3 years after its effective date.)

Payments received under the Radiation Exposure Compensation Act.

1993 (Public Law 103-66, enacted August 10). Makes permanent the 9-month exclusion of payments received as state or local government relocation assistance.

1994 (Public Law 103-286, enacted August 1). Payments to victims of Nazi persecution.

1996 (Public Law 104-193, enacted August 22). Dedicated financial institution accounts required to be established for large past-due benefits for disabled individuals under age 18 with a representative payee.

1998 (Public Law 105-285, enacted October 27). Funds made available to an SSI recipient by a state or local government or a nonprofit organization as part of the Individual Development Account demonstration project.

(Public Law 105-306, enacted October 28). In-kind gifts to children with life-threatening conditions by tax-exempt organizations not converted to cash.

The first \$2,000 annually of cash gifts by tax-exempt organizations to, or for the benefit of, individuals under age 18 with life-threatening conditions.

(Public Law 105-369, enacted November 12). Payments made under the Ricky Ray Hemophilia Relief Fund Act of 1998.

2000 (Public Law 106-554, enacted December 21). Funds deposited by an individual in an individual development account and the interest on those funds.

2001 (Public Law 107-16, enacted June 7). The refundable child tax credit in the month of receipt and in the following month.

2004 (Public Law 108-203, enacted March 2). Excludes grants, scholarships, fellowships, or gifts to be used for tuition or educational fees from an individual's countable resources for 9 months after the month of receipt.

Transfer-of-Assets Penalties

1980 (Public Law 96-611, enacted December 28). Assets transferred for less than fair market value for the purpose of establishing eligibility for benefits under the Social Security Act are counted as resources for 24 months after transfer.

1988 (Public Law 100-360, enacted July 1). Removes the transfer-of-assets penalty for transfers made July 1, 1988, or later.

1999 (Public Law 106-169, enacted December 14). Provides a penalty under the SSI program for the disposal of resources at less than fair market value. The penalty is a loss of benefits for up to 36 months. A

formula is provided to determine the number of months.

Presumptive and Emergency Payments and Interim Assistance Reimbursement

Presumptive Payments

1972 (Public Law 92-603, enacted October 30). A person applying on the basis of disability who meets all other criteria of eligibility, and is likely to be disabled, may receive payments for 3 months pending the disability determination.

1976 (Public Law 94-569, enacted October 20). Presumptive payment provision was extended to persons applying on the basis of blindness.

1990 (Public Law 101-508, enacted November 5). Extends the period for receipt of payments to 6 months.

Emergency Advance Payments

1972 (Public Law 92-603, enacted October 30). Any applicant who can be presumed to meet the criteria of eligibility, but has not yet been determined eligible, and who is faced with a financial emergency may receive an immediate cash advance of up to \$100.

1987 (Public Law 100-203, enacted December 22). Increases the maximum emergency advance payment amount to the maximum amount of the regular federal SSI monthly benefit rate plus, if any, the federally administered state supplementary payment.

1996 (Public Law 104-193, enacted August 22). Applicants who have a financial emergency may receive an emergency advance payment in the month of application, which, effective with this law, is always before the first month of eligibility. These advance payments are recouped by proportional reductions in the recipient's first 6 months of SSI benefits.

Interim Assistance Reimbursement

1974 (Public Law 93-368, enacted August 7). SSA may enter into agreements with the states to repay them directly for assistance payments made to an SSI applicant while his/her claim is being adjudicated. The repayment is made from the first check due to the individual. This legislation expires June 30, 1976.

1976 (Public Law 94-365, enacted July 14). The authority to repay the state for interim assistance is made permanent.

1987 (Public Law 100-203, enacted December 22). Extends interim assistance reimbursement to situations in which payments are made by states or political subdivisions to persons whose SSI payments

were suspended or terminated and who subsequently are found to be eligible for such benefits. Also clarifies that the payment from which the interim assistance reimbursement is paid must be the first payment of benefits relating to the interim period.

Medicaid Eligibility

1972 (Public Law 92-603, enacted October 30). States can provide Medicaid coverage to all recipients of SSI payments. Alternatively, they can limit coverage by applying more restrictive criteria from the state Medicaid plan in effect on January 1, 1972.

States can accept SSA determination of eligibility or make their own determination.

1976 (Public Law 94-566, enacted October 20). Preserves the Medicaid eligibility of recipients who become ineligible for cash SSI payments due to the cost-of-living increases in Social Security benefits.

1980 (Public Law 96-265, enacted June 9). Blind or disabled recipients under age 65 no longer eligible for either regular or special SSI payments because of their earnings may retain SSI recipient status for Medicaid eligibility purposes under the following 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.

1986 (Public Law 99-643, enacted November 10). The SSI recipient status for Medicaid eligibility provision of the 1980 amendments is made permanent.

Effective July 1, 1987, certain expenses are excluded from earnings when determining sufficiency of earnings to establish SSI recipient status eligibility for Medicaid purposes:

- Impairment-related work expenses of disabled persons,
- Work expenses of blind persons,
- Income required for achieving an approved self-support plan, and
- The value of publicly funded attendant care services.

Effective July 1, 1987, preserves the Medicaid eligibility of recipients who become ineligible for SSI payments because of entitlement to, or an increase in, Social Security disabled adult child benefits on or after the effective date.

Effective July 1, 1987, requires all states to provide Medicaid coverage for recipients in special SSI status (either receiving special SSI payments or in the special recipient status described for 1980) if they received Medicaid coverage the month before special SSI status.

1987 (Public Law 100-203, enacted December 22).

Effective July 1, 1988, restores or preserves the Medicaid eligibility of persons aged 60 or older who are eligible for Social Security benefits as widows or widowers (but not eligible for Medicare) and who become ineligible for SSI payments or state supplementation because of the receipt of old-age or survivors insurance benefits under Social Security.

1990 (Public Law 101-508, enacted November 5). Age limit for retention of SSI recipient status for Medicaid eligibility purposes (1980 and subsequent work incentive provisions, above) is eliminated.

Preserves the Medicaid eligibility of SSI recipients who become ineligible for payments when they become entitled to Social Security disabled widow(er)s benefits following the revised definition used for their disability.

1997 (Public Law 105-33, enacted August 5). Requires states to continue Medicaid coverage for disabled children who were receiving SSI payments as of August 22, 1996, and would have continued to be eligible for such payments except that their eligibility terminated because they did not meet the revised SSI childhood disability standard established under Public Law 104-193.

State Supplementation

1972 (Public Law 92-603, enacted October 30). States are given the option of providing supplementary pay-

ments both to recipients transferred from the state program and to those newly eligible for SSI.

States may either administer the payments themselves or have the Social Security Administration make payments on their behalf. When state supplementary payments are federally administered, the Social Security Administration makes eligibility and payment determinations for the state and assumes administrative costs.

“Hold harmless” protection, which limits a state’s fiscal liability to its share of expenditures for Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled for calendar year 1972, is provided to states electing federal administration of their supplementary plans. This provision applies only to supplementary payments that do not, on the average, exceed a state’s “adjusted payment level.” (The adjusted payment level is the average of the payments that individuals with no other income received in January 1972; it may include the bonus value of food stamps. Adjustments are provided for payments that had been below state standards.)

1973 (Public Law 93-66, enacted July 9). Provides for mandatory state supplementation as assurance against reduction of income for persons who received state assistance in December 1973 and were transferred to SSI. These supplementary payments must equal the difference between (1) the amount of the state assistance payment that the individual received in December 1973 plus other income and (2) the individual’s federal SSI payment plus other income.

1976 (Public Law 94-585, enacted October 21). After June 30, 1977, when the federal SSI payment level is increased by a cost-of-living increase, such an increase will be excluded in calculating the “hold harmless” amount.

Requires states to maintain state supplementation payments at the level of December 1976 (“maintenance of payments”) or to continue to pay in supplements the same total annual amounts (“maintenance of expenditures”) when the federal SSI payment level is increased and thereby pass through any increases in federal benefits without reducing state supplements.

1982 (Public Law 97-248, enacted September 3). Begins a 3-year phase out of “hold harmless” protection. Effective with fiscal year 1985, Wisconsin and Hawaii (the only remaining “hold harmless” states) assumed the full cost of their supplementary payments.

1983 (Public Law 98-21, enacted April 20). Federal pass-through law is adjusted (1) by substituting the state supplementary payment levels in effect in

March 1983 for those in effect in December 1976 as the levels that states must maintain in complying with the pass-through requirements, and (2) with regard to the \$20 (individual) and \$30 (couple) increase in the federal SSI standard in July 1983, by requiring states to pass through only as much as would have been required if the SSI cost-of-living adjustment had been made in July 1983.

1987 (Public Law 100-203, enacted December 22). Provides for federal administration of state supplements to residents of medical institutions.

Provides for required pass through of \$5 increase in federal rate for persons whose care in institutions is paid in substantial part by Medicaid.

1993 (Public Law 103-66, enacted August 10). Requires states to pay fees for federal administration of their state supplementation payments. The fees are \$1.67 for each monthly supplementary payment in fiscal year 1994, \$3.33 in fiscal year 1995, and \$5.00 in fiscal year 1996. Fees for subsequent fiscal years will be \$5.00 or another amount determined by the commissioner to be appropriate. The commissioner may charge the states additional fees for services they request that are beyond the level customarily provided in administering state supplementary payments.

1997 (Public Law 105-33, enacted August 5). Revises the schedule of per-payment fees for federal administration of state supplementation for fiscal years 1998 (\$6.20) through 2002 (\$8.50) and provides a formula for determining the fee beyond fiscal year 2002.

1999 (Public Law 106-170, enacted December 17). A state that has an agreement with SSA to administer its supplementation payments must remit both payments and fees prior to the SSI payment date.

2000 (Public Law 106-554, enacted December 21). Changes the effective date of above provision from 2009 to 2001.

Overpayment Recovery

1984 (Public Law 98-369, enacted July 18). Limits the rate of recovering overpayments from monthly payments to the lesser of (1) the monthly payment or (2) 10 percent of a recipient’s monthly income. Permits a higher or lower adjustment at the request of the recipient subject to the agreement of the Commissioner. The limit does not apply if fraud, willful misrepresentation, or concealment of material information was involved on the part of the recipient or spouse in connection with the overpayment.

Waives recovery of certain overpayments due to amount of excess resources of \$50 or less.

Provides temporary authority for the recovery of overpayments from tax refunds.

1988 (Public Law 100-485, enacted October 13). Grants permanent authority to recover overpayments from tax refunds.

1998 (Public Law 105-306, enacted October 28). Authorizes SSA to collect SSI overpayments by offsetting Social Security benefits, with a maximum monthly offset of no more than 10 percent of the Social Security benefit.

1999 (Public Law 106-169, enacted December 14). Makes representative payees liable for an SSI overpayment caused by a payment made to a recipient who has died, and requires SSA to establish an overpayment control record under the representative payee's Social Security number.

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

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

2001 (Public Law 107-16, enacted June 7). Subjects one-time tax refund payments provided under this Act to overpayment recovery under tax refund offset provisions.

2004 (Public Law 108-203, enacted March 2). Provides for recovery of overpayment of SSI benefits by withholding from OASDI and Special Veterans' Benefits up to 100 percent of any underpayment of benefits and 10 percent of ongoing monthly benefits.

Also provides for recovery of overpayment of OASDI or Special Veterans' Benefits by withholding from SSI up to 100 percent of any underpayment of benefits but limits any recovery from SSI benefits to the lesser of 100 percent of the monthly benefit or 10 percent of the individual's total monthly income.

Effective with respect to overpayments that are outstanding at the time of enactment.

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Medicare

The following are brief summaries of complex subjects. They should be used only as overviews and general guides to the Medicare and Medicaid programs. The views expressed herein do not necessarily reflect the policies or legal positions of the Centers for Medicare & Medicaid Services (CMS) or the Department of Health and Human Services (DHHS). 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.¹

Overview

Title XVIII of the Social Security Act, designated "Health Insurance for the Aged and Disabled," is commonly known as Medicare. As part of the Social Security Amendments of 1965, the Medicare legislation established a health insurance program for aged persons to complement the retirement, survivors, and disability insurance benefits under Title II of the Social Security Act.

When first implemented in 1966, Medicare covered most persons aged 65 and over. In 1973, the following groups also became eligible for Medicare benefits: persons entitled to Social Security or Railroad Retirement disability cash benefits for at least 24 months, most persons with end-stage renal disease (ESRD), and certain otherwise noncovered aged persons who elect to pay a premium for Medicare coverage. The Medicare, Medicaid, and State Children's Health Insurance Program (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 third part of Medicare, sometimes known as Part C, is the Medicare Advantage program, which was established as the Medicare+Choice program by the Balanced Budget Act (BBA) of 1997 (Public Law 105-33) and subsequently renamed and modified by the Medicare Prescription Drug, Improvement, and Modernization

Act (MMA) of 2003 (Public Law 108-173). The Medicare Advantage program expands beneficiaries' options for participation in private-sector health care plans.

The MMA also established a fourth part of Medicare: a new prescription drug benefit, also known as Part D, beginning in 2004. Part D activities are handled within the SMI trust fund but in an account separate from Part B. It should thus be noted that the traditional treatment of "SMI" and "Part B" as synonymous is no longer accurate, since SMI now consists of Parts B and D. The purpose of the two separate accounts within the SMI trust fund is to ensure that funds from one part are not used to finance the other.

When Medicare began on July 1, 1966, approximately 19 million people enrolled. In 2004, almost 42 million are enrolled in either Part A or Part B or both parts of the Medicare program, and about 5 million of them have chosen to participate in a Medicare Advantage plan.

Coverage

Part A is generally provided automatically and free of premiums to persons aged 65 and over who are eligible for Social Security or Railroad Retirement benefits, whether they have claimed these monthly cash benefits or not. Also, workers and their spouses with a sufficient period of Medicare-only coverage in federal, state, or local government employment are eligible beginning at age 65. Similarly, individuals who have been entitled to Social Security or Railroad Retirement disability benefits for at least 24 months, and government employees with Medicare-only coverage who have been disabled for more than 29 months, are entitled to Part A benefits. Part A coverage is also provided to insured workers with ESRD (and to insured workers' spouses and children with ESRD), as well as to some otherwise ineligible aged and disabled beneficiaries who voluntarily pay a monthly premium for their coverage. In 2003, Part A provided protection against the costs of hospital and specific other medical care to about 41 million people (35 million aged and 6 million disabled enrollees). Part A benefit payments totaled \$152.1 billion in 2003.

The following health care services are covered under Part A:

- Inpatient hospital care coverage includes costs of a semiprivate room, meals, regular nursing services, operating and recovery rooms, intensive care, inpatient prescription drugs, laboratory tests, X-rays, psychiatric hospitals, inpatient rehabilitation, and long-

1. These summaries were prepared by Earl Dirk Hoffman Jr., Barbara S. Klees, and Catherine A. Curtis, Office of the Actuary, Centers for Medicare & Medicaid Services, 7500 Security Blvd., Baltimore, MD 21244. The authors wish to express their gratitude to Mary Onnis Waid, who originated these summaries and diligently prepared them for many years before her retirement.

term care hospitalization when medically necessary, as well as all other medically necessary services and supplies provided in the hospital. An initial deductible payment is required of beneficiaries who are admitted to a hospital, plus copayments for all hospital days following day 60 within a benefit period (described later).

- Skilled nursing facility (SNF) care is covered by Part A only if it follows within 30 days (generally) of a hospitalization of 3 days or more and is certified as medically necessary. Covered services are similar to those for inpatient hospital 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 through 100. Part A does not cover nursing facility care if the patient does not require skilled nursing or skilled rehabilitation services.
- Home health agency (HHA) care is covered by Parts A and B. The BBA transferred from Part A to Part B those home health services furnished on or after January 1, 1998, that are unassociated with a hospital or SNF stay. Part A will continue to cover the first 100 visits following a 3-day hospital stay or a SNF stay; Part B covers any visits thereafter. Home health care under Parts A and B has no copayment and no deductible.

HHA care, including care provided by a home health aide, may be furnished part-time by an HHA in the residence of a homebound beneficiary, if intermittent or part-time skilled nursing or certain other therapy or rehabilitation care or both 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 Part B of Medicare. There must be a plan of treatment and periodical review by a physician. Full-time nursing care, food, blood, and drugs are not provided as HHA services.

- Hospice care is a service provided to terminally ill persons with life expectancies of 6 months or less who elect to forgo the standard Medicare benefits for treatment of their illness and to receive only hospice care for it. Such care includes pain relief, supportive medical and social services, physical therapy, nursing services, and symptom management. However, if a hospice patient requires treatment for a condition that is not related to the terminal illness, Medicare will pay for all covered services necessary for that condition. The Medicare beneficiary pays no deductible for the hospice program but does pay small coinsurance amounts for drugs and inpatient respite care.

An important Part A component is the benefit period, which starts when the beneficiary first enters a hospital and ends when there has been a break of at least 60 consecutive days since inpatient hospital or skilled nursing care was provided. There is no limit to the number of benefit periods covered by Part A during a beneficiary's lifetime; however, inpatient hospital care is normally limited to 90 days during a benefit period, and copayment requirements (detailed later) apply for days 61 through 90. If a beneficiary exhausts the 90 days of inpatient hospital care available in a benefit period, the beneficiary can elect to use days of Medicare coverage from a nonrenewable "lifetime reserve" of up to 60 (total) additional days of inpatient hospital care. Copayments are also required for such additional days.

All citizens (and certain legal aliens) aged 65 and over, and all disabled persons entitled to coverage under Part A, are eligible to enroll in Part B on a voluntary basis by payment of a monthly premium. Almost all persons entitled to Part A choose to enroll in Part B. In 2003, Part B provided protection against the costs of physician and other medical services to about 38 million people (33 million aged and 5 million disabled). Part B benefits totaled \$123.8 billion in 2003.

Part B 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 SNF), 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 Part A;
- 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 DME for home use, such as oxygen equipment and wheelchairs, prosthetic devices, and surgical dressings, splints, and casts; and
- 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. Part B services are generally subject to a deductible and coinsurance (see next section). Certain medical services and related care are subject to special payment rules, including deductibles (for blood), maximum approved amounts (for Medicare-approved physical, speech, or occupational therapy services performed in settings other than hospitals), and higher cost-sharing requirements (such as those for outpatient treatments for mental illness).

Medicare Advantage (Part C) is an expanded set of options for the delivery of health care. Although all Medicare beneficiaries can receive their benefits through the original fee-for-service program, most beneficiaries enrolled in Parts A and B can choose to participate in a Medicare Advantage plan instead. Organizations that seek to contract as Medicare Advantage plans must meet specific organizational, financial, and other requirements. Following are the primary Medicare Advantage plans:

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

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

Beginning in 2006, a new regional Medicare Advantage plan program will be established that allows regional coordinated care plans to participate in the Medicare Advantage program. Between 10 and 50 regions will be established, and plans wishing to participate must serve an entire region. There are provisions to encourage plan participation, and a fund will be established that can be used to encourage plan entry and limit plan withdrawals.

For individuals entitled to Part A or enrolled in Part B (except those entitled to Medicaid drug coverage), the new Part D initially provides access to prescription drug discount cards, at a cost of no more than \$30 annually. For low-income beneficiaries, Part D initially provides transitional financial assistance (of up to \$600 per year) for purchasing prescription drugs, plus a subsidized enrollment fee for the discount cards. This temporary plan, which began in mid-2004, will be phased out in 2006.

Beginning in 2006, Part D will provide subsidized access to prescription drug insurance coverage on a voluntary basis, upon payment of a premium, to individuals entitled to Part A or enrolled in Part B, with premium and cost-sharing subsidies for low-income enrollees. Beneficiaries may enroll in either a stand-alone prescription drug plan (PDP) or an integrated Medicare Advantage plan that offers Part D coverage. (Late enrollment penalties may apply under certain circumstances.)

Part D coverage includes most prescription drugs and biologicals approved by the Food and Drug Administration (FDA). (The specific drugs currently covered in Parts A and B will remain covered.) Part D coverage can consist of either standard coverage (defined later) or an alternative design that provides the same actuarial value. (However, the specific actuarial equivalence test leaves very little flexibility for plans to design alternative coverage.) For an additional premium, plans may also offer supplemental coverage exceeding the value of basic coverage.

To encourage employer and union plans to continue to offer prescription drug coverage to Medicare retirees, Part D also provides for certain subsidies to those plans that meet specific criteria.

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

Program Financing, Beneficiary Liabilities, and Provider Payments

All financial operations for Medicare are handled through two trust funds, one for HI (Part A) and one for SMI (Parts B and D). These trust funds, which are special accounts in the U.S. Treasury, are credited with all receipts and charged with all expenditures for benefits and administrative costs. The trust funds cannot be used for any other purpose. Assets not needed for the payment of costs are invested in special Treasury securities. The following sections describe Medicare's financing provisions, beneficiary cost-sharing requirements, and the basis for determining Medicare reimbursements to health care providers.

Program Financing

The HI trust fund is financed primarily through a mandatory payroll tax. Almost all employees and self-employed workers in the United States work in employment covered by Part A and pay taxes to support the cost of benefits for aged and disabled beneficiaries. The Part A tax rate is 1.45 percent of earnings, to be paid by each employee and a matching amount by the employer for each employee, and 2.90 percent for self-employed persons. Beginning in 1994, this tax is paid on all covered wages and self-employment income without limit. (Prior to 1994, the tax applied only up to a specified maximum amount of earnings.) The Part A tax rate is specified in the Social Security Act and cannot be changed without legislation.

Part A also receives income from the following sources: (1) a portion of the income taxes levied on Social Security benefits paid to high-income beneficiaries, (2) premiums from certain persons who are not otherwise eligible and choose to enroll voluntarily, (3) reimbursements from the general fund of the U.S. Treasury for the cost of providing Part A coverage to certain aged persons who retired when Part A began and thus were unable to earn sufficient quarters of coverage (and those federal retirees similarly unable to earn sufficient quarters of Medicare-qualified federal employment), (4) interest earnings on its invested assets, and (5) other small miscellaneous income sources. The taxes paid each year are used mainly to pay benefits for current beneficiaries.

The SMI trust fund differs fundamentally from the HI trust fund with regard to the nature of its financing. As previously noted, SMI is now composed of two parts, Part B and Part D, each with its own separate account within the SMI trust fund. The nature of the financing for both parts of SMI is similar, in that both parts are primarily

financed by beneficiary premiums and contributions from the general fund of the U.S. Treasury.

Part B is financed through premium payments (\$78.20 per month per beneficiary in 2005) and contributions from the general fund of the U.S. Treasury. (Penalties for late enrollment may apply.) 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 Part B income.

Similarly, in 2006, Part D will be financed primarily through premium payments and contributions from the general fund of the U.S. Treasury, with general fund contributions accounting for the largest source of Part D income, since beneficiary premiums are to represent, on average, 25.5 percent of the cost of standard coverage (as described in the next section). The premiums and general fund contributions for Part D will be determined separately from those for Part B. (In 2004 and 2005, the general fund of the U.S. Treasury will finance the transitional assistance benefit for low-income beneficiaries by providing funds to a transitional assistance account within the SMI trust fund. The proceeds will be transferred to the Part D account at the conclusion of the temporary program.)

The SMI trust fund also receives income from interest earned on its invested assets, as well as from a small amount of miscellaneous income. For Parts B and D each, beneficiary premiums and general fund payments are redetermined annually to match estimated program costs for the following year. (Beginning in 2007, the Part B premium will be increased for beneficiaries meeting certain income thresholds.)

Capitation payments to Medicare Advantage plans are financed from the HI trust fund and the Part B account within the SMI trust fund, in proportion to the relative weights of Parts A and B benefits to the total benefits paid by the Medicare program.

Beneficiary Payment Liabilities

Fee-for-service beneficiaries are responsible for charges not covered by the Medicare program and for various cost-sharing aspects of Parts A and B. These liabilities may be paid (1) by the Medicare beneficiary; (2) by a third party, such as an employer-sponsored retiree health plan or private Medigap insurance; or (3) by Medicaid, if the person is eligible. *Medigap*, or Medicare supplemental insurance, is sold by private insurance companies to pay, within limits, most of the health care service charges not covered by Parts A or B of Medicare. These policies, which must meet federally imposed standards, are

offered by Blue Cross and Blue Shield and various commercial health insurance companies.

For beneficiaries enrolled in Medicare Advantage plans, payment 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 Part A, a beneficiary's fee-for-service payment includes a one-time deductible amount at the beginning of each benefit period (\$912 in 2005). This deductible covers 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 (\$228 per day in 2005) are required through day 90 of a benefit period. Each Part A beneficiary also has a "lifetime reserve" of 60 additional hospital days that may be used when the covered days within a benefit period have been exhausted. Lifetime reserve days may be used only once, and coinsurance payments (\$456 per day in 2005) are required.

For skilled nursing care covered under Part A, Medicare fully covers the first 20 days of care in a benefit period. But for days 21 through 100, a copayment (\$115 per day in 2005) is required from the beneficiary. After 100 days of SNF care per benefit period, Medicare pays nothing. Home health care requires no deductible or coinsurance payment by the beneficiary. In any Part A service, the beneficiary is responsible for fees to cover the first 3 pints or units of nonreplaced blood per calendar year. The beneficiary has the option of paying the fee or of having the blood replaced.

There are no premiums for most people covered by Part A. Eligibility is generally earned through the work experience of the beneficiary or of the beneficiary's spouse. However, most aged people who are otherwise ineligible for premium-free Part A coverage can enroll voluntarily by paying a monthly premium, if they also enroll in Part B. For people with fewer than 30 quarters of coverage as defined by the Social Security Administration (SSA), the Part A monthly premium rate is \$375 in 2005; for those with 30 to 39 quarters of coverage, the rate is reduced to \$206. Voluntary coverage upon payment of the Part A premium, with or without enrolling in Part B, is also available to disabled individuals for whom cash benefits have ceased because of earnings in excess of those allowed for receiving cash benefits. (Penalties for late enrollment may apply.)

For Part B, the beneficiary's payment share includes the following: one annual deductible (\$110 in 2005),

monthly premiums, coinsurance payments for Part B 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 not covered by Medicare. For outpatient mental health treatment services, the beneficiary is liable for 50 percent of the approved charges.

For Part D, standard coverage in 2006 includes a \$250 deductible, with 25 percent coinsurance (or other actuarially equivalent amounts) for drug costs above the deductible and below an initial coverage limit of \$2,250. The beneficiary is then responsible for all costs until a \$3,600 out-of-pocket limit is reached. For higher costs, there is catastrophic coverage that requires enrollees to pay the greater of 5 percent coinsurance or a small copay (\$2 for generic or preferred brands and \$5 for any other drug). After 2006, these benefit parameters are indexed to the growth in per capita spending in Part D. When determining out-of-pocket costs, only those amounts actually paid by the enrollee or another individual (and not reimbursed through insurance) are counted. The exception to this provision is cost-sharing assistance from Medicare's low-income subsidies and from state Pharmacy Assistance programs. The monthly premiums required for Part D coverage are described in the previous section.

Provider Payments

Before 1983, Part A 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, which is 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 Part A-covered inpatient hospital services for the stay; in other cases it is more. The hospital absorbs the loss or makes a profit. Certain payment adjustments exist for extraordinarily costly inpatient hospital stays. Payments for skilled nursing care, home health care, inpatient rehabilitation, and long-term hospital care are made under separate prospective payment systems. Payments for psychiatric hospital care are currently reimbursed on a reasonable cost basis, but a prospective payment system is expected to be implemented in the near future, as required by the BBA.

For Part B, before 1992, physicians were paid on the basis of reasonable charge. This amount was initially defined as the lowest of (1) the physician's actual charge, (2) the physician's customary charge, or (3) the prevailing charge for similar services in that locality. Beginning

January 1992, allowed charges 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 that is in place under Part A.

If a doctor or supplier agrees to accept the Medicare-approved rate as payment in full (“takes assignment”), then payments provided must be considered as payments in full for that service. The provider may not request any added payments (beyond the initial annual deductible and coinsurance) from the beneficiary or insurer. If the provider does not take assignment, the beneficiary will be charged for the excess (which may be paid by Medigap insurance). Limits now exist on the excess that doctors or suppliers can charge. Physicians are “participating physicians” if they agree before the beginning of the year to accept assignment for all Medicare services they furnish during the year. Since Medicare beneficiaries may select their doctors, they have the option to choose those who participate.

Medicare payments to Medicare Advantage 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 on the basis of 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. As previously mentioned, the Medicare Advantage program will undergo changes beginning in 2006. Plan bids will be replacing the current payment structure for Medicare Advantage plans.

For Part D, in 2006 and later, PDPs (including the prescription drug portion of Medicare Advantage plans) will pay for most FDA-approved prescription drugs and biologicals under the benefit structure described in the previous section. Plans may set up formularies for their prescription drug coverage, subject to statutory standards.

Claims Processing

Medicare’s Part A and Part B fee-for-service claims are processed by nongovernment organizations or agencies that contract to serve as the fiscal agent between providers and the federal government. These claims processors are known as intermediaries and carriers. They

apply the Medicare coverage rules to determine the appropriateness of claims.

Medicare intermediaries process Part A claims for institutional services, including inpatient hospital claims, SNFs, HHAs, and hospice services. They also process outpatient hospital claims for Part B. Examples of intermediaries are Blue Cross and Blue Shield (which utilizes its plans in various states) and other commercial insurance companies. Intermediaries’ responsibilities include the following:

- Determining costs and reimbursement amounts,
- Maintaining records,
- Establishing controls,
- Safeguarding against fraud and abuse or excess use,
- Conducting reviews and audits,
- Making the payments to providers for services, and
- Assisting both providers and beneficiaries as needed.

Medicare carriers handle Part B claims for services by physicians and medical suppliers. Examples of carriers are the Blue Shield plans in a state, and various commercial insurance companies. Carriers’ responsibilities include the following:

- Determining charges allowed by Medicare,
- Maintaining quality-of-performance records,
- Assisting in fraud and abuse investigations,
- Assisting both suppliers and beneficiaries as needed, and
- Making payments to physicians and suppliers for services that are covered under Part B.

Claims for services provided by Medicare Advantage plans (that is, claims under Part C) are processed by the plans themselves.

Once Part D begins in earnest in 2006, plans will be responsible for claims processing, as is the case under Part C. However, there are a number of complex Part D claims processing provisions, and the administration of some of these provisions is not yet fully resolved. Future versions of the *Supplement* will address these issues as they unfold.

Quality improvement organizations (QIOs; formerly called peer review organizations, or PROs) are groups of practicing health care professionals who are paid by the federal government to generally oversee the care provided to Medicare beneficiaries in each state and to

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

Administration

The Department of Health and Human Services (DHHS) 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 (and, beginning in 2006, Part D premiums) from the Social Security benefit checks, 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 Part A 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. Each year, around the first day of April, the Board of Trustees reports to Congress on the financial and actuarial status of the Medicare trust funds.

State agencies (usually state health departments under agreements with CMS) identify, survey, and inspect provider and supplier facilities and institutions wishing to participate in the Medicare program. In consultation with CMS, these agencies then certify the facilities that are qualified.

Data Summary

The Medicare program covers 95 percent of our nation's aged population, as well as many people who are on Social Security because of disability. In 2003, Part A covered about 41 million enrollees with benefit payments of \$152.1 billion, and Part B covered about 38 million enrollees with benefit payments of \$123.8 billion. Administra-

tive costs for Parts A and B were less than 2 percent of disbursements in 2003. Total disbursements for Medicare in 2003 were \$280.8 billion.

Note: Medicare enrollment data are based on estimates prepared for the 2004 annual report of the Medicare Board of Trustees to Congress (available on the Web at <http://www.cms.hhs.gov/publications/trusteesreport/>). Medicare benefits, administrative costs, and total disbursements for 2003 are actual amounts for the calendar year, as reported by the Department of the Treasury.

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Medicare: History of Provisions

This section is a summary of select Medicare provisions, based on general interest. It should be used only as a broad overview of the history of the provisions of the Medicare program. This section does not render any legal, accounting, or other professional advice and is not intended to explain fully all the provisions and exclusions of the relevant laws, regulations, and rulings of the Medicare program. Original sources of authority should be researched and utilized.

Insured Status

Entitlement to Medicare Part A (also known as Hospital Insurance, or HI) Benefits

- 1965.** Individual aged 65 or older entitled to monthly benefits under the Social Security or Railroad Retirement program, or aged 65 before 1968, or 3 quarters of coverage (QC) after 1965 and before attainment of age 65.
- 1967.** 3 QC for each year after 1966 and before attainment of age 65.
- 1972.** Disabled individual, under 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.

Individual aged 65 or older enrolled in the Part B program who is not otherwise entitled to HI benefits, upon voluntary participation with payment of HI premium.

1980. Individual who would be entitled to monthly benefits under the Social Security or Railroad Retirement program if application were made.

Disabled individual under age 65 entitled to disability benefits for at least 24 months, not necessarily consecutive, under the Social Security or Railroad Retirement program.

Coverage extended for up to 36 months for disabled individuals whose disability continues, but whose monthly benefit ceased because they engaged in substantial gainful activity.

Second waiting period eliminated if a former disabled-worker beneficiary becomes entitled again within 5 years (7 years for disabled widows and widowers and disabled children aged 18 or older).

1982. Federal employees covered under HI based on QC for earnings as federal employees and/or based on deemed QC for earnings as federal employees before 1983.

1983. Employees of nonprofit organizations, effective January 1, 1984.

1986. Mandatory coverage for state and local government employees not covered under Social Security and hired after March 31, 1986.

1987. Second waiting period eliminated if a former disabled beneficiary becomes entitled again (no time limit).

1989. Disabled individuals under 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 Supplementary Medical Insurance (SMI) Part B premiums.

2000. The 24-month waiting period (otherwise required for an individual to establish Medicare eligibility on the basis of a disability) is waived for persons with amyotrophic lateral sclerosis, effective July 1, 2001. The entitlement to Medicare begins with the first month of the Social Security Administration's determination of eligibility for Disability Insurance benefits.

Entitlement to Medicare Part B (also known as Supplementary Medical Insurance Part B Account, or SMI Part B) Benefits

1965. U.S. resident (citizen or lawfully admitted alien with 5 years continuous residence) aged 65 or older or

any individual entitled to HI benefits, upon voluntary participation with payment of Part B premium.

1972. Individual under age 65 entitled to HI benefits, upon voluntary participation with payment of Part B premium.

Entitlement to Medicare Part D (also known as Supplementary Medical Insurance Part D Account, or SMI Part D) Benefits

2003. For temporary Medicare-endorsed prescription drug discount card program (as a prelude to the new Part D prescription drug program), individual entitled or enrolled under Part A or enrolled in Part B, upon voluntary participation with payment of up to \$30 annual enrollment fee. Under a Transitional Assistance provision, beneficiary whose income does not exceed 135 percent of the federal poverty level and does not have third-party prescription drug coverage is entitled to further benefits. Enrollment begins in May 2004, access to discounts begins in June 2004, and program phases out as drug benefit becomes available in 2006 (see next entry).

Beginning January 1, 2006, individual entitled to benefits under Part A or enrolled under Part B, upon voluntary enrollment in either a stand-alone prescription drug plan (PDP) or an integrated Medicare Advantage (MA) plan that offers Part D coverage in its benefit package.

Medicare Benefits

Under Part A

1965. In each benefit period, inpatient hospital services, 90 days. Includes semiprivate accommodations, operating room, hospital equipment (including renal dialysis), laboratory tests and X-ray, drugs, dressings, general nursing services, and services of interns and residents in medical osteopathic or dentistry training. Inpatient psychiatric hospital care limited to 190-day lifetime maximum. Outpatient hospital diagnostic services. Post-hospital extended-care services, 100 days (including physical, occupational, and speech therapy). Post-hospital home health services, 100 visits. Deductible and coinsurance provisions (see Table 2.C1).

1967. Lifetime reserve of 60 additional days of inpatient hospital services. Outpatient hospital diagnostic services transferred to SMI.

1972. Services of interns and residents in podiatry training.

1980. Unlimited home health visits in a year. Requirement for prior hospitalization eliminated. Home

health services provided for up to 4 days a week and up to 21 consecutive days.

Alcohol detoxification facility services.

1981. Part A coinsurance is based on the deductible for the calendar year in which services are received rather than the deductible in effect at the time the beneficiary's spell of illness began, starting in 1982.

Alcohol detoxification facility services eliminated.

1982. Beneficiaries expected to live 6 months or less may elect to receive hospice care benefits instead of other Medicare benefits. May elect maximum of two 90-day and one 30-day hospice care periods, effective November 1, 1983, to October 1, 1986.

1984. For durable medical equipment provided by home health agencies, the payment amount is reduced from 100 percent of costs to 80 percent of reasonable charges.

1986. Set the Part A deductible for 1987 at \$520 with resulting increases in cost sharing. Increased the Part A deductible annually by the applicable percentage increase in the hospital prospective payment rates.

Hospice care benefit (enacted in 1982) made permanent.

1987. Specifies in law that to be eligible for home health care, a Medicare beneficiary must have a restricted ability to leave the home, requiring the assistance of another or the aid of a supportive device (such as crutches, a cane, a wheelchair, or a walker).

1988. Enrollee pays annual hospital deductible (set at \$560 for 1989) and Medicare pays balance of covered charges, regardless of the number of days of hospitalization (except for psychiatric hospital care, which is still limited by 190-day lifetime maximum).

The number of days in a skilled nursing facility changed to 150 per year. Deletes the requirement for a prior hospital stay of 3 or more consecutive days.

Expands home health care to provide care for less than 7 days per week and up to 38 consecutive days.

Hospice care extended beyond 210 days when beneficiary is certified as terminally ill.

All 1988 provisions became effective January 1, 1989.

1989. The spell of illness and benefit period coverage of laws 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 are covered under SMI program. HI program affected mainly by two of the initiatives: (1) annual prostate cancer screening for male beneficiaries aged 50 or older, effective January 1, 2000; and (2) colorectal screening procedures, including fecal-occult blood tests and flexible sigmoidoscopies, for beneficiaries aged 50 and older, colonoscopy for beneficiaries at high risk for colorectal cancer, and other procedures, including screening barium enemas under certain circumstances.

2000. The homebound criterion for home health services is clarified to specify that beneficiaries who require home health services may attend adult day care for therapeutic, psychosocial, or medical treatment and still remain eligible for the home health

benefit. Homebound beneficiaries may also attend religious services without being disqualified from receiving home health benefits.

Screening colonoscopies are covered for all beneficiaries, not just for those at high risk, beginning July 1, 2001. For persons not at high risk, a screening colonoscopy is covered 10 years after a previous one, or 4 years after a screening flexible sigmoidoscopy. (See 1997.)

Under Part B

1965. Physician and surgeon services. In-hospital services of anesthesiologists, pathologists, radiologists, and psychiatrists. Limited dental services. Home health services, 100 visits in calendar year. Other medical services including various diagnostic tests, limited ambulance services, prosthetic devices, rental of durable medical equipment used at home (including equipment for dialysis), and supplies used for fractures. For deductible and coinsurance provisions, see Table 2.C1.

Beginning in 1966, the beneficiary pays a \$50 deductible, with a 3-month carryover provision.

1967. Outpatient hospital diagnostic services transferred from HI. Includes physical therapy services in a facility. Purchase of durable medical equipment.

1972. Physical therapy services furnished by a therapist in his or her office or individual's home (calendar year limit of \$100). Chiropractor services (limited to manual manipulation of the spine). Outpatient services include speech pathology services furnished in, or under arrangements with, a facility or agency. Services of a doctor of optometry in furnishing prosthetic lenses.

Beginning in 1973, the beneficiary pays a \$60 deductible.

1977. Services in rural health clinics.

1980. Home health services. Deductible applicable to home health services is eliminated, effective July 1, 1981.

Facility costs of certain surgical procedures performed in freestanding ambulatory surgical centers.

Increase in annual limit for outpatient therapy from \$100 to \$500.

Recognizes comprehensive outpatient rehabilitation facilities as Medicare providers.

1981. Beginning in 1982, the beneficiary pays a \$75 deductible, with the carryover provision eliminated.

1984. Hepatitis B and pneumococcal vaccines and blood clotting factors and necessary supplies are included

as Part B benefits. Debridement of mycotic toenails is limited.

For outpatient physical therapy services, includes services of a podiatrist. For outpatient ambulatory surgery, includes services of a dentist and podiatrist furnished in his or her office.

1986. Includes vision care services furnished by an optometrist.

For occupational therapy services, includes services furnished in a skilled nursing facility (when Part A coverage has been exhausted), in a clinic, rehabilitation agency, public health agency, or by an independently practicing therapist.

Includes outpatient (in addition to previously covered inpatient) immunosuppressive drugs for 1 year after covered transplant.

Includes occupational therapy services provided in certain delivery settings.

For ambulatory surgical procedures performed in ambulatory surgical centers, hospital outpatient departments, and certain physician offices, the Part B coinsurance and deductible are no longer waived.

1987. Increases the maximum payment for mental health services and includes outpatient mental health services provided by ambulatory hospital-based or hospital-affiliated programs under the supervision of a physician.

Services provided by clinical social workers when furnished by risk-sharing health maintenance organizations and competitive medical plans, physician assistants in rural health manpower shortage areas, clinical psychologists in rural health clinics and community mental health centers, and certified nurse-midwives.

Coverage of outpatient immunosuppressive drugs (see 1986) is broadened and clarified to include prescription drugs used in immunosuppressive therapy.

Specifies in law that to be eligible for home health care, a Medicare beneficiary must have a restricted ability to leave the home, requiring the assistance of another or the aid of a supportive device (such as crutches, a cane, a wheelchair, or a walker).

1988. Beginning January 1, 1990, the beneficiary pays a \$75 deductible and 20 percent coinsurance, but once out-of-pocket expenses for the deductible and coinsurance exceed \$1,370, Medicare pays 100 percent of allowable charges for remainder of year.

Beginning in 1991, Medicare pays 50 percent of the cost of outpatient prescription drugs above \$600. When fully implemented in 1993, Medicare will pay

80 percent of prescription drug costs above a deductible that assumes that 16.8 percent of Part B enrollees will exceed the deductible.

Certain prescription drugs administered in an outpatient or home setting, including immunosuppressive drugs (previously covered for 1 year after a covered transplant), home intravenous drugs, and certain others, will be covered in 1990 under a new prescription drug provision.

1989. Provisions enacted in 1988 and to begin in 1990 and 1991 are repealed, and benefits are restored to levels in effect prior to January 1, 1989.

Limits on mental health benefits eliminated in 1990. Coverage extended to services of clinical psychologists and social workers.

The annual payment limits of \$500 per beneficiary for outpatient physical therapy services and outpatient occupational therapy services, each, are raised to \$750, for 1990 and later. (See 1980.)

1990. Beginning in 1991, routine mammography screenings are covered.

The Part B deductible is set at \$100 in 1991 and subsequent years.

Beginning in 1992, physicians' services are reimbursed on a fee-schedule basis.

1993. Includes coverage of oral, self-administered anticancer drugs.

Lengthens the coverage period for immunosuppressive drugs after a transplant to 18 months in 1995, 24 months in 1996, 30 months in 1997, and 36 months thereafter. (See 1986.)

The annual payment limits of \$750 per beneficiary for outpatient physical therapy services and outpatient occupational therapy services, each, are raised to \$900 for 1994 and later. (See 1989.)

1997. Home health services not associated with a hospital or skilled nursing facility stay for individuals enrolled in both HI and SMI are transferred from the HI program to the SMI program, effective January 1998. The HI program will continue to cover the first 100 visits following a hospital stay of at least 3 consecutive days or a skilled nursing facility stay. The cost to the SMI trust fund of the transferred services will phase in over a 6-year period, while the cost of the home health services will phase into the SMI premium over 7 years.

Coverage provided for a number of prevention initiatives, including (1) annual screening mammograms for female beneficiaries aged 40 or older, with SMI deductible waived; (2) screening pap smear and pelvic exam (including clinical breast exam) every

3 years or annually for beneficiaries at higher risk, with SMI deductible waived; (3) annual prostate cancer screening for male beneficiaries aged 50 or older, effective January 1, 2000; (4) colorectal screening procedures, including fecal-occult blood tests and flexible sigmoidoscopies, for beneficiaries aged 50 or older, colonoscopy for beneficiaries at high risk for colorectal cancer, and other procedures, including screening barium enemas under certain circumstances; (5) diabetes outpatient self-management training in nonhospital-based programs (previously covered in hospital-based programs only) and blood glucose monitors and testing strips for all diabetics (previously provided for insulin-dependent diabetics only), effective July 1, 1998; (6) procedures to identify bone mass, detect bone loss, or determine bone quality for certain qualified beneficiaries, at frequencies determined by the secretary of Health and Human Services, effective July 1, 1998.

Beginning January 1999, an annual beneficiary limit of \$1,500 will apply to all outpatient physical therapy services, except for services furnished by a hospital outpatient department. A separate \$1,500 limit will also apply to outpatient occupational therapy services, except for services furnished by hospital outpatient departments. Beginning with 2002, these caps will be increased by the percentage increase in the Medical Economic Index. (See 1993.)

1999. The coverage period for immunosuppressive drugs after a transplant is lengthened to 44 months, for individuals who exhaust their 36 months of coverage in 2000. For those exhausting their 36 months of coverage in 2001, at least 8 more months will be covered. (The secretary of Health and Human Services will specify the increase, if any, beyond 8 months.) For those exhausting their 36 months of coverage in 2002, 2003, or 2004, the number of additional months may be more or 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 therapy services and outpatient occupational therapy services, each, for services furnished by independent practitioners (that is, not by a hospital outpatient department) are suspended for 2000 and 2001. (See 1997.)

2000. Coverage for screening pap smears and pelvic exams (including a clinical breast exam) is provided every 2 years (increased from every 3 years) beginning July 1, 2001. (Annual coverage continues for beneficiaries at higher risk, and SMI deductible continues to be waived.) (See 1997.)

Annual coverage of glaucoma screenings is provided for certain high-risk beneficiaries, effective January 1, 2002.

Screening colonoscopies are covered for all beneficiaries, not just for those at high risk, beginning July 1, 2001. For persons not at high risk, a screening colonoscopy is covered 10 years after a previous one, or 4 years after a screening flexible sigmoidoscopy. (See 1997.)

Coverage is provided for medical nutrition therapy services under certain circumstances for beneficiaries who have diabetes or a renal disease, effective January 1, 2002.

The amount of a beneficiary's copayment for a procedure in a hospital outpatient department is limited, beginning April 1, 2001, to the hospital inpatient deductible applicable for that year. Also, the secretary of Health and Human Services must reduce the effective copayment rate for outpatient services to a maximum rate of 57 percent in 2001 (for services received after April 1); 55 percent in 2002 and 2003; 50 percent in 2004; 45 percent in 2005; and 40 percent in 2006 and later.

Time and budget limitations are removed on the coverage of immunosuppressive drugs, making coverage of these drugs a permanent benefit for beneficiaries who have received a covered organ transplant. (See 1999.)

The annual payment limits of \$1,500 per beneficiary for outpatient physical therapy services and outpatient occupational therapy services, each, for services provided by independent practitioners (that is, not by a hospital outpatient department), which were suspended for 2000 and 2001, are also suspended for 2002. (See 1999.)

The homebound criterion for home health services is clarified to specify that beneficiaries who require home health services may attend adult day care for therapeutic, psychosocial, or medical treatment and still remain eligible for the home health benefit. Homebound beneficiaries may also attend religious services without being disqualified from receiving home health benefits.

2003. The Part B deductible remains at \$100 through 2004 and increases to \$110 in 2005. Beginning in 2006, it will be increased each year by the annual percentage increase in the Part B aged actuarial rate.

A one-time, initial preventive physical exam is covered within 6 months of a beneficiary's first coverage under Part B, beginning January 1, 2005, for beneficiaries whose Part B coverage begins on or after that date.

Certain screening blood tests are covered for the early detection of cardiovascular disease and abnormalities associated with elevated risk for such disease, including certain tests for cholesterol and other lipid or triglyceride levels, effective January 1, 2005, under frequency standards to be established (but not to exceed once every 2 years).

Diabetes screening tests, including a fasting plasma glucose test and other such tests determined appropriate by the secretary of Health and Human Services, are covered for beneficiaries at risk for diabetes, beginning January 1, 2005, under frequency standards to be established (but not to exceed two times per year).

Under Parts A and B

1965. Requires that Medicare be secondary payer to benefits provided by liability insurance policies or under no-fault insurance.

1981. Requires that Medicare be secondary payer to employer-based group health plans for beneficiaries entitled to Medicare solely on the basis of end-stage renal disease (ESRD) for up to 12 months.

1982. For workers and their spouses aged 65 to 69, Medicare is the secondary payer when benefits are provided under an employer-based group health plan (applicable to employers with 20 or more employees who sponsor or contribute to the group plan).

Health maintenance organizations (HMOs) will be authorized as providers of benefits. The secretary of Health and Human Services must certify the prospective payment mechanism for HMOs before implementation.

1984. Medicare secondary-payer provisions are extended to spouses aged 65 to 69 of workers under 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 April 15, 1985, such services may be offered from October 1, 1985, through April 1, 1988.

For disabled individuals who are covered by employer-based health plans (with at least 100 employees), Medicare is the secondary payer, effective for the period from 1987 to 1991.

1987. Requires HMOs and competitive medical plans that cease to contract with Medicare to provide or arrange supplemental coverage of benefits related to preexisting conditions for the lesser of 6 months or the duration of an exclusion period.

Specifies in law that to be eligible for home health care, a Medicare beneficiary must have a restricted ability to leave the home, requiring the assistance of another or the aid of a supportive device (such as crutches, a cane, a wheelchair, or a walker).

Clarifies that the secondary-payer provision for disabled individuals covered under employer-based health plans for employers with at least 500 employees applies to employers who are government entities.

1990. Requires that Medicare be the secondary payer to employer-based group health plans for beneficiaries entitled to Medicare solely on the basis of ESRD for up to 18 months (extended from 12 months), effective February 1, 1991, to January 1, 1996.

The secondary-payer provision for disabled beneficiaries covered under large employer plans (see 1986) is effective through September 30, 1995.

1993. The secondary-payer provision for disabled beneficiaries covered under large employer plans is effective through September 30, 1998.

The secondary-payer provision for beneficiaries with ESRD applies to all beneficiaries with end-stage renal disease, not only those entitled to Medicare solely on the basis of it. The extension to include the first 18 months of an individual's entitlement on the basis of ESRD is effective through September 30, 1998.

1997. Established an expanded set of options for the delivery of health care under Medicare, referred to as Medicare+Choice (and also known as "Medicare Part C"). All Medicare beneficiaries can receive their Medicare benefits through the original fee-for-service program. In addition, most beneficiaries can choose instead to receive their Medicare benefits through one of the following Medicare+Choice plans:

(1) coordinated care plans (such as HMOs, provider-sponsored organizations, and preferred provider organizations), (2) Medical Savings Account (MSA)/High Deductible plans (through a demonstration available for up to 390,000 beneficiaries), or (3) private fee-for-service plans. Except for MSA plans, all Medicare+Choice plans are required to provide the current Medicare benefit package (excluding hospice services) and any additional health services required under the adjusted community rate (ACR) process. MSA plans provide Medicare benefits after a single high deductible is met, and enrollees receive

an annual deposit in their medical savings account. Transition rules for current Medicare HMO program also provided. (See also HMO provision of 1982.)

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

The provision making Medicare the secondary payer for the first 12 months of entitlement because of ESRD, which had been extended on a temporary basis (through September 30, 1998) to include the first 18 months of entitlement, has been extended, permanently, to include the first 30 months of entitlement on the basis of ESRD.

2003. Medicare+Choice is renamed Medicare Advantage. (It is still sometimes referred to as "Medicare Part C.") As before, beneficiaries having both plans, Medicare Part A and Part B, can receive their Medicare benefits through the original fee-for-service program; most can opt instead to use a Medicare Advantage plan in their area. Medicare Advantage plans include (1) Medicare Managed Care plans (like HMOs), (2) Medicare Preferred Provider Organization plans (PPOs), (3) Private Fee-for-Service plans, and (4) Medicare Specialty plans (available in some areas, to provide Medicare benefits for certain people with special needs, such as beneficiaries in institutions). Beginning in 2006, Medicare Advantage plan choices will be expanded to include regional PPOs. Participating regional PPOs will be required to serve an entire region (10 to 50 regions are to be established), and there are provisions to encourage plan participation. Regional PPOs must have a single deductible for benefits under Parts A and B, and they must include catastrophic limits for out-of-pocket expenditures. Beginning in 2006, the adjusted community rate (ACR) process for determining plan payments is replaced by a competitive bidding process. (Historical reference points to this item include the Medicare+Choice provision of 1997 and the HMO provision of 1982, both of which are displayed in this section.)

Under Part D

2003. Under temporary Medicare-endorsed prescription drug discount card program, for beneficiaries voluntarily enrolling and paying up to \$30 annually, discounts on certain prescription drugs, as specified by card sponsors. Under Transitional Assistance (TA) provision, beneficiaries whose incomes do not exceed 135 percent of the federal poverty level and do not have third-party prescription drug coverage are eligible for (1) financial assistance of up to \$600 per year for purchasing prescription drugs and (2) a subsidized enrollment fee under the temporary Medi-

care-endorsed prescription drug discount card program. Enrollment begins in May 2004, access to discounts begins in June 2004, and program phases out as drug benefit becomes available in 2006 (see next entry).

Beginning January 1, 2006, upon voluntary enrollment in either a stand-alone prescription drug plan (PDP) or an integrated Medicare Advantage (MA) plan that offers Part D coverage in its benefit, subsidized prescription drug coverage. Most FDA-approved drugs and biologicals are covered. (Drugs currently covered in Parts A and B remain covered there.) Standard Part D coverage is defined for 2006 as having a \$250 deductible, with 25 percent coinsurance (or other actuarially equivalent amounts) for drug costs above the deductible and below the initial coverage limit of \$2,250. Beneficiary is then responsible for all costs until the \$3,600 out-of-pocket limit is reached. For higher costs, there is catastrophic coverage; it requires enrollees to pay the greater of 5 percent coinsurance or a small copay (\$2 for generic or preferred multisource brand and \$5 for other drugs). After 2006, these benefit parameters are indexed to the growth in per capita Part D spending. In determining out-of-pocket costs, only those amounts actually paid by the enrollee or another individual (and not reimbursed through insurance) are counted; the exception is cost-sharing assistance from Medicare's low-income subsidies (certain beneficiaries with low incomes and modest assets will be eligible for certain subsidies that eliminate or reduce their Part D premiums and cost-sharing) and from State Pharmacy Assistance Programs. A beneficiary premium, representing 25.5 percent of the cost of basic coverage on average, is required (except for certain low-income beneficiaries, as previously mentioned, who may pay a reduced or no premium). For PDPs and the drug portion of MA plans, the premium will be determined by a bid process; each plan's premium will be 25.5 percent of the national weighted average plus or minus the difference between the plan's bid and the average. PDPs and MAs may set up formularies for their drug coverage, subject to certain statutory standards. To help them gain experience with the Medicare population, plans will be protected by a system of risk corridors, which allow Part D to assist plans with unexpected costs and to share in unexpected savings; after 2007, the risk corridors will become less protective. To encourage employer and union plans to continue prescription drug coverage to Medicare retirees, subsidies to these plans are authorized; the plan must meet or exceed the value of standard Part D coverage, and the subsidy pays 28 percent of the allowable costs associated with enrollee prescription drug costs between \$250 and \$5,000.

Medicare Financing

Hospital Insurance Taxes

See Table 2.A3.

Appropriations from General Revenues

1965. For HI costs attributable to transitionally insured beneficiaries.

For HI costs attributable to noncontributory wage credits granted for military service prior to 1957 (see Table 2.A2).

For the Part B program, an amount equal to participant premiums.

1972. For cost of Part B not met by enrollee premiums.

1982. For HI costs attributable to beneficiaries having transitional entitlement based on Medicare-qualified federal employment.

1983. For HI taxes on noncontributory wage credits granted for military service (a) from the inception of HI program through 1983 and (b) on a current basis, annually, beginning in 1984 (see Table 2.A2).

2002. Eliminated for HI taxes on noncontributory wage credits granted for military service on a current basis, for all years after calendar year 2001 (see Table 2.A2).

2003. For Part D costs not met by enrollee premiums or otherwise, beginning in January 2006. (That is, transfers from general revenues [plus smaller income sources, particularly the payments from states described below] will pay for (1) the 74.5 percent subsidy to PDPs and the prescription drug portion of MA plans [which remains after enrollee premiums of 25.5 percent, on average], in the form of a direct subsidy and reinsurance, and (2) for other Part D costs, such as low-income subsidies and subsidies to employers who provide qualifying drug coverage to their Medicare-eligible retirees.)

Participant Premiums

See Table 2.C1.

1965. Part B enrollee premium rate (originally \$3 per month) to be established annually such that it will pay one-half of program costs.

1972. Part B enrollee premium rate increase limited to rate of increase in OASDI cash benefits.

HI premium (originally \$33 per month) to be established annually. Only individuals not otherwise entitled to HI but desiring voluntary participation need to pay the HI premium.

1983. Part B enrollee premiums for July 1983 to December 31, 1983, frozen at premium level of June 30, 1983. Premiums for January 1, 1984, to December 31, 1985, set to cover 25 percent of aged program costs.

1984. Part B enrollee premiums for January 1, 1986, to December 31, 1987, will be set to cover 25 percent of aged program costs. Increases in the Part B premium may not exceed the dollar amount of the Social Security cost-of-living adjustment.

For calculating the amount of Part B premium surcharge for individuals from age 65 up to age 70 not previously enrolled in Part B, the number of years an individual did not enroll because of coverage by employer group health insurance will not be taken into account.

1985. Extends through calendar year 1988 the requirement that Part B premiums be set to cover 25 percent of aged program costs and that increases in the Part B premium may not exceed the dollar amount of the Social Security cost-of-living adjustment.

Premium-paying individuals who do not purchase Part A coverage within a specific time after becoming eligible because of age are subject to a 10 percent penalty for each 12 months they are late in enrolling. There is a cutoff on the length of time these individuals will have to pay an enrollment penalty. The 10 percent premium penalty would be limited to twice the number of years enrollment was delayed. Therefore, if enrollment were delayed 1 year, the penalty would be assessed for 2 years. Individuals in this category and already enrolled will have the length of time the higher premium was paid credited to them.

1987. Extends through calendar year 1989 the provisions requiring that the Part B premium be set to cover 25 percent of aged program costs, prohibiting any increase in the premium if there is no Social Security cost-of-living adjustment, and continuing to hold beneficiaries harmless from Social Security check reductions as a result of a premium increase.

1988. Increases in the Part B premium may not exceed the dollar amount of the Social Security cost-of-living adjustments for 1989 and beyond.

1989. Extends through calendar year 1990 the requirement that Part B premiums be set to cover 25 percent of aged program costs.

1990. The Part B premium is set at \$29.90 in 1991, \$31.80 in 1992, \$36.60 in 1993, \$41.10 in 1994, and \$46.10 in 1995.

1993. Part B enrollee premiums for January 1, 1996, to December 31, 1998, will be set to cover 25 percent of aged program costs.

1997. The Part B premium is permanently set at 25 percent of program costs.

2003. Beginning January 2007, the Part B premium is increased for beneficiaries meeting certain income thresholds. (Beneficiaries with modified adjusted gross incomes under \$80,000 will continue to pay premiums that are 25 percent of twice the actuarial rate. *Actuarial rate* is defined as one-half of the Part B expected monthly cost per enrollee. For beneficiaries with incomes between \$80,000 and \$100,000, the applicable percentage is 35 percent; for those with incomes between \$100,000 and \$150,000, the percentage is 50 percent; for incomes between \$150,000 and \$200,000, the percentage is 65 percent; and for incomes more than \$200,000, the percentage is 80 percent. For married couples, the income thresholds are doubled. These thresholds are to be updated each calendar year by the consumer price index (CPI). There is a 5-year adjustment period for this provision as well; that is, the amount of premium above 25 percent of twice the actuarial rate is phased in—at 20, 40, 60, 80, and 100 percent for 2007 to 2011 and later, respectively.)

For military retirees who enroll(ed) in Part B during the period from 2001 to 2004, the late enrollment penalty imposed on beneficiaries who do not enroll in Part B upon becoming eligible for Medicare is waived for premium payments for January 2004 and later. (Also, a special enrollment period for these military retirees is to begin as soon as possible and end December 31, 2004.)

For Part D, beginning in January 2006, a beneficiary premium, representing 25.5 percent of the cost of basic coverage on average, is required (except for certain low-income beneficiaries, who may pay a reduced or no premium). For PDPs and the drug portion of MA plans, the premium will be determined by a bid process; each plan's premium will be 25.5 percent of the national weighted average plus or minus the difference between the plan's bid and the average. A late enrollment penalty will apply for beneficiaries who fail to enroll at the first opportunity and who do not maintain creditable coverage (external prescription drug coverage, such as through a retiree group health plan that meets or exceeds the actuarial value of standard Part D coverage) elsewhere.

Income from Taxation of OASDI Benefits

1993. The additional income tax revenues resulting from the increase in the taxable percentage applicable to OASDI benefits (an increase from 50 percent to

85 percent, see Table 2.A31) are transferred to the HI trust fund.

Payment from States

2003. Beginning in January 2006, with the availability of drug coverage and low-income subsidies under Part D, Medicaid will no longer be primary payer for full-benefit dual eligibles, and states are required to make payments to defray a portion of the Part D drug expenditures for these beneficiaries. States pay 90 percent of the estimated costs for 2006, phasing down over a 10-year period to 75 percent for 2015 and later.

Interfund Borrowing

1981. See Table 2.A6.

1983. See Table 2.A6.

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Medicaid

The following are brief summaries of complex subjects. They should be used only as overviews and general guides to the Medicare and Medicaid programs. The views expressed herein do not necessarily reflect the policies or legal positions of the Centers for Medicare & Medicaid Services (CMS) or the Department of Health and Human Services (DHHS). 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.¹

Overview

Title XIX of the Social Security Act is a federal and state entitlement program that pays for medical assistance for certain individuals and families with low incomes and resources. This program, known as Medicaid, became law in 1965 as a cooperative venture jointly funded by the federal and state governments (including the District of Columbia and the Territories) to assist states in furnishing medical assistance to eligible needy persons. Medicaid is the largest source of funding for medical and health-related services for America's poorest people.

Within broad national guidelines established by federal statutes, regulations, and policies, each state (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, services, and reimbursement during the year.

1. These summaries were prepared by Earl Dirk Hoffman Jr., Barbara S. Klees, and Catherine A. Curtis, Office of the Actuary, Centers for Medicare & Medicaid Services, 7500 Security Blvd., Baltimore, MD 21244. The authors wish to express their gratitude to Mary Onnis Waid, who originated these summaries and diligently prepared them for many years before her retirement.

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 persons 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 Medicaid coverage for certain individuals who receive federally assisted income-maintenance payments, as well as for related groups not receiving cash payments. In addition to their Medicaid programs, most states have additional "state-only" programs to provide medical assistance for specified poor persons who do not qualify for Medicaid. Federal funds are not provided for state-only programs. The following enumerates the mandatory Medicaid "categorically needy" eligibility groups for which federal matching funds are provided:

- 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;
- 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 predate 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 because of 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; and
- 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 criteria more liberal than the AFDC income and resources requirements that were in effect in their state on July 16, 1996;
- Institutionalized individuals eligible under a “special income level” (the amount is set by each state—up to 300 percent of the SSI federal benefit rate);
- Individuals who would be eligible if institutionalized, but who are receiving care under home and community-based services (HCBS) waivers;
- Certain aged, blind, or disabled adults who have incomes above those requiring mandatory coverage but below the FPL;
- Recipients of state supplementary income payments;
- Certain working-and-disabled persons with family income less than 250 percent of the FPL who would qualify for SSI if they did not work;
- Tuberculosis-infected persons who would be financially eligible for Medicaid at the SSI income level if they were within a Medicaid-covered category (however, coverage is limited to tuberculosis-related ambulatory services and tuberculosis drugs);
- Certain uninsured or low-income women who are screened for breast or cervical cancer through a program administered by the Centers for Disease Control and Prevention. 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); and
- 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 or

resources or both 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, 35 states plus the District of Columbia have elected to have a MN program and are providing at least some MN services to at least some MN beneficiaries. All remaining states utilize the “special income level” option to extend Medicaid to the near poor in medical institutional settings.

The Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (Public Law 104-193)—known as the welfare reform bill—made restrictive changes regarding eligibility for SSI coverage that had an impact on the Medicaid program. For example, legal resident aliens and other qualified aliens who entered the United States on or after August 22, 1996, are ineligible for Medicaid for 5 years. States have the option of providing Medicaid coverage for most aliens entering before that date and coverage for those eligible after the 5-year ban; emergency services, however, are mandatory for both of these alien coverage groups. For aliens who lose SSI benefits because of the new restrictions regarding SSI coverage, Medicaid coverage for them can continue only if these persons can be covered under some other eligibility status (again with the exception of emergency services, which are mandatory). Public Law 104-193 also affected a number of disabled children, who lost SSI as a result of the restrictive changes; however, their eligibility for Medicaid was reinstated by Public Law 105-33, the BBA.

In addition, welfare reform repealed the open-ended federal entitlement program known as Aid to Families with Dependent Children (AFDC) and replaced it with Temporary Assistance for Needy Families (TANF), which provides states with grants to be spent on time-limited cash assistance. TANF generally limits a family’s lifetime cash welfare benefits to a maximum of 5 years and permits states to impose a wide range of other requirements as well—in particular, those related to employment. However, the impact on Medicaid eligibility is not expected to

be significant. Under welfare reform, persons who would have been eligible for AFDC 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 on the basis of 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 had he or she applied during that time. Medicaid coverage generally stops at the end of the month in which a person no longer meets the criteria of any Medicaid eligibility group. The BBA allows states to provide 12 months of continuous Medicaid coverage (without reevaluation) for eligible children under the age of 19.

The Ticket to Work and Work Incentives Improvement Act of 1999 (Public Law 106-170) provides or continues Medicaid coverage to certain disabled beneficiaries who work despite their disability. Beneficiaries with higher incomes may pay a sliding-scale premium based on income.

Scope of Medicaid Services

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

- Inpatient hospital services;
- Outpatient hospital services;
- 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; and
- 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, and
- 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 and older who require a nursing facility level of care. The PACE team offers and manages all health, medical, and social services and mobilizes other services as needed to provide 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 on the basis of medical diagnosis or condition.

In general, states are required to provide comparable amounts, duration, and scope of services to all categorically needy and categorically related eligible persons. There are two important exceptions: (1) medically necessary health care services that are identified under the EPSDT program for eligible children, and that are within the scope of mandatory or optional services under federal law, must be covered even if those services are not included as part of the covered services in that state's plan, and (2) states may request waivers to pay for otherwise uncovered home and community-based services (HCBS) for Medicaid-eligible persons who might otherwise be institutionalized. As long as the services are cost effective, states have few limitations on the services that may be covered under these waivers (except that, other than as a part of respite care, states may not provide room and board for the beneficiaries). With certain exceptions, a state's Medicaid program must allow beneficiaries to have some informed choices among 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 to other low-

income or uninsured persons under what is known as the "disproportionate share hospital" (DSH) adjustment. From 1988 to 1991, excessive and inappropriate use of the DSH adjustment resulted in rapidly increasing federal expenditures for Medicaid. 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 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 fiscal year 2004, the FMAPs varied from 50 percent in 12 states to 77 percent in Mississippi and averaged 60.2 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 fiscal years 2001 to 2005. The Jobs and Growth Tax Relief Reconciliation Act of 2003 (Public Law 108-27), to bring about state fiscal relief in the current troubled economy, has made three temporary modifications to the states' FMAP calculation: (1) the FMAP for the last two quarters of 2003 will equal the greater of the current law FMAPs for 2002 or 2003; (2) the FMAP for the first three quarters of 2004 will equal the greater of the current law FMAPs for 2003 or 2004; and (3) for the last two quarters of 2003 and first three quarters of 2004, the newly calculated (under 1 and 2 above) FMAP will increase by 2.95 percentage points. 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 with the general Medicaid average of 60.2 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 12 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 economic recessions;
- The expanded coverage and utilization of services;
- The DSH payment program, coupled with its inappropriate use to increase federal payments to states;

- The increase in the number of very old and disabled persons requiring extensive acute and long-term health care and various related services;
- The results of technological advances to keep a greater number of very low-birth-weight babies and other critically ill or severely injured persons alive and in need of continued extensive and very costly care;
- The increase in drug costs and the availability of new expensive drugs; and
- The increase in payment rates to providers of health care services, when compared with general inflation.

As with all health insurance programs, most Medicaid beneficiaries incur relatively small average expenditures per person each year, and a relatively small proportion incurs very large costs. Moreover, the average cost varies substantially by type of beneficiary. National data for 2001, for example, indicate that Medicaid payments for services for 23.3 million children, who constitute 50 percent of all Medicaid beneficiaries, average about \$1,305 per child (a relatively small average expenditure per person). Similarly, for 11.6 million adults, who comprise 25 percent of beneficiaries, payments average about \$1,725 per person. However, certain other specific groups have much larger per-person expenditures. Medicaid payments for services for 4.4 million aged, constituting 9 percent of all Medicaid beneficiaries, average about \$10,965 per person; for 7.7 million disabled, who make up 16 percent of beneficiaries, payments average about \$10,455 per person. When expenditures for these high- and lower-cost beneficiaries are combined, the 2001 payments to health care vendors for 47.0 million Medicaid beneficiaries average \$3,965 per person.

Long-term care is an important provision of Medicaid that will be increasingly utilized as our nation's population ages. The Medicaid program paid for over 41 percent of the total cost of care for persons using nursing facility or home health services in 2001. National data for 2001 show that Medicaid payments for nursing facility services (excluding ICFs/MR) totaled \$37.2 billion for more than 1.7 million beneficiaries—an average expenditure of \$21,890 per nursing home beneficiary. The national data also show that Medicaid payments for home health services totaled \$3.5 billion for more than 1.0 million beneficiaries—an average expenditure of \$3,475 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 implementation of their Medicaid managed care programs. Waiver authority under sections 1915(b) and 1115 of the Social Security Act is an important part of the Medicaid program. Section 1915(b) waivers allow states to develop innovative health care delivery or reimbursement systems. Section 1115 waivers allow state-wide health care reform experimental demonstrations to cover uninsured populations and to test new delivery systems without increasing costs. Finally, the BBA provided states with a new option to use managed care. The number of Medicaid beneficiaries enrolled in some form of managed care program is growing rapidly, from 14 percent of enrollees in 1993 to 59 percent in 2003.

More than 46.0 million persons received health care services through the Medicaid program in fiscal year 2001 (the last year for which beneficiary data are available). In fiscal year 2003, total outlays for the Medicaid program (federal and state) were \$278.3 billion, including direct payment to providers of \$197.3 billion, payments for various premiums (for HMOs, Medicare, etc.) of \$52.1 billion, payments to disproportionate share hospitals of \$12.9 billion, and administrative costs of \$16.0 billion. Outlays under the SCHIP program in fiscal year 2003 were \$6.1 billion. With no changes to either program, expenditures under Medicaid and SCHIP are projected to reach \$445 billion and \$7.5 billion, respectively, by fiscal year 2009.

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 Medi-

care 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, or Part A) and Supplementary Medical Insurance (SMI, or Part B) premiums and the Medicare coinsurance and deductibles, subject to limits that states may impose on payment rates. SLMBs are Medicare beneficiaries with resources like the QMBs but with incomes that are higher, though still less than 120 percent of the FPL. For SLMBs, the Medicaid program pays only the Part B premiums. A third category of Medicare beneficiaries who may receive help consists of disabled and working individuals. According to the Medicare law, disabled and working individuals who previously qualified for Medicare because of disability, but who lost entitlement because of their return to work (despite the disability), are allowed to purchase Medicare Part A and Part B. If these persons have incomes below 200 percent of the FPL but do not meet any other Medicaid assistance category, they may qualify to have Medicaid pay their Part A premiums as Qualified Disabled and Working Individuals (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 Part B 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.

The Centers for Medicare & Medicaid Services (CMS) estimates that Medicaid currently provides some level of supplemental health coverage for about 6.5 million Medicare beneficiaries.

Starting January 2006, the new Medicare prescription drug benefit will provide drug coverage for Medicare beneficiaries, including those who also receive coverage from Medicaid. In addition, individuals eligible for Medicare and Medicaid will also receive the low-income subsidy for the Medicare drug plan premium and assistance with cost sharing for prescriptions. Medicaid will no longer provide drug benefits for Medicare beneficiaries.

Since the Medicare drug benefit and low-income subsidy will replace a portion of state Medicaid expenditures for drugs, states would see a reduction in Medicaid expenditures. To offset this reduction, the Medicare Prescription Drug, Improvement, and Modernization Act of

2003 (Public Law 108-173) requires each state to make a monthly payment to Medicare representing a percentage of the projected reduction. For 2006, this payment is 90 percent of the projected 2006 reduction in state spending. After 2006, the percentage decreases by $1 \frac{2}{3}$ percent per year to 75 percent for 2014 and later.

Note: Medicaid data are based on the projections of the Mid-Session Review of the President's Fiscal Year 2005 Budget and are consistent with data received from the states on Forms CMS-2082, MSIS, CMS-37, and CMS-64.

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Unemployment Insurance

Through federal and state cooperation, unemployment insurance programs are designed to provide benefits to regularly employed members of the labor force who become involuntarily unemployed and who are able and willing to accept suitable employment. Workers in all 50 states, the District of Columbia, Puerto Rico, and the Virgin Islands are covered under unemployment insurance programs.

To induce states to enact unemployment insurance laws, the Social Security Act of 1935 provided a tax offset incentive. A uniform national tax was imposed on payrolls of industrial and commercial employers who employed eight or more workers in 20 or more weeks in a calendar year. Employers who paid taxes to a state with an approved unemployment insurance law could credit (offset) up to 90 percent of the state tax against the federal tax. This 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 ensure that a state participating in the program has an unemployment insurance system that is fairly administered and financially secure.

One requirement is that all contributions collected under state laws be deposited in the unemployment trust fund of the U.S. Treasury Department. The fund is invested as a whole, but each state has a separate account to which its deposits and its share of interest on investments are credited. At any time, a state may withdraw money from its account in the trust fund, but only to pay benefits. Thus, unlike the situation in the majority of states having workers' compensation and temporary disability insurance laws, unemployment insurance benefits are paid exclusively through a public fund. Private plans cannot be substituted for the state plan.

Aside from federal standards, each state has major responsibility for the content and development of its unemployment insurance law. The state itself decides the amount and duration of benefits (except for certain federal requirements concerning federal-state Extended Benefits), the contribution rates (with limitations), and, in general, the eligibility requirements and disqualification provisions. The states also directly administer the programs collecting contributions, maintaining wage records (where applicable), taking claims, determining eligibility, and paying benefits to unemployed workers.

Coverage

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

Private employers in industry and commerce are subject to the law if they have one or more individuals employed on 1 day in each of 20 weeks during the current or preceding year, or if they paid wages of \$1,500 or more during any calendar quarter in the current or preceding year.

Agricultural workers are covered on farms with a quarterly payroll of at least \$20,000 or employing 10 or more employees in 20 weeks of the year. Domestic employees in private households are subject to FUTA if their employer pays wages of \$1,000 or more in a calendar quarter. Excluded from coverage are workers employed by their families and the self-employed.

Before 1976, employment in state and local governments and nonprofit organizations were exempt from FUTA. However, as a result of federal legislation enacted in 1976, most employment in these groups must now be covered by state law as a condition for securing federal approval of the state law. Under this form of coverage, local government and nonprofit employers have the option of making contributions as under FUTA or of reimbursing the state for benefit expenditures actually made. Elected officials, legislators, members of the judiciary, and the state National Guard are still excluded, as are employees of nonprofit organizations that employ fewer than four workers in 20 weeks in the current or preceding calendar year. Many states have extended coverage beyond that provided by federal legislation.

Through special federal legislation, federal civilian employees and ex-servicemembers of the armed forces were brought under the unemployment insurance system. Benefits for those persons are financed through federal funds but are administered by the states and paid in accordance with the provisions of the state laws. A separate unemployment insurance law enacted by Congress covers railroad workers.

Amendments to FUTA made in 2000 added Indian tribes to the set of entities for whom coverage is required, although they are not liable for FUTA taxes. As a result, workers performing services for tribes are now potentially eligible to receive unemployment insurance benefits. Coverage is required when service is performed for any Indian tribe, band, nation, or other organized group community that is recognized as eligible for federal assistance because of their status as Indians. The same permissible exclusion from coverage that is applicable to other governmental entities also applies to services performed for Indian tribes. If an Indian tribe fails to make payments to states as required, the tribe loses its FUTA exemption and may lose coverage.

Eligibility for Benefits

Unemployment benefits are available as a matter of right (without a means test) to unemployed workers who have demonstrated their attachment to the labor force by a specified amount of recent work or earnings in covered employment. All workers whose employers contribute to or make payments in lieu of contributions to state unemployment funds, federal civilian employees, and ex-servicemembers are eligible if they are involuntarily unemployed, able to work, available for work, and actively seeking work. Workers must also meet the eligibility and qualifying requirements of the state law and be free from disqualifications. Workers who meet these eligibility conditions may still be denied benefits if they are found to have voluntarily quit their jobs without good cause or were discharged for misconduct.

Work Requirements

A worker's monetary benefit rights are based on his or her employment in covered work over a prior reference period called the "base period," and these benefit rights remain fixed for a "benefit year." In most states, the base period is the first 4 quarters of the last 5 completed calendar quarters preceding the claim for unemployment benefits.

Benefits

Under all state laws, the weekly benefit amount—that is, the amount payable for a week of total unemployment—

varies with the worker's past wages within certain minimum and maximum limits. In most states, the formula is designed to compensate for a fraction of the usual weekly wage, normally about 50 percent, subject to specified dollar maximums.

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 34 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 age 16, 18, or 19 (and, generally, older if incapacitated); eight states include a nonworking spouse; and two 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 13 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 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 maximum of 13 weeks of Extended Benefits. There is, however, an overall maximum of 39 weeks of regular and Extended Benefits. Extended Benefits are payable at the same rate as the weekly amount under the regular state program.

Before the 1992 legislation, the Extended Benefits program was based on the insured unemployment rate (IUR)—the number of unemployed workers receiving benefits in a state as a percentage of the number of persons in employment that is covered by unemployment insurance in that state. By definition, the IUR does not include workers who have exhausted their benefits but are still unemployed.

The 1992 legislation (P.L. 102-318) provided states with the option of adopting an additional formula for triggering the permanent Extended Benefits program. Effective March 1993, states had the option of amending their laws to use alternative total unemployment rate triggers in addition to the current insured unemployment rate triggers. Under this option, Extended Benefits would be paid when (1) the state's seasonally adjusted total unemployment rate for the most recent 3 months is at least 6.5 percent, and (2) that rate is at least 110 percent of the state average total unemployment rate in the corresponding 3-month period in either of the 2 preceding years.

States triggering on to the Extended Benefits program under other triggers would provide the regular 26 weeks of unemployment benefits in addition to 13 weeks of Extended Benefits (which is the same number of weeks of benefits provided previously). In addition, states that have chosen the total unemployment rate option will also amend their state laws to add an additional 7 weeks of Extended Benefits (for a total of 20 weeks) 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 October 17, 2004, Extended Benefits were not payable in any state.

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Workers' Compensation

Workers' compensation was the first form of social insurance to develop widely in the United States. It is designed to provide cash benefits and medical care when employees suffer work-related injuries or illnesses, and survivor benefits to the dependents of workers whose deaths result from a work-related incident. In exchange for receiving benefits, workers who receive workers' compensation are generally not allowed to bring a tort suit against their employers for damages of any kind.

The federal government was the first to establish a workers' compensation program, covering its civilian employees with an act that was passed in 1908 to provide benefits for workers engaged in hazardous work. The remaining federal workforce was covered in 1916. Nine states enacted workers' compensation laws in 1911. By 1920, all but 7 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 subcontractors of the 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 U.S. Department of Energy to deal with other claims of work-related occupational disease.

Coverage

In 2002, state and federal workers' compensation laws covered about 125.6 million employees. Covered payroll in 2002—that is, total wages paid to covered workers—was \$4.62 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. These workers have health insurance and short-term and long-term cash benefit plans that cover disabilities whether or not the conditions are work-related. In addition, under federal laws these workers retain the right to bring tort suits against their employers for negligence in the case of work-related injuries or illness.

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

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, the employee is unable to work at all while he or she is recovering from the injury but the worker is 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 is generally set at some percentage of the state's average weekly wage, ranging from 66 2/3 percent to 200 percent, but typically 100 percent.

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. In only a very few cases is the worker found to have a permanent total disability.

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 and is 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.

Program Highlights

Benefit payments under workers' compensation programs increased to \$53.4 billion in 2002, which was a 7.4 percent increase from the benefit figure of \$49.8 billion in 2001. When compared with covered wages, benefits grew by 6.9 percent from \$1.08 to \$1.16 per \$100 of covered wages.

In 2002, medical benefits accounted for \$24.3 billion, and wage loss compensation accounted for \$29.2 billion. The latter amount includes payments to disabled workers and the survivors of deceased workers.

The \$53.4 billion for workers' compensation benefit payments in 2002 includes more than \$827 million in benefits for the Black Lung program. This program is described separately (see Tables 9.D1–9.D3).

The employers' cost of providing workers' compensation coverage generally varies according to risk, industrial classification, and experience rating. Nationally, in 2002, such costs were approximately \$1.58 per \$100 of cov-

ered wages, or about \$580 for each of the 125.6 million protected employees.

The year 2002 is the second year since 1992 that benefits grew faster than wages. It is also the second year since 1993 that employer costs increased 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 with the federal-state system of unemployment insurance. However, the Federal Unemployment Tax Act (FUTA) was amended in 1946 to permit states where employees made contributions under the unemployment insurance program to use some or all of these contributions for the payment of disability benefits (but not for administration). Three of the nine states that could have benefited by this provision for initial funding for TDI took advantage of it: California, New Jersey, and Rhode Island. The first state law was enacted by Rhode Island in 1942, followed by legislation in California and the railroad industry in 1946, New Jersey in 1948, and New York in 1949. Then came a hiatus of two decades before Puerto Rico and Hawaii passed laws in 1968 and 1969, respectively.

The 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 reaching an agreement with employees or a union establishing a labor-management benefit plan, or by purchasing group insurance from a commercial carrier. In New York, the employer may also provide protection through the State Insurance Fund, which is a state-operated competitive carrier. Both Hawaii and New York operate special funds to pay benefits to workers who become disabled while unemployed or whose employers have failed to provide the required protection. In other jurisdictions, benefit payments for the disabled unemployed are made from the regular state-operated funds.

Eligibility for Benefits

To qualify for benefits, a worker must fulfill certain requirements regarding past earnings or employment and must be disabled as defined in the law. In addition, claimants may be disqualified if they received certain types of income during the period of disability.

Earnings or Employment Requirements

A claimant must have a specified amount of past employment or earnings to qualify for benefits. However, in most jurisdictions with private plans, the plans either insure workers immediately upon their employment or, in some cases, require a short probationary period of employment, usually from 1 to 3 months. Upon cessation of employment after a specified period, workers generally lose their private plan coverage and must look to a state-created fund for such protection.

Disability Requirements

The laws generally define disability as inability to perform regular or customary work because of a physical or mental condition. Stricter requirements are imposed for dis-

ability during unemployment in New Jersey and New York. All the laws pay full benefits for disability due to pregnancy.

Disqualifying Income

All the laws restrict payment of disability benefits when the claimant is also receiving workers' compensation payments. However, the statutes usually contain some exceptions to this rule (for example, if the workers' compensation is for partial disability or for previously incurred work disabilities).

The laws differ with respect to the treatment of sick leave payments. Rhode Island pays disability benefits in full even though the claimant draws wage continuation payments. New York deducts from the benefits any payment from the employer or from a fund contributed to by the employer, except for benefits paid pursuant to a collective bargaining agreement. In California, New Jersey, and Puerto Rico, benefits plus paid sick leave for any week during disability may not exceed the individual's weekly earnings before their disablement. Railroad workers are not eligible for TDI benefits while they receive sick leave pay.

In all seven TDI systems, as with unemployment insurance, weekly benefit amounts are related to a claimant's previous earnings in covered employment. In general, the benefit amount for a week is intended to replace at least one-half the weekly wage loss for a limited time. All the laws, however, specify minimum and maximum amounts payable for a week. The maximum duration of benefits varies from 26 weeks to 52 weeks. 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 predisability "base period" wages reduce benefit duration. A noncompensable waiting period of a week or 7 consecutive days of disability (4 days for railroad workers) is generally required before the payment of benefits for subsequent weeks.

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

Financing and Administration

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

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.

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

The basic Black Lung benefit rate is set by law at 37 1/2 percent of the monthly pay rate for federal employees in the first step of grade GS-2. The basic rate

to a miner or widow may be increased according to the number of qualified dependents—50 percent of the basic benefit rate if one dependent qualifies, 75 percent for two dependents, and 100 percent for three or more dependents.

Since Black Lung payments are tied directly to federal employee salary scales, increases are automatically payable when federal salaries are increased. Reflecting a 2.7 percent adjustment, monthly benefit rates effective January 1, 2004, are:

- Miner or widow, \$549.00
- Miner or widow and 1 dependent, \$823.50
- Miner or widow and 2 dependents, \$960.80
- Miner or widow and 3 or more dependents (family benefit), \$1,098.00

If a miner or surviving spouse is receiving workers' compensation, unemployment compensation, or disability insurance payments under state law, the Black Lung benefit is offset by the amount being paid under these other programs.

The 1972 amendments extended benefit payments to full orphans, parents, brothers, and sisters of deceased miners. Under earlier law, survivor payments were limited to widows and their dependent children (if the miner and spouse were both deceased, no benefits were payable to surviving children). The 1972 amendments also expanded coverage to include surface as well as underground coal miners.

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Veterans' Benefits

A variety of programs and benefits are available to servicemembers and veterans of military service: disability payments, educational assistance, health care, vocational rehabilitation, survivor and dependents benefits, life insurance, burial benefits, special loan programs, and hiring preference for certain jobs. Most of the veterans programs are administered by the Department of Veterans Affairs (VA).

Monetary Benefits

Two major cash benefit programs are available for veterans. The first program provides benefits to veterans with service-connected disabilities and, on the veteran's death, benefits are available for eligible surviving spouses, children, and dependent parents. These benefits are payable regardless of other income or resources. The second program provides benefits to needy veterans who have non-service-connected disabilities. These benefits are means tested.

Compensation for Service-connected Disabilities

Disability compensation is a monetary benefit paid to veterans who are disabled by injury or disease incurred in or aggravated during active military service. Individuals discharged or separated from military service under dishonorable conditions are generally not eligible for compensation payments. The amount of monthly compensation depends on the degree of disability, rated as the percentage of normal function lost. Payments in 2003 range from \$104 a month for a 10 percent disability to \$2,193 a month for total disability. Veterans who have at least a 30 percent service-connected disability are entitled to an additional dependent's allowance. The amount is based on the number of dependents and degree of disability.

Pensions for Non-service-connected Disabilities

Monthly benefits are provided to wartime veterans with limited income and resources who are totally and permanently disabled because of a condition not attributable to their military service. To qualify for these pensions, a veteran must have served in one or more of the following designated war periods: The Mexican Border Period, World War I, World War II, the Korean Conflict, the Vietnam Era, or the Gulf War. The period of service must have lasted at least 90 days, and the discharge or separation cannot have been dishonorable. Service less than 90 days is acceptable if the veteran was discharged with a service-connected disability.

Pension payments are reduced by countable income. Some medical and other expenses are allowed as deductions from countable income. Veterans aged 65 years or older who meet service, net worth, and income requirements are eligible for a pension, regardless of current physical condition.

Effective December 1, 2002, maximum benefit amounts for non-service-connected disabilities range from \$807 per month for a veteran without a dependent spouse or child to \$1,597 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.

DIC payments may also be authorized for survivors of veterans who were totally disabled by service-connected conditions at the time of death, even though their service-connected disabilities did not cause their deaths.

Eligibility for survivor benefits based on a non-service-connected death of a veteran with a service-connected disability requires a marriage of at least a 1-year duration before the veteran's death. A surviving spouse is generally required to have lived continuously with the veteran from marriage until his or her death. Entitlement for death benefits ends with the surviving spouse's remarriage, but may be restored upon termination of the remarriage.

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 2003, for pay grades E-1 through E-6, a flat monthly rate of \$948 is paid to surviving spouses. Monthly benefits for grades E-7 through E-9 range between \$980 and \$1,165. For veterans who died after January 1, 1993, surviving spouses receive a flat \$948 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 on the basis of need to surviving spouses and dependent children (under age 18, disabled, or students) of deceased veterans of the wartime periods specified in the disability pension program. For a pension to be payable, the veteran generally must have met the same service requirements established for the non-service-connected disability pension program, and the surviving spouse must meet the same marriage requirements as under the dependency and indemnity compensation program.

The pension amount depends on the composition of the surviving family and the physical condition of the surviving spouse. In 2002, pensions range from \$541 a month for a surviving spouse without dependent children to \$1,032 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 \$137 a month for each additional dependent child. Pension payments are reduced by countable income. Some medical and other expenses are allowed as deductions from countable income.

Hospitalization and Other Medical Care

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

Enrollment and Provision of Hospitalization and Outpatient Medical Care to Veterans

To receive health care, veterans generally must be enrolled with the VA and may apply for enrollment at any time. Veterans do not have to be enrolled if they (1) have a service-connected disability of 50 percent or more, (2) want care for a disability that the military determined was incurred or aggravated in the line of duty but that the VA has not yet rated during the 12-month period following discharge, or (3) want care for a service-connected disability.

Enrolled veterans and those not subject to enrollment are eligible to receive comprehensive medical benefits, which include basic and preventive care.

Eligibility Requirements

Basic eligibility for hospital care and outpatient medical services are based on a veteran's character of discharge

from active military service. Veterans discharged prior to September 7, 1980, for other than dishonorable conditions have basic eligibility for care. However, veterans discharged after September 7, 1980, must have completed 24 consecutive months of active-duty service. Reservists who were called or ordered to active duty may also be eligible for care as a veteran if they complete the full period for which they were called or ordered to active duty. The 24-month minimum service time requirement does apply to veterans who were discharged for reasons of early-out under Title 38, U.S.C. 1173, discharged for a disability incurred or aggravated in the line of duty, was awarded VA compensation, or is in need of care for an adjudicated service-connected disability.

Care for Dependents and Survivors

The dependents and survivors of certain veterans may be eligible for medical care under the Civilian Health and Medical Program of the Department of Veterans Affairs (CHAMPVA) if not eligible for medical care under Tricare or Medicare. Tricare (formerly known as CHAMPUS) is the health program administered by the Department of Defense for dependents of active-duty personnel and military retirees and their dependents.

Beneficiaries covered by CHAMPVA may be treated at Department facilities when space is available. Usually, however, the person with CHAMPVA coverage is treated at a community hospital of his or her choice. The Department of Veterans Affairs pays for a part of the bill, and the beneficiary is responsible for any required copayment.

Nursing Home Care

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

- Provide nursing home care to any veteran in need of such care for a service-connected disability;
- Provide nursing home care to any veteran who is in need of such care and who has a service-connected disability rated at 70 percent or greater;
- Provide nursing home care, either directly or through contracts when clinically indicated for eligible veterans;
- Facilities will determine the need for nursing home care based on a comprehensive interdisciplinary assessment.

Other Medical Benefits

Other Department of Veterans Affairs programs and medical benefits are available to certain veterans. Veterans do not need to be enrolled in the VA health care system to be eligible for any of the following benefits, although there may be restrictions: domiciliary care, alcohol and drug dependency treatment; prosthetic appliances; modification in certain veterans' homes when so ordered by his or her physician, subject to cost limitations; compensation and pension examinations; care as part of a VA-approved research project; readjustment counseling and treatment for Vietnam veterans; sexual trauma counseling for veterans suffering from trauma of a sexual nature during active military service; counseling; vocational rehabilitation counseling; special registry examinations and dental care.

Educational Assistance

The post-Vietnam Veterans' Educational Assistance Program (VEAP) is a voluntary contributory matching

program for persons entering service after December 31, 1976. To be eligible, the servicemember must have initially contributed to VEAP before April 1, 1987. The Montgomery GI Bill—Active Duty program provides education benefits for individuals entering military service on or after July 1, 1985, and for certain other individuals. Servicemembers entering active duty have their basic pay reduced \$100 a month for the first 12 months of their service unless they specifically elect not to participate. An educational assistance program is also available for individuals who enter the Selected Reserve on or after July 1, 1985.

The Department of Veterans Affairs also pays educational assistance for dependents if a veteran is permanently and totally disabled from a service-related cause, or dies as a result of service, or while completely disabled from service-related causes.

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Temporary Assistance for Needy Families

On August 22, 1996, the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 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 with \$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.

Program Features

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 fiscal year 2002. Minimum participation rates for two-parent families started at 75 percent in fiscal year 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 fiscal year 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 cir-

cumstances. 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 toward 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 fiscal year 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 (nonfederal) 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 funds from the Contingency Fund. The Contingency Fund has a more rigorous MOE requirement.

The fiscal year 2004 budget follows the framework proposed in the president's fiscal year 2003 budget request that includes reauthorization of the Personal Responsibility and Work Opportunity Reconciliation Act. The reauthorization maintains current program funding levels for the following activities: Family Assistance Grants to States, Tribes and Territories; Matching Grants to Territories; and Tribal Work Programs. Authority for both the Contingency Fund and Supplemental Grants for Population Increases would be reinstated. In addition, a new TANF Research, Demonstration, and Technical Assistance program that will include promotion of family formation and healthy two-parent marriage activities would be established, as well as a new matching grant program focused on marriage promotion. Finally, the Bonus to Reward High Performance States would be refocused to provide for bonuses on employment achievement. The president's appropriation request for this account assumes passage of pending legislation included in the president's fiscal year 2004 request.

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 underspending. 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 6 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

The Department of Health and Human Services (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.

Effective Dates

States had until July 1, 1997, to submit state plans and begin implementing TANF, although they had the option to implement earlier. For states to remain eligible (that is, continue to qualify to receive funding under TANF), they will need to submit TANF renewal plans during the applicable 27-month period described in section 402 of the Social Security Act. Thus, state plans remain effective for about 3 years. States may choose to submit TANF renewal plans before their funding period expires; however, this will move up the time for the next renewal of the state's eligibility status. Only eligible states may receive a TANF block grant.

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, the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 replaced the former tribal JOBS program with the Native Employment Works (NEW) program. The NEW program provides funding for tribes and intertribal 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

Overview

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 2004, an eligible four-person household in the continental United States with no income receives \$499 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 at least 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 and are not subject to the income or asset limits.

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

1. Twenty percent of earned income;
2. Standard deduction of \$153 for fiscal year 2005 for five-person households and \$175 for larger households;
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; and
6. Excess shelter expenses, which are total shelter costs including utilities minus 50 percent of income after all the above deductions have been subtracted (effective October 1, 2004, the limit was \$388; 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 21.3 million persons per month participated in the Food Stamp program during fiscal year 2003 (October 2002 through September 2003). The average monthly value of food stamps per person was \$83.93, and the total value of benefits issued that year was \$21.4 billion. Total federal government costs for this program were \$23.9 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 semiannual 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 semiannual, 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 and 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 nondisabled 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, child care, 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 percentages 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. The following 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 of 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 to \$300 on October 1, 2000.
- The earnings of elementary or high school students aged 18–21 were 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 use their TANF rules to determine Food Stamp program benefits, provided that 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- to 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- to 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 resid-

ing in the United States on August 22, 1996, and are (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 interoperable 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 Act 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 of residency in the United States became eligible for food stamps. Effective October 1, 2003, eligibility was 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 historically measured 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 semiannual 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).¹ As one of its 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>). 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 1995–1999.² Title III of the Coats Human Services Reauthorization Act of 1996 (P.L. 105-285) reauthorized and amended LIHEAP for fiscal years 2000–2004. No new provisions became effective in fiscal year 2002.

Under LIHEAP, grants are provided to grantees 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 2002 to 132 Indian tribes or tribal organizations and 5 insular areas.

In accordance with the Act, the secretary of Health and Human Services 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 1982–2002.

Funding

LIHEAP Block Grant Allotments

At the beginning of fiscal year 2002 (October 1, 2001), Congress passed a series of continuing resolutions that provided a percentage of funds for the LIHEAP program based on the appropriation level of \$1.4 billion for fiscal year 2001.

The president signed on January 10, 2002, the Departments of Labor, Health and Human Services, and Education, and Related Agencies Appropriations Act, 2002 (Public Law 107-116). This law appropriated \$1.7 billion in LIHEAP block grant funds for fiscal year 2002. After set-asides for tribal and insular area grantees, the states received \$1.65 billion.

LIHEAP Emergency Contingency Fund Allotments

Public Law 107-116 also appropriated \$300 million in LIHEAP emergency contingency funds for fiscal year 2002. The president can release such funds to meet additional home energy needs resulting from floods, earthquakes, tornadoes, hurricanes, or ice storms, as well as abnormal heat or cold. Also, such funds can be released 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 Income, or Temporary Assistance for Needy Families; or (4) unemployment, layoffs, or applications for unemployment benefits. The president has the authority to determine whether to release any of the contingency funds.

For the 6-week period from June 23 to August 3, 2002, parts of the nation experienced much hotter than normal temperatures. On August 8, 2002, the president notified Congress of his intent to make \$100 million in LIHEAP emergency contingency funds available. On August 9, 2002, the secretary released \$100 million to the 34 states (including the District of Columbia) that were most severely affected by the unusual heat to ease the high energy burdens of low-income households resulting from the extreme temperatures.

The contingency funds were allocated among the 34 states on the basis of the number of cooling degree days in excess of the 30-year norm for that period for that state, weighted by the number of households in the state below 125 percent of the poverty level.

1. 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.

2. 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.

In the 34 states that received contingency funds, there were 46 Indian tribes or tribal organizations that received direct LIHEAP funding from HHS. These tribes and tribal organizations also received a share of the \$100 million in contingency funds. Their contingency fund grant awards were based on the same share of the state's contingency allotment that the tribe or tribal organization received of the state's regular LIHEAP block grant allotment. All of the \$100 million in contingency funds released on August 9, 2002, had to be obligated by September 30, 2003, or returned to the federal government.

With the release of this \$100 million, \$200 million remained available in emergency contingency funds under the LIHEAP appropriation for fiscal year 2002. These remaining funds expired since they were not released by September 30, 2002.

In addition, the Supplemental Appropriations Act of 2001 (P.L. 107-20), signed into law on July 24, 2001, appropriated \$300 million in LIHEAP energy emergency contingency funds that remained available to HHS until expended (no-year funds). None of these funds were released in fiscal years 2001 and 2002.

Distribution of funds

LIHEAP funds for fiscal year 2002 were distributed approximately as follows:

- \$1.65 billion in block grants to the 50 states and the District of Columbia; \$16.4 million in direct block grants to 132 Indian tribes and tribal organizations; and \$2.3 million in block grants to the Commonwealth of Puerto Rico, Virgin Islands, American Samoa, Guam, and the Commonwealth of the Northern Mariana Islands;
- \$99.4 million in emergency contingency funds to 33 states and the District of Columbia and \$613 thousand to 46 Indian tribes and tribal organizations;
- \$19 million in leveraging incentive awards to 38 states and the District of Columbia, \$1.6 million in leveraging incentive awards to 28 Indian tribes and tribal organizations, and \$27 thousand in leveraging incentive awards to the Commonwealth of the Northern Mariana Islands;³
- \$5.5 million in Residential Energy Assistance Challenge (REACH) Option Program awards to 6 states, \$1 million to 7 Indian tribes and tribal organizations, \$150 thousand to the Commonwealth of

the Northern Mariana Islands, and \$265 thousand to states for their second- and third-year REACH administrative costs;⁴ 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;

3. LIHEAP leveraging incentive funds reward grantees that add private or nonfederal public resources to provide home energy assistance benefits to low-income households beyond what could be provided with federal resources.

4. REACH awards are made to LIHEAP grantees that submit qualifying plans that are approved by HHS for initiatives to implement innovative plans through local community-based agencies to help LIHEAP eligible households reduce their energy vulnerability.

-
- 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.

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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Section 2. History of Program Provisions and SSA Administrative Data

Old-Age, Survivors, and Disability Insurance

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Table 2.A1—Covered employment and self-employment provisions, by year enacted

| Year enacted | Coverage election or waiver | Provision |
|--------------|--|---|
| 1935 | ... | All workers in commerce and industry (except railroads) under age 65 in the continental United States, Alaska, and Hawaii and on American vessels. (Covered after 1936.) |
| 1939 | ... | Age restriction eliminated. |
| 1946 | ... | Railroad and Social Security earnings combined to determine eligibility for and amount of survivors benefits. |
| 1950 | ... | Regularly employed farm and domestic workers. Nonfarm self-employed (except members of professional groups). Federal civilian employees not under a federal retirement system. U.S. citizens employed outside the United States by American employers. Workers in Puerto Rico and the Virgin Islands (effective January 1, 1951). |
| | Elective by employer | State and local government employees not under a state and local government retirement system. Termination permitted 2 years after giving notice if group has 5 years of coverage when notice is given. |
| | Elective by employer and employee | Employees (other than members of the clergy) of nonprofit organizations (upon election by employer, each current employee given a choice as to coverage; new employees are covered). Nonprofit organizations permitted to terminate coverage 2 years after giving notice, if the organization has 8 years of coverage when notice is given. |
| 1951 | ... | Railroad workers with less than 10 years of service, for all benefits. (After October 1951, coverage retroactive to 1937.) |
| 1954 | ... | Farm self-employed. Professional self-employed except lawyers, dentists, physicians, and members of other medical groups (taxable years ending after 1954). Additional regularly employed farm and domestic workers. Homeworkers. |
| | Elective by employer | U.S. citizens employed outside the United States by a foreign subsidiary of an American employer. |
| | Elective by employer and employee | State and local government employees (except fire fighters and police personnel) under a state or local government retirement system (coverage provided at state's option; a majority of the eligible employees must vote in favor). See above (elective by employer, 1950) for termination rule. |
| | Elective by individual | Members of the clergy and of religious orders not under a vow of poverty. |
| 1956 | ... | Members of the uniformed services on active duty or on active duty for training. Remainder of professional self-employed except physicians (taxable years ending after 1955). Farm landlords who materially participate in farm operations. |
| | Elective by employer and employee | Fire fighters and police personnel in designated states. State and local government employees under a state or local government retirement system in designated states may be divided into two systems, one excluding employees not desiring coverage (new employees covered). |
| 1960 | ... | U.S. citizens employed in United States by foreign governments or international organizations. Parents working for children (except domestic or casual labor). Workers in Guam and American Samoa. |
| 1965 | ... | Interns. Self-employed physicians (taxable years ending on or after December 31, 1965). Tips for employee tax only. |
| | Elective by individual | Members of certain religious sects may obtain exemptions from self-employed coverage (retroactive to 1951). |
| 1967 | Elective by employer and employee | Fire fighters under state and local government retirement system (under a majority favorable vote) and only if governor of state certifies Social Security protection. |
| | Subject to waiver by individual | Members of the clergy and of religious orders not under a vow of poverty are covered automatically, but they can choose to be exempt on grounds of conscience or religious principles. Taxable years ending after 1967. |
| 1972 | Elective by employer | Members of a religious order who are subject to a vow of poverty. Retroactivity allowed for 5 years but not earlier than January 1, 1968. |
| 1977 | Elective by individual | Members of the clergy and of religious orders who filed an application for exemption from coverage may revoke the exemption if the revocation is filed before the due date of the individual's federal income tax return for the first taxable year beginning after December 20, 1977. |
| 1982 | ... | Federal employees—Hospital Insurance (Part A) program only, effective January 1, 1983. |
| 1983 | ... | Federal employees newly hired after December 31, 1983, including executive, legislative, and judicial branch employees, and also including those hired before January 1, 1984, with a break in service lasting more than 365 days. Excludes re-employed annuitants hired before January 1, 1984. |
| | ... | Legislative branch employees hired before 1984 who were not participating in the Civil Service Retirement System on December 31, 1983. |
| | ... | Members of Congress, the President, the Vice President, sitting federal judges, and most executive-level political appointees of the federal government. |
| | ... | Employees of nonprofit organizations. |
| | ... | U.S. residents employed outside the United States by American employers. |
| | Elective by employer | U.S. residents employed outside the United States by a foreign affiliate of an American employer. |
| | ... | Employees of nonprofit organizations placed under compulsory coverage; nonprofit organizations prohibited from terminating coverage of their employees on or after March 31, 1983. |
| | Elective by employer or by employer and employee | States prohibited from terminating coverage of employees (after April 20, 1983) and permitted to reinstate coverage for a terminated group. |

(Continued)

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

Table 2.A1—Covered employment and self-employment provisions, by year enacted—Continued

| Year enacted | Coverage election or waiver | Provision |
|--------------|-----------------------------|---|
| 1984 | ... | Rehired federal employees whose previous service was covered. |
| | ... | Persons exercising reemployment rights to noncovered federal employment retain exemption after a period (not limited to 365 or fewer days) of military or national guard service or work for an international organization. |
| | ... | Generally, all legislative branch employees except those who were participating on December 31, 1983, and are also currently participating in the Civil Service Retirement System or another federal retirement system. |
| | ... | Employees of nonprofit organizations who are also participating on a mandatory basis in the Civil Service Retirement System are treated like federal employees for Social Security tax and coverage purposes. They are therefore not covered unless hired on or after January 1, 1984, or reemployed after a break in service of more than 365 days. |
| | Elective by employer | Churches or church-related organizations may elect irrevocably to have services performed by their employees excluded from covered employment. Their employees are then treated as self-employed for Social Security purposes. |
| 1986 | ... | State and local government employees hired after March 31, 1986—Hospital Insurance (Part A) program only. |
| | Elective by individual | Members of the clergy and of religious orders who filed an application for exemption from coverage may revoke the exemption if the revocation is filed before the due date of the individual's federal income tax return for the first taxable year beginning after October 22, 1986. |
| 1987 | ... | Members of uniformed services reserve components on inactive duty training. Irregularly employed farm workers (if employer's annual expenditures for farm labor is at least \$2,500). Services performed in trade or business of spouse or by children aged 18 or older in trade or business of parent. For employers, the full amount of covered tips. |
| 1990 | ... | State and local government employees not under a state or local government retirement system. Exceptions: (1) students employed by the educational institution they attend and (2) election workers paid less than the mandated amount (\$100), unless either group covered under a state's Section 218 agreement. |
| 1994 | ... | Threshold for exclusion of wages paid to election workers raised from \$100 to \$1,000 annually beginning January 1, 1995, and will be indexed for wage increases each year after December 31, 1999. |
| | ... | Police and fire fighters under a public retirement system can be covered for Social Security in all states. |
| | ... | Threshold for coverage of domestic employees' earnings raised from \$50 per calendar quarter to \$1,000 per calendar year per employer; amount subject to annual automatic adjustments. Domestic workers no longer covered for years in which they were under age 18, unless they are no longer in school and domestic employment is their principal occupation. Coverage of earnings of domestic workers on farms becomes subject to new annual threshold for domestic workers instead of annual threshold for agricultural employees. |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

NOTE: ... = not applicable.

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

Table 2.A2—Noncontributory wage credit provisions, by year enacted

| Year enacted | Provision |
|--------------|---|
| 1946 | Fully insured status and average monthly wage of \$160 for World War II veterans who died within 3 years after discharge. |
| 1950 | Wage credits of \$160 per month of military service during World War II period (September 16, 1940–July 24, 1947). |
| 1952 | Wage credits of \$160 per month of military service to December 31, 1953. |
| 1953 | Wage credits of \$160 per month of military service to June 30, 1955. |
| 1955 | Wage credits of \$160 per month of military service to March 31, 1956. |
| 1956 | Wage credits of \$160 per month of military service to December 31, 1956. |
| 1967 | For uniformed services, wage credits of \$100 for each \$100 (or fraction thereof) of basic pay not in excess of \$300 per calendar quarter, beginning in 1968. |
| 1972 | For uniformed services, wage credits of \$300 per calendar quarter of service after 1956. (Supersedes 1967 provision.) For U.S. citizens of Japanese ancestry, wage credits for the period they were interned by the U.S. government during World War II period (December 7, 1941–December 31, 1946) and 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, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

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

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

Table 2.A3—Annual maximum taxable earnings and contribution rates, 1937–2004

| Year | Annual maximum taxable earnings (dollars) | | Contribution rate (percent) | | | | | | | | |
|-----------|---|----------------------|-----------------------------|-------|-------|------|----------------------|--------|--------|------|------|
| | | | Employer and employee, each | | | | Self-employed person | | | | |
| | OASDI | HI | Total, OASDI and HI | OASI | DI | HI | Total, OASDI and HI | OASI | DI | HI | |
| 1937–1949 | 3,000 | ... | 1.0 | 1.0 | ... | ... | ... | ... | ... | ... | ... |
| 1950 | 3,000 | ... | 1.5 | 1.5 | ... | ... | ... | ... | ... | ... | ... |
| 1951–1953 | 3,600 | ... | 1.5 | 1.5 | ... | ... | 2.25 | 2.25 | ... | ... | ... |
| 1954 | 3,600 | ... | 2.0 | 2.0 | ... | ... | 3.0 | 3.0 | ... | ... | ... |
| 1955–1956 | 4,200 | ... | 2.0 | 2.0 | ... | ... | 3.0 | 3.0 | ... | ... | ... |
| 1957–1958 | 4,200 | ... | 2.25 | 2.0 | 0.25 | ... | 3.375 | 3.0 | 0.375 | ... | ... |
| 1959 | 4,800 | ... | 2.5 | 2.25 | 0.25 | ... | 3.75 | 3.375 | 0.375 | ... | ... |
| 1960–1961 | 4,800 | ... | 3.0 | 2.75 | 0.25 | ... | 4.5 | 4.125 | 0.375 | ... | ... |
| 1962 | 4,800 | ... | 3.125 | 2.875 | 0.25 | ... | 4.7 | 4.325 | 0.375 | ... | ... |
| 1963–1965 | 4,800 | ... | 3.625 | 3.375 | 0.25 | ... | 5.4 | 5.025 | 0.375 | ... | ... |
| 1966 | 6,600 | 6,600 | 4.2 | 3.5 | 0.35 | 0.35 | 6.15 | 5.275 | 0.525 | 0.35 | 0.35 |
| 1967 | 6,600 | 6,600 | 4.4 | 3.55 | 0.35 | 0.5 | 6.4 | 5.375 | 0.525 | 0.5 | 0.5 |
| 1968 | 7,800 | 7,800 | 4.4 | 3.325 | 0.475 | 0.6 | 6.4 | 5.0875 | 0.7125 | 0.6 | 0.6 |
| 1969 | 7,800 | 7,800 | 4.8 | 3.725 | 0.475 | 0.6 | 6.9 | 5.5875 | 0.7125 | 0.6 | 0.6 |
| 1970 | 7,800 | 7,800 | 4.8 | 3.65 | 0.55 | 0.6 | 6.9 | 5.475 | 0.825 | 0.6 | 0.6 |
| 1971 | 7,800 | 7,800 | 5.2 | 4.05 | 0.55 | 0.6 | 7.5 | 6.075 | 0.825 | 0.6 | 0.6 |
| 1972 | 9,000 | 9,000 | 5.2 | 4.05 | 0.55 | 0.6 | 7.5 | 6.075 | 0.825 | 0.6 | 0.6 |
| 1973 | 10,800 | 10,800 | 5.85 | 4.3 | 0.55 | 1.0 | 8.0 | 6.205 | 0.795 | 1.0 | 1.0 |
| 1974 | 13,200 | 13,200 | 5.85 | 4.375 | 0.575 | 0.9 | 7.9 | 6.185 | 0.815 | 0.9 | 0.9 |
| 1975 | ^a 14,100 | ^a 14,100 | 5.85 | 4.375 | 0.575 | 0.9 | 7.9 | 6.185 | 0.815 | 0.9 | 0.9 |
| 1976 | ^a 15,300 | ^a 15,300 | 5.85 | 4.375 | 0.575 | 0.9 | 7.9 | 6.185 | 0.815 | 0.9 | 0.9 |
| 1977 | ^a 16,500 | ^a 16,500 | 5.85 | 4.375 | 0.575 | 0.9 | 7.9 | 6.185 | 0.815 | 0.9 | 0.9 |
| 1978 | ^a 17,700 | ^a 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 | ^a 32,400 | ^a 32,400 | 6.7 | 4.575 | 0.825 | 1.3 | 9.35 | 6.8125 | 1.2375 | 1.3 | 1.3 |
| 1983 | ^a 35,700 | ^a 35,700 | 6.7 | 4.775 | 0.625 | 1.3 | 9.35 | 7.1125 | 0.9375 | 1.3 | 1.3 |
| 1984 | ^a 37,800 | ^a 37,800 | ^b 7.0 | 5.2 | 0.5 | 1.3 | ^b 14.0 | 10.4 | 1.0 | 2.6 | 2.6 |
| 1985 | ^a 39,600 | ^a 39,600 | 7.05 | 5.2 | 0.5 | 1.35 | ^b 14.1 | 10.4 | 1.0 | 2.7 | 2.7 |
| 1986 | ^a 42,000 | ^a 42,000 | 7.15 | 5.2 | 0.5 | 1.45 | ^b 14.3 | 10.4 | 1.0 | 2.9 | 2.9 |
| 1987 | ^a 43,800 | ^a 43,800 | 7.15 | 5.2 | 0.5 | 1.45 | ^b 14.3 | 10.4 | 1.0 | 2.9 | 2.9 |
| 1988 | ^a 45,000 | ^a 45,000 | 7.51 | 5.53 | 0.53 | 1.45 | ^b 15.02 | 11.06 | 1.06 | 2.9 | 2.9 |
| 1989 | ^a 48,000 | ^a 48,000 | 7.51 | 5.53 | 0.53 | 1.45 | ^b 15.02 | 11.06 | 1.06 | 2.9 | 2.9 |
| 1990 | ^c 51,300 | ^c 51,300 | 7.65 | 5.6 | 0.6 | 1.45 | 15.3 | 11.2 | 1.2 | 2.9 | 2.9 |
| 1991 | ^c 53,400 | ^d 125,000 | 7.65 | 5.6 | 0.6 | 1.45 | 15.3 | 11.2 | 1.2 | 2.9 | 2.9 |
| 1992 | ^c 55,500 | 130,200 | 7.65 | 5.6 | 0.6 | 1.45 | 15.3 | 11.2 | 1.2 | 2.9 | 2.9 |
| 1993 | ^a 57,600 | ^a 135,000 | 7.65 | 5.6 | 0.6 | 1.45 | 15.3 | 11.2 | 1.2 | 2.9 | 2.9 |
| 1994 | ^a 60,600 | ^e | 7.65 | 5.26 | 0.94 | 1.45 | 15.3 | 10.52 | 1.88 | 2.9 | 2.9 |
| 1995 | ^a 61,200 | ^e | 7.65 | 5.26 | 0.94 | 1.45 | 15.3 | 10.52 | 1.88 | 2.9 | 2.9 |
| 1996 | ^a 62,700 | ^e | 7.65 | 5.26 | 0.94 | 1.45 | 15.3 | 10.52 | 1.88 | 2.9 | 2.9 |
| 1997 | ^a 65,400 | ^e | 7.65 | 5.35 | 0.85 | 1.45 | 15.3 | 10.7 | 1.7 | 2.9 | 2.9 |
| 1998 | ^a 68,400 | ^e | 7.65 | 5.35 | 0.85 | 1.45 | 15.3 | 10.7 | 1.7 | 2.9 | 2.9 |
| 1999 | ^a 72,600 | ^e | 7.65 | 5.35 | 0.85 | 1.45 | 15.3 | 10.7 | 1.7 | 2.9 | 2.9 |

(Continued)

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

Table 2.A3—Annual maximum taxable earnings and contribution rates, 1937–2004—Continued

| Year | Annual maximum taxable earnings (dollars) | | Contribution rate (percent) | | | | | | | |
|------|---|--------------|-----------------------------|------|-----|------|----------------------|------|-----|-----|
| | | | Employer and employee, each | | | | Self-employed person | | | |
| | OASDI | HI | Total, OASDI and HI | OASI | DI | HI | Total, OASDI and HI | OASI | DI | HI |
| 2000 | ^a 76,200 | ^e | 7.65 | 5.3 | 0.9 | 1.45 | 15.3 | 10.6 | 1.8 | 2.9 |
| 2001 | ^a 80,400 | ^e | 7.65 | 5.3 | 0.9 | 1.45 | 15.3 | 10.6 | 1.8 | 2.9 |
| 2002 | ^a 84,900 | ^e | 7.65 | 5.3 | 0.9 | 1.45 | 15.3 | 10.6 | 1.8 | 2.9 |
| 2003 | ^a 87,000 | ^e | 7.65 | 5.3 | 0.9 | 1.45 | 15.3 | 10.6 | 1.8 | 2.9 |
| 2004 | ^a 87,900 | ^e | 7.65 | 5.3 | 0.9 | 1.45 | 15.3 | 10.6 | 1.8 | 2.9 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

NOTE: . . . = not applicable.

- a. Based on automatic adjustment, under legislation in 1972 (as modified by legislation in 1973), in proportion to increases in average wage level.
- b. Tables 2.A3 and 2.A4 show the tax rate and tax amount paid by employers and received by the OASDI trust funds. In 1984, the 5.7 percent OASDI tax on taxable wages of employees was offset by a tax credit of 0.3 percent, resulting in an effective employee tax rate of 5.4 percent. However, the OASDI trust funds received the full 5.7 percent because of a general revenue transfer equivalent to 0.3 percent of taxable wages. Similar credits of 2.7 percent, 2.3 percent, and 2.0 percent were allowed against the combined OASDI and HI taxes on net earnings from self-employment in 1984, 1985, and from 1986 to 1989, respectively.
- c. Based on automatic adjustment, under legislation in 1972 (as modified by legislation in 1973), using a transitional rule, specified by the Omnibus Budget Reconciliation Act (OBRA) of 1989, for computing a "deemed" average annual wage for 1988, 1989, and 1990.
- d. Based on legislation in 1990.
- e. Upper limit on earnings subject to HI taxes was repealed by OBRA 1993.

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

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

Table 2.A4—Maximum annual amount of contributions, 1937–2004 (in dollars)

| Year | Employee | | | | | Self-employed person | | | | |
|-------------------|---------------------|-----------------|-----------|---------|--------------|----------------------|-----------------|------------|----------|--------------|
| | Total, OASDI and HI | Subtotal, OASDI | OASI | DI | HI | Total, OASDI and HI | Subtotal, OASDI | OASI | DI | HI |
| 1937–1949 | 30.00 | 30.00 | 30.00 | ... | ... | ... | ... | ... | ... | ... |
| 1950 | 45.00 | 45.00 | 45.00 | ... | ... | ... | ... | ... | ... | ... |
| 1951–1953 | 54.00 | 54.00 | 54.00 | ... | ... | 81.00 | 81.00 | 81.00 | ... | ... |
| 1954 | 72.00 | 72.00 | 72.00 | ... | ... | 108.00 | 108.00 | 108.00 | ... | ... |
| 1955–1956 | 84.00 | 84.00 | 84.00 | ... | ... | 126.00 | 126.00 | 126.00 | ... | ... |
| 1957–1958 | 94.50 | 94.50 | 84.00 | 10.50 | ... | 141.75 | 141.75 | 126.00 | 15.75 | ... |
| 1959 | 120.00 | 120.00 | 108.00 | 12.00 | ... | 180.00 | 180.00 | 162.00 | 18.00 | ... |
| 1960–1961 | 144.00 | 144.00 | 132.00 | 12.00 | ... | 216.00 | 216.00 | 198.00 | 18.00 | ... |
| 1962 | 150.00 | 150.00 | 138.00 | 12.00 | ... | 225.60 | 225.60 | 207.60 | 18.00 | ... |
| 1963–1965 | 174.00 | 174.00 | 162.00 | 12.00 | ... | 259.20 | 259.20 | 241.20 | 18.00 | ... |
| 1966 | 277.20 | 254.10 | 231.00 | 23.10 | 23.10 | 405.90 | 382.80 | 348.15 | 34.65 | 23.10 |
| 1967 | 290.40 | 257.40 | 234.30 | 23.10 | 33.00 | 422.40 | 389.40 | 354.75 | 34.65 | 33.00 |
| 1968 | 343.20 | 296.40 | 259.35 | 37.05 | 46.80 | 499.20 | 452.40 | 396.825 | 55.575 | 46.80 |
| 1969 | 374.40 | 327.60 | 290.55 | 37.05 | 46.80 | 538.20 | 491.40 | 435.825 | 55.575 | 46.80 |
| 1970 | 374.40 | 327.60 | 284.70 | 42.90 | 46.80 | 538.20 | 491.40 | 427.05 | 64.35 | 46.80 |
| 1971 | 405.60 | 358.80 | 315.90 | 42.90 | 46.80 | 585.00 | 538.20 | 473.85 | 64.35 | 46.80 |
| 1972 | 468.00 | 414.00 | 364.50 | 49.50 | 54.00 | 675.00 | 621.00 | 546.75 | 74.25 | 54.00 |
| 1973 | 631.80 | 523.80 | 464.40 | 59.40 | 108.00 | 864.00 | 756.00 | 670.14 | 85.86 | 108.00 |
| 1974 | 772.20 | 653.40 | 577.50 | 75.90 | 118.80 | 1,042.80 | 924.00 | 816.42 | 107.58 | 118.80 |
| 1975 | 824.85 | 697.95 | 616.875 | 81.075 | 126.90 | 1,113.90 | 987.00 | 872.085 | 114.915 | 126.90 |
| 1976 | 895.05 | 757.35 | 669.375 | 87.975 | 137.70 | 1,208.70 | 1,071.00 | 946.305 | 124.695 | 137.70 |
| 1977 | 965.25 | 816.75 | 721.875 | 94.875 | 148.50 | 1,303.50 | 1,155.00 | 1,020.525 | 134.475 | 148.50 |
| 1978 | 1,070.85 | 893.85 | 756.675 | 137.175 | 177.00 | 1,433.70 | 1,256.70 | 1,063.77 | 192.93 | 177.00 |
| 1979 | 1,403.77 | 1,163.32 | 991.59 | 171.75 | 240.45 | 1,854.90 | 1,614.45 | 1,376.29 | 238.16 | 240.45 |
| 1980 | 1,587.67 | 1,315.72 | 1,170.68 | 145.04 | 271.95 | 2,097.90 | 1,825.95 | 1,624.58 | 201.37 | 271.95 |
| 1981 | 1,975.05 | 1,588.95 | 1,395.90 | 193.05 | 386.10 | 2,762.10 | 2,376.00 | 2,086.43 | 289.57 | 386.10 |
| 1982 | 2,170.80 | 1,749.60 | 1,482.30 | 267.30 | 421.20 | 3,029.40 | 2,608.20 | 2,207.25 | 400.95 | 421.20 |
| 1983 | 2,391.90 | 1,927.80 | 1,704.675 | 223.125 | 464.10 | 3,337.95 | 2,873.85 | 2,539.1625 | 334.6875 | 464.10 |
| 1984 ^a | 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 ^a | 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 ^a | 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 ^a | 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 ^a | 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 ^a | 3,604.80 | 2,908.80 | 2,654.40 | 254.40 | 696.00 | 7,209.60 | 5,817.60 | 5,308.80 | 508.80 | 1,392.00 |
| 1990 | 3,924.45 | 3,180.60 | 2,872.80 | 307.80 | 743.85 | 7,848.90 | 6,361.20 | 5,745.60 | 615.60 | 1,487.70 |
| 1991 | 5,123.30 | 3,310.80 | 2,990.40 | 320.40 | 1,812.50 | 10,246.60 | 6,621.60 | 5,980.80 | 640.80 | 3,625.00 |
| 1992 | 5,328.90 | 3,441.00 | 3,108.00 | 333.00 | 1,887.90 | 10,657.80 | 6,882.00 | 6,216.00 | 666.00 | 3,775.80 |
| 1993 | 5,528.70 | 3,571.20 | 3,225.60 | 345.60 | 1,957.50 | 11,057.40 | 7,142.40 | 6,451.20 | 691.20 | 3,915.00 |
| 1994 | ^b | 3,757.20 | 3,187.56 | 569.64 | ^b | ^b | 7,514.40 | 6,375.12 | 1,139.28 | ^b |
| 1995 | ^b | 3,794.40 | 3,219.12 | 575.28 | ^b | ^b | 7,588.80 | 6,438.24 | 1,150.56 | ^b |
| 1996 | ^b | 3,887.40 | 3,298.02 | 589.38 | ^b | ^b | 7,774.80 | 6,596.04 | 1,178.76 | ^b |
| 1997 | ^b | 4,054.80 | 3,498.90 | 555.90 | ^b | ^b | 8,109.60 | 6,997.80 | 1,111.80 | ^b |
| 1998 | ^b | 4,240.80 | 3,659.40 | 581.40 | ^b | ^b | 8,481.60 | 7,318.80 | 1,162.80 | ^b |
| 1999 | ^b | 4,501.20 | 3,884.10 | 617.10 | ^b | ^b | 9,002.40 | 7,768.20 | 1,234.20 | ^b |
| 2000 | ^b | 4,724.40 | 4,038.60 | 685.80 | ^b | ^b | 9,448.80 | 8,077.20 | 1,371.60 | ^b |
| 2001 | ^b | 4,984.80 | 4,261.20 | 723.60 | ^b | ^b | 9,969.60 | 8,522.40 | 1,447.20 | ^b |
| 2002 | ^b | 5,236.80 | 4,499.70 | 764.10 | ^b | ^b | 10,527.60 | 8,999.40 | 1,528.20 | ^b |
| 2003 | ^b | 5,394.00 | 4,611.00 | 783.00 | ^b | ^b | 10,788.00 | 9,222.00 | 1,566.00 | ^b |
| 2004 | ^b | 5,449.80 | 4,658.70 | 791.10 | ^b | ^b | 10,899.60 | 9,317.40 | 1,582.20 | ^b |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

NOTE: ... = not applicable.

- Tables 2.A3 and 2.A4 show the tax rate and tax amount paid by employers and received by the OASDI trust funds. In 1984, the 5.7 percent OASDI tax on taxable wages of employees was offset by a tax credit of 0.3 percent, resulting in an effective employee tax rate of 5.4 percent. However, the OASDI trust funds received the full 5.7 percent because of a general revenue transfer equivalent to 0.3 percent of taxable wages. Similar credits of 2.7 percent, 2.3 percent, and 2.0 percent were allowed against the combined OASDI and HI taxes on net earnings from self-employment in 1984, 1985, and from 1986 to 1989, respectively.
- Upper limit on earnings subject to HI taxes was repealed by the Omnibus Budget Reconciliation Act (OBRA) of 1993.

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

Table 2.A5—Tax credits enacted in 1983

| Group | Tax payable under— | Percentage of earnings | Tax credit, effective with respect to— |
|---------------|--|------------------------|--|
| Employee | Federal Insurance Contributions Act (FICA) | 0.3 | Remuneration paid in calendar year 1984 |
| Self-employed | Self-Employment Contributions Act (SECA) | 2.7 | Self-employment income for taxable years beginning in 1984 |
| | | 2.3 | Self-employment income for taxable years beginning in 1985 |
| | | 2.0 | Self-employment income for taxable years beginning in 1986, 1987, 1988, and 1989 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

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

Tables 2.A3 and 2.A4 show the tax rate and tax amount paid by employers and received by the OASDI trust funds. In 1984, the 5.7 percent OASDI tax on taxable wages of employees was offset by a tax credit of 0.3 percent, resulting in an effective employee tax rate of 5.4 percent. However, the OASDI trust funds received the full 5.7 percent because of a general revenue transfer equivalent to 0.3 percent of taxable wages. Similar credits of 2.7 percent, 2.3 percent, and 2.0 percent were allowed against the combined OASDI and HI taxes on net earnings from self-employment in 1984, 1985, and from 1986 to 1989, respectively.

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Table 2.A6—Appropriations from general revenues and interfund borrowing provisions, by type of transaction and year enacted

| Year enacted | Provision |
|---|--|
| Appropriations from general revenues | |
| 1935 | Annual appropriations to the old-age reserve account to provide payments; direct appropriation to pay for administrative expenses. |
| 1939 | Trust fund created from which benefits and administrative expenses were to be paid. |
| 1944 | General authorization to finance benefits and payments. |
| 1947 | For cost of gratuitous military service wage credits. |
| 1950 | General authorization repealed. |
| 1951 | Railroad interchange provisions enacted. |
| 1956 | For cost of gratuitous military service wage credits. |
| 1966 | For cost of transitional uninsured monthly benefits for those aged 72 and older with fewer than 3 quarters of coverage. |
| 1972 | For cost of gratuitous wage credits for Japanese-American internees. |
| 1983 | A lump-sum payment to the OASDI trust funds equal to (1) the present value of the estimated additional benefits arising from the gratuitous military service wage credits for service before 1957 and (2) the amount of the combined employer-employee OASDI taxes on the gratuitous wage credits for service after 1956 and before 1984 but less any amounts previously transferred. After 1983, the trust funds will be reimbursed on a current basis for employer-employee taxes on such wage credits for service after 1983. A lump-sum payment to the OASDI trust funds representing the amount of uncashed benefit checks (including interest) issued in the past. In the future, the trust funds will be credited on a regular basis. All transfers made for uncashed benefit checks will be subject to the annual appropriation process. Transfers in each year from the Treasury Department to the OASDI trust funds of amounts equal to income tax receipts attributable to inclusion of Social Security benefits in taxable income. For tax credits for part of the 1984 employment FICA tax and part of the tax on self-employment income under SECA for 1984–1989, see Table 2.A5. |
| 1993 | Transfers in each year from the Treasury Department to the 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. |
| Interfund borrowing | |
| 1981 | Interfund borrowing permitted among OASI, DI, and HI trust funds as needed until December 31, 1982. For all or part of any loan to be repaid, the managing trustee determines if assets of borrowing trust fund(s) are sufficient for that purpose. Interest with respect to any outstanding loan balance at a rate equal to the rate earned by lending trust fund is transferred from time to time. |
| 1983 | Interfund borrowing reauthorized among OASI, DI, and HI trust funds for calendar years 1983–1987, with provisions for scheduled repayment, no later than December 31, 1989, of principal and interest (including amounts borrowed in 1982). No borrowing permitted from any fund that has been reduced to specified levels. |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

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

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

| Year enacted | Provision | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------|--|------|------------------|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|------|-----|
| | Quarter of coverage | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1939 | Calendar quarter in which \$50 of wages is earned. Four quarters of coverage (QC) are credited for covered earnings equal to maximum limitation for the year. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1946 | Calendar quarter in which \$50 of wages is paid. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1950 | Calendar quarter credited with \$100 of self-employment income (reported annually). | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1954 | Calendar quarter credited with \$100 of agricultural wages (reported annually). | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1977 | Calendar quarters of coverage (up to 4) for each \$250 of annual earnings, effective January 1, 1978 (<i>effective on January 1 of each year, dollar amount subject to automatic increase</i>): | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | <table border="0"> <thead> <tr> <th style="text-align: left;">Year</th> <th style="text-align: left;">Amount (dollars)</th> </tr> </thead> <tbody> <tr><td>1979</td><td>260</td></tr> <tr><td>1980</td><td>290</td></tr> <tr><td>1981</td><td>310</td></tr> <tr><td>1982</td><td>340</td></tr> <tr><td>1983</td><td>370</td></tr> <tr><td>1984</td><td>390</td></tr> <tr><td>1985</td><td>410</td></tr> <tr><td>1986</td><td>440</td></tr> <tr><td>1987</td><td>460</td></tr> <tr><td>1988</td><td>470</td></tr> <tr><td>1989</td><td>500</td></tr> <tr><td>1990</td><td>520</td></tr> <tr><td>1991</td><td>540</td></tr> <tr><td>1992</td><td>570</td></tr> <tr><td>1993</td><td>590</td></tr> <tr><td>1994</td><td>620</td></tr> <tr><td>1995</td><td>630</td></tr> <tr><td>1996</td><td>640</td></tr> <tr><td>1997</td><td>670</td></tr> <tr><td>1998</td><td>700</td></tr> <tr><td>1999</td><td>740</td></tr> <tr><td>2000</td><td>780</td></tr> <tr><td>2001</td><td>830</td></tr> <tr><td>2002</td><td>870</td></tr> <tr><td>2003</td><td>890</td></tr> <tr><td>2004</td><td>900</td></tr> </tbody> </table> | Year | Amount (dollars) | 1979 | 260 | 1980 | 290 | 1981 | 310 | 1982 | 340 | 1983 | 370 | 1984 | 390 | 1985 | 410 | 1986 | 440 | 1987 | 460 | 1988 | 470 | 1989 | 500 | 1990 | 520 | 1991 | 540 | 1992 | 570 | 1993 | 590 | 1994 | 620 | 1995 | 630 | 1996 | 640 | 1997 | 670 | 1998 | 700 | 1999 | 740 | 2000 | 780 | 2001 | 830 | 2002 | 870 | 2003 | 890 | 2004 | 900 |
| Year | Amount (dollars) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1979 | 260 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1980 | 290 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1981 | 310 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1982 | 340 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1983 | 370 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1984 | 390 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1985 | 410 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1986 | 440 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1987 | 460 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1988 | 470 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1989 | 500 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1990 | 520 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1991 | 540 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1992 | 570 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1993 | 590 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1994 | 620 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995 | 630 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1996 | 640 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997 | 670 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1998 | 700 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1999 | 740 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2000 | 780 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2001 | 830 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2002 | 870 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2003 | 890 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2004 | 900 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Disability definition | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1954 | Inability to engage in substantial gainful activity because of any medically determinable permanent physical or mental impairment. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1965 | Disability lasting at least 12 months. For blind persons aged 55–64, inability to engage in usual occupation. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1967 | Disability that precludes engagement in any substantial gainful work existing in the national economy. For surviving spouse, disability precludes any gainful activity. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1990 | More restrictive definition for surviving spouse eliminated. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Period of disability | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1954 | Continuous period of at least 6 months as defined above or of blindness. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1972 | At least 5 months of disability. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

(Continued)

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

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

| Year enacted | Provision |
|---|---|
| Fully insured | |
| 1935 | Cumulative wages of \$2,000 and employment in each of 5 years after 1936 and before attainment of age 65. |
| 1939 | QC equal to one-half the quarters elapsed after 1936 (or quarter in which age 21 attained) and before quarter of death or attainment of age 65. Minimum 6 QC, maximum 40 QC. |
| 1950 | Elapsed period measured after 1950 (QC earned at any time are used). |
| 1954 | Period of disability excluded from elapsed period. Alternatively, QC earned in all quarters after 1954 and before quarter in which age 65 attained (minimum 6 QC). |
| 1956 | Elapsed period measured to age 62 for women. Alternatively, QC earned in all except 4 quarters after 1954 and before quarter in which age 65 attained (62 for women). |
| 1960 | QC reduced to one-third the elapsed quarters. |
| 1961 | QC equal to years elapsed after 1950 (or year age 21 attained) and before year of death or age 65 (62 for women). |
| 1972 | Elapsed period for men reaching age 62 after 1972, measured to age 62 or to 1975, if later. |
| 1983 | Any person aged 55 or older on January 1, 1984, and employed by a nonprofit organization to whose employees coverage is extended solely by reason of the new compulsory coverage provision will be deemed fully insured upon subsequently acquiring 6 QC if aged 60 or older on January 1, 1984; 8 QC if aged 59; 12 QC if aged 58; 16 QC if aged 57; and 20 QC if aged 55 or 56. |
| Currently insured | |
| 1939 | 6 QC earned in 12 quarters before quarter of death. |
| 1946 | 6 QC earned in preceding 13 quarters, including quarter of death. |
| 1950 | Including quarter of retirement added. |
| 1954 | Including quarter of disablement added. |
| Disability insured | |
| 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. |
| Transitionally insured | |
| 1965 | Same as fully insured, but minimum reduced to 3 QC. |
| Requirement for special age-72 monthly benefit | |
| 1966 | 3 QC for each year elapsed after 1966 and before attainment of age 72. (No QC if aged 72 before 1968.) |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A8—Factors for indexing earnings, 1951–2004

| Year | Annual maximum taxable earnings (dollars) | Average annual wage ^a (dollars) | Factors for workers who were first eligible (attained age 62, became disabled, or died) in ^b — | | | | | | |
|------|---|--|---|-----------|-----------|-----------|-----------|-----------|-----------|
| | | | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 |
| 1951 | 3,600 | 2,799.16 | 7.1805649 | 7.5122465 | 7.7921948 | 8.1936795 | 8.2641471 | 8.4859494 | 8.8260978 |
| 1952 | 3,600 | 2,973.32 | 6.7599687 | 7.0722223 | 7.3357728 | 7.7137409 | 7.7800809 | 7.9888912 | 8.3091157 |
| 1953 | 3,600 | 3,139.44 | 6.4022724 | 6.6980035 | 6.9476085 | 7.3055768 | 7.3684065 | 7.5661679 | 7.8694481 |
| 1954 | 3,600 | 3,155.64 | 6.3694053 | 6.6636182 | 6.9119418 | 7.2680724 | 7.3305795 | 7.5273257 | 7.8290489 |
| 1955 | 4,200 | 3,301.44 | 6.0881161 | 6.3693358 | 6.6066928 | 6.9470958 | 7.0068425 | 7.1948998 | 7.4832982 |
| 1956 | 4,200 | 3,532.36 | 5.6901194 | 5.9529550 | 6.1747953 | 6.4929452 | 6.5487861 | 6.7245496 | 6.9940946 |
| 1957 | 4,200 | 3,641.72 | 5.5192464 | 5.7741891 | 5.9893677 | 6.2979636 | 6.3521276 | 6.5226129 | 6.7840636 |
| 1958 | 4,200 | 3,673.80 | 5.4710518 | 5.7237683 | 5.9370679 | 6.2429691 | 6.2966601 | 6.4656568 | 6.7248244 |
| 1959 | 4,800 | 3,855.80 | 5.2128093 | 5.4535972 | 5.6568287 | 5.9482909 | 5.9994476 | 6.1604673 | 6.4074018 |
| 1960 | 4,800 | 4,007.12 | 5.0159591 | 5.2476542 | 5.4432111 | 5.7236669 | 5.7728918 | 5.9278310 | 6.1654405 |
| 1961 | 4,800 | 4,086.76 | 4.9182115 | 5.1453915 | 5.3371375 | 5.6121279 | 5.6603936 | 5.8123134 | 6.0452926 |
| 1962 | 4,800 | 4,291.40 | 4.6836813 | 4.9000280 | 5.0826304 | 5.3445076 | 5.3904716 | 5.5351470 | 5.7570164 |
| 1963 | 4,800 | 4,396.64 | 4.5715706 | 4.7827386 | 4.9609702 | 5.2165790 | 5.2614428 | 5.4026552 | 5.6192138 |
| 1964 | 4,800 | 4,576.32 | 4.3920770 | 4.5949540 | 4.7661877 | 5.0117605 | 5.0548629 | 5.1905308 | 5.3985866 |
| 1965 | 4,800 | 4,658.72 | 4.3143932 | 4.5136819 | 4.6818869 | 4.9231162 | 4.9654562 | 5.0987245 | 5.3031004 |
| 1966 | 6,600 | 4,938.36 | 4.0700860 | 4.2580897 | 4.4167699 | 4.6443394 | 4.6842818 | 4.8100037 | 5.0028066 |
| 1967 | 6,600 | 5,213.44 | 3.8553335 | 4.0334175 | 4.1837251 | 4.3992872 | 4.4371221 | 4.5562105 | 4.7388404 |
| 1968 | 7,800 | 5,571.76 | 3.6073969 | 3.7740283 | 3.9146697 | 4.1163690 | 4.1517707 | 4.2632005 | 4.4340855 |
| 1969 | 7,800 | 5,893.76 | 3.4103102 | 3.5678378 | 3.7007954 | 3.8914751 | 3.9249427 | 4.0302846 | 4.1918334 |
| 1970 | 7,800 | 6,186.24 | 3.2490738 | 3.3991536 | 3.5258251 | 3.7074895 | 3.7393748 | 3.8397363 | 3.9936472 |
| 1971 | 7,800 | 6,497.08 | 3.0936282 | 3.2365278 | 3.3571389 | 3.5301120 | 3.5604718 | 3.6560316 | 3.8025790 |
| 1972 | 9,000 | 7,133.80 | 2.8175096 | 2.9476548 | 3.0575009 | 3.2150355 | 3.2426855 | 3.3297163 | 3.4631837 |
| 1973 | 10,800 | 7,580.16 | 2.6515997 | 2.7740813 | 2.8774591 | 3.0257171 | 3.0517390 | 3.1336449 | 3.2592531 |
| 1974 | 13,200 | 8,030.76 | 2.5028204 | 2.6184296 | 2.7160070 | 2.8559464 | 2.8805082 | 2.9578184 | 3.0763788 |
| 1975 | 14,100 | 8,630.92 | 2.3287842 | 2.4363544 | 2.5271466 | 2.6573552 | 2.6802091 | 2.7521435 | 2.8624596 |
| 1976 | 15,300 | 9,226.48 | 2.1784635 | 2.2790902 | 2.3640218 | 2.4858256 | 2.5072043 | 2.5744954 | 2.6776907 |
| 1977 | 16,500 | 9,779.44 | 2.0552864 | 2.1502233 | 2.2303527 | 2.3452693 | 2.3654391 | 2.4289254 | 2.5262858 |
| 1978 | 17,700 | 10,556.03 | 1.9040823 | 1.9920349 | 2.0662692 | 2.1727316 | 2.1914176 | 2.2502333 | 2.3404310 |
| 1979 | 22,900 | 11,479.46 | 1.7509142 | 1.8317917 | 1.9000545 | 1.9979529 | 2.0151357 | 2.0692202 | 2.1521622 |
| 1980 | 25,900 | 12,513.46 | 1.6062344 | 1.6804289 | 1.7430511 | 1.8328600 | 1.8486230 | 1.8982384 | 1.9743268 |
| 1981 | 29,700 | 13,773.10 | 1.4593338 | 1.5267427 | 1.5836377 | 1.6652330 | 1.6795543 | 1.7246321 | 1.7937618 |
| 1982 | 32,400 | 14,531.34 | 1.3831863 | 1.4470778 | 1.5010040 | 1.5783417 | 1.5919158 | 1.6346414 | 1.7001639 |
| 1983 | 35,700 | 15,239.24 | 1.3189339 | 1.3798575 | 1.4312787 | 1.5050239 | 1.5179674 | 1.5587083 | 1.6211871 |
| 1984 | 37,800 | 16,135.07 | 1.2457058 | 1.3032469 | 1.3518132 | 1.4214639 | 1.4336889 | 1.4721678 | 1.5311777 |
| 1985 | 39,600 | 16,822.51 | 1.1948009 | 1.2499906 | 1.2965723 | 1.3633768 | 1.3751022 | 1.4120087 | 1.4686072 |
| 1986 | 42,000 | 17,321.82 | 1.1603602 | 1.2139590 | 1.2591979 | 1.3240768 | 1.3354642 | 1.3713068 | 1.4262739 |
| 1987 | 43,800 | 18,426.51 | 1.0907953 | 1.1411808 | 1.1837076 | 1.2446969 | 1.2554016 | 1.2890954 | 1.3407672 |
| 1988 | 45,000 | 19,334.04 | 1.0395939 | 1.0876144 | 1.1281450 | 1.1862715 | 1.1964737 | 1.2285860 | 1.2778323 |
| 1989 | 48,000 | 20,099.55 | 1.0000000 | 1.0461916 | 1.0851785 | 1.1410912 | 1.1509049 | 1.1817941 | 1.2291648 |
| 1990 | 51,300 | 21,027.98 | 1.0000000 | 1.0000000 | 1.0372656 | 1.0907096 | 1.1000900 | 1.1296154 | 1.1748946 |
| 1991 | 53,400 | 21,811.60 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0515240 | 1.0605673 | 1.0890320 | 1.1326844 |
| 1992 | 55,500 | 22,935.42 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0086002 | 1.0356702 | 1.0771837 |
| 1993 | 57,600 | 23,132.67 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0268391 | 1.0679986 |
| 1994 | 60,600 | 23,753.53 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0400837 |
| 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 | 32,921.92 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 |
| 2002 | 84,900 | 33,252.09 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 |
| 2003 | 87,000 | ... | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 |
| 2004 | 87,900 | ... | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 |

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A8—Factors for indexing earnings, 1951–2004—Continued

| Year | Annual maximum taxable earnings (dollars) | Average annual wage ^a (dollars) | Factors for workers who were first eligible (attained age 62, became disabled, or died) in ^b — | | | | | | |
|------|---|--|---|-----------|------------|------------|------------|------------|------------|
| | | | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 1951 | 3,600 | 2,799.16 | 9.2577416 | 9.7979394 | 10.3107504 | 10.8853513 | 11.4873105 | 11.7613570 | 11.8793102 |
| 1952 | 3,600 | 2,973.32 | 8.7154763 | 9.2240324 | 9.7068059 | 10.2477500 | 10.8144498 | 11.0724443 | 11.1834885 |
| 1953 | 3,600 | 3,139.44 | 8.2543065 | 8.7359529 | 9.1931809 | 9.7055016 | 10.2422152 | 10.4865581 | 10.5917265 |
| 1954 | 3,600 | 3,155.64 | 8.2119317 | 8.6911054 | 9.1459862 | 9.6556768 | 10.1896351 | 10.4327236 | 10.5373522 |
| 1955 | 4,200 | 3,301.44 | 7.8492718 | 8.3072841 | 8.7420762 | 9.2292575 | 9.7396348 | 9.9719880 | 10.0719959 |
| 1956 | 4,200 | 3,532.36 | 7.3361435 | 7.7642143 | 8.1705828 | 8.6259158 | 9.1029284 | 9.3200919 | 9.4135620 |
| 1957 | 4,200 | 3,641.72 | 7.1158409 | 7.5310568 | 7.9252221 | 8.3668816 | 8.8295695 | 9.0402118 | 9.1308750 |
| 1958 | 4,200 | 3,673.80 | 7.0537046 | 7.4652948 | 7.8560183 | 8.2938211 | 8.7524688 | 8.9612717 | 9.0511432 |
| 1959 | 4,800 | 3,855.80 | 6.7207583 | 7.1129208 | 7.4852015 | 7.9023393 | 8.3393381 | 8.5382852 | 8.6239146 |
| 1960 | 4,800 | 4,007.12 | 6.4669638 | 6.8443171 | 7.2025395 | 7.6039250 | 8.0244215 | 8.2158558 | 8.2982516 |
| 1961 | 4,800 | 4,086.76 | 6.3409400 | 6.7109397 | 7.0621813 | 7.4557449 | 7.8680471 | 8.0557508 | 8.1365409 |
| 1962 | 4,800 | 4,291.40 | 6.0385655 | 6.3909214 | 6.7254136 | 7.1002097 | 7.4928508 | 7.6716037 | 7.7485413 |
| 1963 | 4,800 | 4,396.64 | 5.8940236 | 6.2379453 | 6.5644310 | 6.9302558 | 7.3134985 | 7.4879726 | 7.5630686 |
| 1964 | 4,800 | 4,576.32 | 5.6626066 | 5.9930250 | 6.3066918 | 6.6581533 | 7.0263487 | 7.1939724 | 7.2661199 |
| 1965 | 4,800 | 4,658.72 | 5.5624506 | 5.8870248 | 6.1951437 | 6.5403888 | 6.9020718 | 7.0667308 | 7.1376022 |
| 1966 | 6,600 | 4,938.36 | 5.2474708 | 5.5536656 | 5.8443370 | 6.1700322 | 6.5112345 | 6.6665695 | 6.7334277 |
| 1967 | 6,600 | 5,213.44 | 4.9705952 | 5.2606341 | 5.5359686 | 5.8444789 | 6.1676782 | 6.3148171 | 6.3781476 |
| 1968 | 7,800 | 5,571.76 | 4.6509361 | 4.9223226 | 5.1799503 | 5.4686203 | 5.7710346 | 5.9087111 | 5.9679688 |
| 1969 | 7,800 | 5,893.76 | 4.3968367 | 4.6533961 | 4.8969486 | 5.1698474 | 5.4557396 | 5.5858942 | 5.6419145 |
| 1970 | 7,800 | 6,186.24 | 4.1889581 | 4.4333876 | 4.6654252 | 4.9254216 | 5.1977970 | 5.3217981 | 5.3751697 |
| 1971 | 7,800 | 6,497.08 | 3.9885456 | 4.2212809 | 4.4422171 | 4.6897745 | 4.9491187 | 5.0671871 | 5.1180053 |
| 1972 | 9,000 | 7,133.80 | 3.6325521 | 3.8445148 | 4.0457316 | 4.2711935 | 4.5073902 | 4.6149205 | 4.6612030 |
| 1973 | 10,800 | 7,580.16 | 3.4186482 | 3.6181294 | 3.8074975 | 4.0196830 | 4.2419711 | 4.3431695 | 4.3867267 |
| 1974 | 13,200 | 8,030.76 | 3.2268303 | 3.4151189 | 3.5938616 | 3.7941415 | 4.0039573 | 4.0994775 | 4.1405907 |
| 1975 | 14,100 | 8,630.92 | 3.0024493 | 3.1776450 | 3.3439587 | 3.5303119 | 3.7255379 | 3.8144161 | 3.8526704 |
| 1976 | 15,300 | 9,226.48 | 2.8086443 | 2.9725312 | 3.1281095 | 3.3024339 | 3.4850582 | 3.5681994 | 3.6039844 |
| 1977 | 16,500 | 9,779.44 | 2.6498348 | 2.8044551 | 2.9512365 | 3.1157040 | 3.2880022 | 3.3664423 | 3.4002039 |
| 1978 | 17,700 | 10,556.03 | 2.4548907 | 2.5981359 | 2.7341188 | 2.8864867 | 3.0461092 | 3.1187786 | 3.1500564 |
| 1979 | 22,900 | 11,479.46 | 2.2574145 | 2.3891368 | 2.5141810 | 2.6542921 | 2.8010743 | 2.8678980 | 2.8966598 |
| 1980 | 25,900 | 12,513.46 | 2.0708821 | 2.1917200 | 2.3064316 | 2.4349652 | 2.5696186 | 2.6309206 | 2.6573058 |
| 1981 | 29,700 | 13,773.10 | 1.8814864 | 1.9912728 | 2.0954934 | 2.2122717 | 2.3346102 | 2.3903057 | 2.4142778 |
| 1982 | 32,400 | 14,531.34 | 1.7833111 | 1.8873690 | 1.9861513 | 2.0968362 | 2.2127911 | 2.2655805 | 2.2883017 |
| 1983 | 35,700 | 15,239.24 | 1.7004719 | 1.7996960 | 1.8938897 | 1.9994330 | 2.1100015 | 2.1603387 | 2.1820045 |
| 1984 | 37,800 | 16,135.07 | 1.6060606 | 1.6997757 | 1.7887397 | 1.8884232 | 1.9928528 | 2.0403952 | 2.0608581 |
| 1985 | 39,600 | 16,822.51 | 1.5404301 | 1.6303156 | 1.7156441 | 1.8112541 | 1.9114163 | 1.9570159 | 1.9766426 |
| 1986 | 42,000 | 17,321.82 | 1.4960264 | 1.5833209 | 1.6661898 | 1.7590438 | 1.8563188 | 1.9006040 | 1.9196649 |
| 1987 | 43,800 | 18,426.51 | 1.4063379 | 1.4883991 | 1.5662999 | 1.6535871 | 1.7450304 | 1.7866606 | 1.8045788 |
| 1988 | 45,000 | 19,334.04 | 1.3403251 | 1.4185344 | 1.4927785 | 1.5759686 | 1.6631196 | 1.7027957 | 1.7198728 |
| 1989 | 48,000 | 20,099.55 | 1.2892776 | 1.3645082 | 1.4359247 | 1.5159464 | 1.5997781 | 1.6379431 | 1.6543699 |
| 1990 | 51,300 | 21,027.98 | 1.2323533 | 1.3042622 | 1.3725256 | 1.4490141 | 1.5291445 | 1.5656245 | 1.5813259 |
| 1991 | 53,400 | 21,811.60 | 1.1880788 | 1.2574043 | 1.3232152 | 1.3969557 | 1.4742073 | 1.5093767 | 1.5245140 |
| 1992 | 55,500 | 22,935.42 | 1.1298638 | 1.1957924 | 1.2583785 | 1.3285059 | 1.4019721 | 1.4354182 | 1.4498139 |
| 1993 | 57,600 | 23,132.67 | 1.1202295 | 1.1855960 | 1.2476485 | 1.3171778 | 1.3900177 | 1.4231786 | 1.4374514 |
| 1994 | 60,600 | 23,753.53 | 1.0909494 | 1.1546073 | 1.2150379 | 1.2827500 | 1.3536860 | 1.3859801 | 1.3998799 |
| 1995 | 61,200 | 24,705.66 | 1.0489054 | 1.1101100 | 1.1682117 | 1.2333141 | 1.3015163 | 1.3325659 | 1.3459300 |
| 1996 | 62,700 | 25,913.90 | 1.0000000 | 1.0583509 | 1.1137436 | 1.1758107 | 1.2408329 | 1.2704348 | 1.2831758 |
| 1997 | 65,400 | 27,426.00 | 1.0000000 | 1.0000000 | 1.0523387 | 1.1109837 | 1.1724211 | 1.2003909 | 1.2124294 |
| 1998 | 68,400 | 28,861.44 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0557283 | 1.1141100 | 1.1406888 | 1.1521286 |
| 1999 | 72,600 | 30,469.84 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0552999 | 1.0804756 | 1.0913116 |

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A8—Factors for indexing earnings, 1951–2004—Continued

| Year | Annual maximum taxable earnings (dollars) | Average annual wage ^a (dollars) | Factors for workers who were first eligible (attained age 62, became disabled, or died) in ^b — | | | | | | |
|------|---|--|---|-----------|-----------|-----------|-----------|-----------|-----------|
| | | | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 2000 | 76,200 | 32,154.82 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0238565 | 1.0341246 |
| 2001 | 80,400 | 32,921.92 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0100289 |
| 2002 | 84,900 | 33,252.09 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 |
| 2003 | 87,000 | ... | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 |
| 2004 | 87,900 | ... | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 | 1.0000000 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

NOTE: ... = not available.

- a. National average wage levels. For years before 1978, average wages were determined from wages earned during the first quarter of the year and reported to the Social Security Administration (SSA) for Social Security tax purposes. These wages were then multiplied by 4 to obtain the average wage for the year. For 1973–1977, from data collected on all taxable wages reported to SSA; for 1957–1972, based on 1 percent statistical sample; for 1951–1956, based on 1/10 of 1 percent statistical sample. For 1978–1984, from wage data collected by the Internal Revenue Service during processing of annual tax returns. For years after 1984, from W-2 data processed by SSA. For years after 1977, the average wage amounts have been adjusted to be consistent with the pre-1978 series.
- b. The indexing factor for a given year represents the ratio of the average annual wage for the second year before the year of first eligibility to the average annual wage for the year to be indexed. Multiplying a worker's covered earnings, up to the maximum taxable amounts for various years after 1951, by the indicated factors gives the indexed earnings. Earnings in the year before the year of first eligibility, and any earnings thereafter, are not indexed. The actual taxable earnings for those years are considered in calculating the average indexed monthly earnings (AIME).

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A9—Indexed earnings for workers with maximum earnings, 1951–2004 (in dollars)

| Year | Annual maximum taxable earnings | Average annual wage ^a | Annual maximum indexed earnings for workers who were first eligible (attained age 62, became disabled, or died) in ^b — | | | | | | | |
|------|---------------------------------|----------------------------------|---|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| | | | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| 1951 | 3,600 | 2,799.16 | 31,773.95 | 33,327.87 | 35,272.58 | 37,118.70 | 39,187.26 | 41,354.32 | 42,340.89 | 42,765.52 |
| 1952 | 3,600 | 2,973.32 | 29,912.82 | 31,375.71 | 33,206.52 | 34,944.50 | 36,891.90 | 38,932.02 | 39,860.80 | 40,260.56 |
| 1953 | 3,600 | 3,139.44 | 28,330.01 | 29,715.50 | 31,449.43 | 33,095.45 | 34,939.81 | 36,871.97 | 37,751.61 | 38,130.22 |
| 1954 | 3,600 | 3,155.64 | 28,184.58 | 29,562.95 | 31,287.98 | 32,925.55 | 34,760.44 | 36,682.69 | 37,557.81 | 37,934.47 |
| 1955 | 4,200 | 3,301.44 | 31,429.85 | 32,966.94 | 34,890.59 | 36,716.72 | 38,762.88 | 40,906.47 | 41,882.35 | 42,302.38 |
| 1956 | 4,200 | 3,532.36 | 29,375.20 | 30,811.80 | 32,609.70 | 34,316.45 | 36,228.85 | 38,232.30 | 39,144.39 | 39,536.96 |
| 1957 | 4,200 | 3,641.72 | 28,493.07 | 29,886.53 | 31,630.44 | 33,285.93 | 35,140.90 | 37,084.19 | 37,968.89 | 38,349.67 |
| 1958 | 4,200 | 3,673.80 | 28,244.26 | 29,625.56 | 31,354.24 | 32,995.28 | 34,834.05 | 36,760.37 | 37,637.34 | 38,014.80 |
| 1959 | 4,800 | 3,855.80 | 30,755.53 | 32,259.64 | 34,142.02 | 35,928.97 | 37,931.23 | 40,028.82 | 40,983.77 | 41,394.79 |
| 1960 | 4,800 | 4,007.12 | 29,594.11 | 31,041.43 | 32,852.72 | 34,572.19 | 36,498.84 | 38,517.22 | 39,436.11 | 39,831.61 |
| 1961 | 4,800 | 4,086.76 | 29,017.40 | 30,436.51 | 32,212.51 | 33,898.47 | 35,787.58 | 37,766.63 | 38,667.60 | 39,055.40 |
| 1962 | 4,800 | 4,291.40 | 27,633.68 | 28,985.11 | 30,676.42 | 32,281.99 | 34,081.01 | 35,965.68 | 36,823.70 | 37,193.00 |
| 1963 | 4,800 | 4,396.64 | 26,972.23 | 28,291.31 | 29,942.14 | 31,509.27 | 33,265.23 | 35,104.79 | 35,942.27 | 36,302.73 |
| 1964 | 4,800 | 4,576.32 | 25,913.22 | 27,180.51 | 28,766.52 | 30,272.12 | 31,959.14 | 33,726.47 | 34,531.07 | 34,877.38 |
| 1965 | 4,800 | 4,658.72 | 25,454.88 | 26,699.76 | 28,257.72 | 29,736.69 | 31,393.87 | 33,129.94 | 33,920.31 | 34,260.49 |
| 1966 | 6,600 | 4,938.36 | 33,018.52 | 34,633.31 | 36,654.19 | 38,572.62 | 40,722.21 | 42,974.15 | 43,999.36 | 44,440.62 |
| 1967 | 6,600 | 5,213.44 | 31,276.35 | 32,805.93 | 34,720.18 | 36,537.39 | 38,573.56 | 40,706.68 | 41,677.79 | 42,095.77 |
| 1968 | 7,800 | 5,571.76 | 34,585.87 | 36,277.30 | 38,394.12 | 40,403.61 | 42,655.24 | 45,014.07 | 46,087.95 | 46,550.16 |
| 1969 | 7,800 | 5,893.76 | 32,696.30 | 34,295.33 | 36,296.49 | 38,196.20 | 40,324.81 | 42,554.77 | 43,569.98 | 44,006.93 |
| 1970 | 7,800 | 6,186.24 | 31,150.45 | 32,673.87 | 34,580.42 | 36,390.32 | 38,418.29 | 40,542.82 | 41,510.02 | 41,926.32 |
| 1971 | 7,800 | 6,497.08 | 29,660.12 | 31,110.66 | 32,925.99 | 34,649.29 | 36,580.24 | 38,603.13 | 39,524.06 | 39,920.44 |
| 1972 | 9,000 | 7,133.80 | 31,168.65 | 32,692.97 | 34,600.63 | 36,411.58 | 38,440.74 | 40,566.51 | 41,534.28 | 41,950.83 |
| 1973 | 10,800 | 7,580.16 | 35,199.93 | 36,921.40 | 39,075.80 | 41,120.97 | 43,412.58 | 45,813.29 | 46,906.23 | 47,376.65 |
| 1974 | 13,200 | 8,030.76 | 40,608.20 | 42,594.16 | 45,079.57 | 47,438.97 | 50,082.67 | 52,852.24 | 54,113.10 | 54,655.80 |
| 1975 | 14,100 | 8,630.92 | 40,360.68 | 42,334.54 | 44,804.79 | 47,149.82 | 49,777.40 | 52,530.09 | 53,783.27 | 54,322.65 |
| 1976 | 15,300 | 9,226.48 | 40,968.67 | 42,972.26 | 45,479.73 | 47,860.08 | 50,527.24 | 53,321.39 | 54,593.45 | 55,140.96 |
| 1977 | 16,500 | 9,779.44 | 41,683.72 | 43,722.27 | 46,273.51 | 48,695.40 | 51,409.12 | 54,252.04 | 55,546.30 | 56,103.36 |
| 1978 | 17,700 | 10,556.03 | 41,425.63 | 43,451.57 | 45,987.00 | 48,393.90 | 51,090.81 | 53,916.13 | 55,202.38 | 55,756.00 |
| 1979 | 22,900 | 11,479.46 | 49,284.51 | 51,694.79 | 54,711.23 | 57,574.74 | 60,783.29 | 64,144.60 | 65,674.86 | 66,333.51 |
| 1980 | 25,900 | 12,513.46 | 51,135.07 | 53,635.85 | 56,765.55 | 59,736.58 | 63,065.60 | 66,553.12 | 68,140.84 | 68,824.22 |
| 1981 | 29,700 | 13,773.10 | 53,274.72 | 55,880.15 | 59,140.80 | 62,236.15 | 65,704.47 | 69,337.92 | 70,992.08 | 71,704.05 |
| 1982 | 32,400 | 14,531.34 | 55,085.31 | 57,779.28 | 61,150.75 | 64,351.30 | 67,937.49 | 71,694.43 | 73,404.81 | 74,140.98 |
| 1983 | 35,700 | 15,239.24 | 57,876.38 | 60,706.85 | 64,249.15 | 67,611.86 | 71,379.76 | 75,327.06 | 77,124.09 | 77,897.56 |
| 1984 | 37,800 | 16,135.07 | 57,878.52 | 60,709.09 | 64,251.52 | 67,614.36 | 71,382.40 | 75,329.84 | 77,126.94 | 77,900.44 |
| 1985 | 39,600 | 16,822.51 | 58,156.85 | 61,001.03 | 64,560.50 | 67,939.51 | 71,725.66 | 75,692.09 | 77,497.83 | 78,275.05 |
| 1986 | 42,000 | 17,321.82 | 59,903.50 | 62,833.11 | 66,499.48 | 69,979.97 | 73,879.84 | 77,965.39 | 79,825.37 | 80,625.93 |
| 1987 | 43,800 | 18,426.51 | 58,725.60 | 61,597.60 | 65,191.88 | 68,603.93 | 72,427.12 | 76,432.33 | 78,255.74 | 79,040.55 |
| 1988 | 45,000 | 19,334.04 | 57,502.45 | 60,314.63 | 63,834.05 | 67,175.03 | 70,918.59 | 74,840.38 | 76,625.81 | 77,394.28 |
| 1989 | 48,000 | 20,099.55 | 58,999.91 | 61,885.33 | 65,496.39 | 68,924.38 | 72,765.43 | 76,789.35 | 78,621.27 | 79,409.75 |
| 1990 | 51,300 | 21,027.98 | 60,272.09 | 63,219.72 | 66,908.65 | 70,410.56 | 74,334.42 | 78,445.11 | 80,316.54 | 81,122.02 |
| 1991 | 53,400 | 21,811.60 | 60,485.35 | 63,443.41 | 67,145.39 | 70,659.69 | 74,597.44 | 78,722.67 | 80,600.71 | 81,409.05 |
| 1992 | 55,500 | 22,935.42 | 59,783.69 | 62,707.44 | 66,366.48 | 69,840.01 | 73,732.08 | 77,809.45 | 79,665.71 | 80,464.67 |
| 1993 | 57,600 | 23,132.67 | 61,516.72 | 64,525.22 | 68,290.33 | 71,864.55 | 75,869.44 | 80,065.02 | 81,975.09 | 82,797.20 |
| 1994 | 60,600 | 23,753.53 | 63,029.07 | 66,111.54 | 69,969.20 | 73,631.30 | 77,734.65 | 82,033.37 | 83,990.39 | 84,832.72 |
| 1995 | 61,200 | 24,705.66 | 61,200.00 | 64,193.01 | 67,938.73 | 71,494.55 | 75,478.83 | 79,652.80 | 81,553.03 | 82,370.92 |
| 1996 | 62,700 | 25,913.90 | 62,700.00 | 62,700.00 | 66,358.60 | 69,831.72 | 73,723.33 | 77,800.22 | 79,656.26 | 80,455.12 |
| 1997 | 65,400 | 27,426.00 | 65,400.00 | 65,400.00 | 65,400.00 | 68,822.95 | 72,658.34 | 76,676.34 | 78,505.56 | 79,292.89 |
| 1998 | 68,400 | 28,861.44 | 68,400.00 | 68,400.00 | 68,400.00 | 68,400.00 | 72,211.82 | 76,205.13 | 78,023.11 | 78,805.60 |
| 1999 | 72,600 | 30,469.84 | 72,600.00 | 72,600.00 | 72,600.00 | 72,600.00 | 72,600.00 | 76,614.77 | 78,442.53 | 79,229.22 |

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A9—Indexed earnings for workers with maximum earnings, 1951–2004 (in dollars)—Continued

| Year | Annual maximum taxable earnings | Average annual wage ^a | Annual maximum indexed earnings for workers who were first eligible (attained age 62, became disabled, or died) in ^b — | | | | | | | | |
|------|---------------------------------|----------------------------------|---|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| | | | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | |
| 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 | 78,017.86 | 78,800.29 |
| 2001 | 80,400 | 32,921.92 | 80,400.00 | 80,400.00 | 80,400.00 | 80,400.00 | 80,400.00 | 80,400.00 | 80,400.00 | 80,400.00 | 81,206.32 |
| 2002 | 84,900 | 33,252.09 | 84,900.00 | 84,900.00 | 84,900.00 | 84,900.00 | 84,900.00 | 84,900.00 | 84,900.00 | 84,900.00 | 84,900.00 |
| 2003 | 87,000 | ... | 87,000.00 | 87,000.00 | 87,000.00 | 87,000.00 | 87,000.00 | 87,000.00 | 87,000.00 | 87,000.00 | 87,000.00 |
| 2004 | 87,900 | ... | 87,900.00 | 87,900.00 | 87,900.00 | 87,900.00 | 87,900.00 | 87,900.00 | 87,900.00 | 87,900.00 | 87,900.00 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

NOTE: ... = not available.

- a. National average wage levels. For years before 1978, average wages were determined from wages earned during the first quarter of the year and reported to the Social Security Administration (SSA) for Social Security tax purposes. These wages were then multiplied by 4 to obtain the average wage for the year. For 1973–1977, from data collected on all taxable wages reported to SSA; for 1957–1972, based on 1 percent statistical sample; for 1951–1956, based on 1/10 of 1 percent statistical sample. For 1978–1984, from wage data collected by the Internal Revenue Service during processing of annual tax returns. For years after 1984, from W-2 data processed by SSA. For years after 1977, the average wage amounts have been adjusted to be consistent with the pre-1978 series.
- b. A worker's earnings for each year after 1950 and through the second year before the year of first eligibility are indexed by multiplying covered earnings, up to the maximum taxable amounts, by specified indexing factors (see Table 2.A8). The indexing factor for a given year represents the ratio of the average annual wage for the second year before the year of first eligibility to the average annual wage for the year to be indexed. For example, if the year of first eligibility is 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.

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A10—Average monthly wage and average indexed monthly earnings provisions, by year enacted

| Year enacted | Provision |
|--------------|---|
| | <i>Average monthly wage (AMW)</i> |
| 1939 | Computed using creditable earnings after 1936 and before year of death or retirement, divided by months after 1936 and before quarter of death or retirement, excluding months before age 22 in quarters not covered. |
| 1950 | Alternatively, computed using creditable earnings after 1950 (or year aged 21, if later) and before year of death, year of retirement, or subsequent year (or year age 65 attained if then insured), divided by number of months in those years. |
| 1954 | Earnings and months in 4 years may be excluded in all cases; 5 years if worker has 20 quarters of coverage. Period of disability may be excluded. |
| 1956 | Earnings and months in 5 years may be excluded in all cases. Computation period may end at age 62 for women then insured. |
| 1960 | Earnings may be used for any year after 1950 and before year of retirement but including year of death, with the number of years equal to the years elapsed after 1955 (or year age 26 attained) and before year of death or age 65 attained (62 for women). Same method may be used for earnings after 1936 and years elapsed after 1941. |
| 1972 | Number of years for men reaching age 62 after 1972, measured to age 62 or to 1975, if later. |
| 1977 | For workers who attain age 62, become disabled, or die after 1978, excludes earnings in year of attainment of age 62 and later, computed using creditable earnings after 1936. For workers who attain age 62 after 1978 and before 1984, excludes earnings in year of attainment of age 62 and later, computed using creditable earnings after 1950. |
| | <i>Average indexed monthly earnings (AIME)</i> |
| 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, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

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

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A11—Formulas for computing PIA from AIME, cost-of-living adjustments, and minimum PIA for workers who were first eligible in 1979 or later, by year of first eligibility

| Eligibility year | Calculation of PIA (based on percentage of AIME) ^a (dollars) | | | First applicable cost-of-living adjustment | | Minimum PIA based on indexed earnings (dollars) |
|------------------------------------|---|-----------------------------|-------------------------------------|--|---------------------|---|
| | 90 percent of the first | Plus 32 percent of the next | Plus 15 percent of the amount above | Effective date | Percentage increase | |
| Enacted in 1977^b | | | | | | |
| 1979 | 180 | 905 | 1,085 | June 1979 | 9.9 | ^c 122 |
| 1980 | 194 | 977 | 1,171 | June 1980 | 14.3 | ^c 122 |
| Enacted in 1981 | | | | | | |
| 1981 | 211 | 1,063 | 1,274 | June 1981 | 11.2 | ^c 122 |
| 1982 | 230 | 1,158 | 1,388 | June 1982 | 7.4 | ^d |
| Enacted in 1983 | | | | | | |
| 1983 | 254 | 1,274 | 1,528 | December 1983 | 3.5 | ^d |
| 1984 | 267 | 1,345 | 1,612 | December 1984 | 3.5 | ^d |
| 1985 | 280 | 1,411 | 1,691 | December 1985 | 3.1 | ^d |
| 1986 | 297 | 1,493 | 1,790 | December 1986 | 1.3 | ^d |
| 1987 | 310 | 1,556 | 1,866 | December 1987 | 4.2 | ^d |
| 1988 | 319 | 1,603 | 1,922 | December 1988 | 4.0 | ^d |
| 1989 | 339 | 1,705 | 2,044 | December 1989 | 4.7 | ^d |
| 1990 | 356 | 1,789 | 2,145 | December 1990 | 5.4 | ^d |
| 1991 | 370 | 1,860 | 2,230 | December 1991 | 3.7 | ^d |
| 1992 | 387 | 1,946 | 2,333 | December 1992 | 3.0 | ^d |
| 1993 | 401 | 2,019 | 2,420 | December 1993 | 2.6 | ^d |
| 1994 | 422 | 2,123 | 2,545 | December 1994 | 2.8 | ^d |
| 1995 | 426 | 2,141 | 2,567 | December 1995 | 2.6 | ^d |
| 1996 | 437 | 2,198 | 2,635 | December 1996 | 2.9 | ^d |
| 1997 | 455 | 2,286 | 2,741 | December 1997 | 2.1 | ^d |
| 1998 | 477 | 2,398 | 2,875 | December 1998 | 1.3 | ^d |
| 1999 | 505 | 2,538 | 3,043 | December 1999 | ^e 2.5 | ^d |
| 2000 | 531 | 2,671 | 3,202 | December 2000 | 3.5 | ^d |
| 2001 | 561 | 2,820 | 3,381 | December 2001 | 2.6 | ^d |
| 2002 | 592 | 2,975 | 3,567 | December 2002 | 1.4 | ^d |
| 2003 | 606 | 3,047 | 3,653 | December 2003 | 2.1 | ^d |
| 2004 | 612 | 3,077 | 3,689 | December 2004 | ... | ^d |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

NOTES: Eligible workers are those who attained age 62, became disabled, or died in the given year.

AIME = average indexed monthly earnings; AMW = average monthly wage; PIA = primary insurance amount; ... = not available.

- For workers who attained age 62 in the 1979–1983 period, the PIA cannot be less than that derived from the PIA table in effect in December 1978 (approximated by the PIA formula in Table 2.A16) on the basis of provisions in effect before 1979 but excluding earnings after year aged 61 in computations of AMW and including any general benefit increase after year aged 61.
- The amendments in 1977 provided for annual automatic adjustments of bend points (AIME brackets) in benefit formula in proportion to increases in average wage level. As a result, separate formulas are applicable to workers who were first eligible in successive calendar years. The legislation also froze the minimum PIA at \$122.
- Not subject to automatic adjustments until earlier of year of attainment of age 65 or year of first receipt of benefits.
- In 1981, legislation eliminated the minimum PIA for workers who attain age 62 or die after 1981 (after 1991 for members of certain religious orders). In August 1981, legislation would have eliminated the minimum PIA effective March 1982 for workers who attained age 62 before November 1981 or who died (before attaining age 62) before March 1982; for all others, the minimum would have been eliminated effective November 1981. This legislation was superseded in December 1981 by legislation that restored the minimum PIA for workers who attained age 62 or died (before attaining age 62) before 1982.
- The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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

2.A OASDI: Benefit Computation and Automatic Adjustments

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

| Year effective | Provision | | | | | | | | | | | | | | | | | | | | |
|--------------------------|---|--------------------------|-------------------------|------|----|------|----|------|----|------|----|----------------|----|----|----|----|----|----|----|----|----|
| | Enacted in 1983 | | | | | | | | | | | | | | | | | | | | |
| 1986 | Workers first eligible for pensions based on noncovered employment and disability or retired workers after December 31, 1985. ^a The benefit computation formula uses a reduced factor of the usual first AIME bend point. | | | | | | | | | | | | | | | | | | | | |
| | <table style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: left;"><i>Year eligible</i></th> <th style="text-align: left;"><i>Factor (percent)</i></th> </tr> </thead> <tbody> <tr><td>1986</td><td>80</td></tr> <tr><td>1987</td><td>70</td></tr> <tr><td>1988</td><td>60</td></tr> <tr><td>1989</td><td>50</td></tr> <tr><td>1990 and later</td><td>40</td></tr> </tbody> </table> | <i>Year eligible</i> | <i>Factor (percent)</i> | 1986 | 80 | 1987 | 70 | 1988 | 60 | 1989 | 50 | 1990 and later | 40 | | | | | | | | |
| <i>Year eligible</i> | <i>Factor (percent)</i> | | | | | | | | | | | | | | | | | | | | |
| 1986 | 80 | | | | | | | | | | | | | | | | | | | | |
| 1987 | 70 | | | | | | | | | | | | | | | | | | | | |
| 1988 | 60 | | | | | | | | | | | | | | | | | | | | |
| 1989 | 50 | | | | | | | | | | | | | | | | | | | | |
| 1990 and later | 40 | | | | | | | | | | | | | | | | | | | | |
| | WEP is not applicable to persons who were federal employees or nonprofit employees on January 1, 1984, and who were covered by Social Security on that date with no Civil Service Retirement System coverage; to persons with Railroad Retirement pensions; or to workers with 30 years of substantial Social Security earnings. Workers with 26–29 years of coverage have less than full WEP applied. ^b For benefits payable before January 1989: | | | | | | | | | | | | | | | | | | | | |
| | <table style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: left;"><i>Years of coverage</i></th> <th style="text-align: left;"><i>Factor (percent)</i></th> </tr> </thead> <tbody> <tr><td>26</td><td>50</td></tr> <tr><td>27</td><td>60</td></tr> <tr><td>28</td><td>70</td></tr> <tr><td>29</td><td>80</td></tr> </tbody> </table> | <i>Years of coverage</i> | <i>Factor (percent)</i> | 26 | 50 | 27 | 60 | 28 | 70 | 29 | 80 | | | | | | | | | | |
| <i>Years of coverage</i> | <i>Factor (percent)</i> | | | | | | | | | | | | | | | | | | | | |
| 26 | 50 | | | | | | | | | | | | | | | | | | | | |
| 27 | 60 | | | | | | | | | | | | | | | | | | | | |
| 28 | 70 | | | | | | | | | | | | | | | | | | | | |
| 29 | 80 | | | | | | | | | | | | | | | | | | | | |
| | Enacted in 1988 | | | | | | | | | | | | | | | | | | | | |
| 1989 | 5 percent added to factor for each year of coverage over 20. | | | | | | | | | | | | | | | | | | | | |
| | <table style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: left;"><i>Years of coverage</i></th> <th style="text-align: left;"><i>Factor (percent)</i></th> </tr> </thead> <tbody> <tr><td>21</td><td>45</td></tr> <tr><td>22</td><td>50</td></tr> <tr><td>23</td><td>55</td></tr> <tr><td>24</td><td>60</td></tr> <tr><td>25</td><td>65</td></tr> <tr><td>26</td><td>70</td></tr> <tr><td>27</td><td>75</td></tr> <tr><td>28</td><td>80</td></tr> <tr><td>29</td><td>85</td></tr> </tbody> </table> | <i>Years of coverage</i> | <i>Factor (percent)</i> | 21 | 45 | 22 | 50 | 23 | 55 | 24 | 60 | 25 | 65 | 26 | 70 | 27 | 75 | 28 | 80 | 29 | 85 |
| <i>Years of coverage</i> | <i>Factor (percent)</i> | | | | | | | | | | | | | | | | | | | | |
| 21 | 45 | | | | | | | | | | | | | | | | | | | | |
| 22 | 50 | | | | | | | | | | | | | | | | | | | | |
| 23 | 55 | | | | | | | | | | | | | | | | | | | | |
| 24 | 60 | | | | | | | | | | | | | | | | | | | | |
| 25 | 65 | | | | | | | | | | | | | | | | | | | | |
| 26 | 70 | | | | | | | | | | | | | | | | | | | | |
| 27 | 75 | | | | | | | | | | | | | | | | | | | | |
| 28 | 80 | | | | | | | | | | | | | | | | | | | | |
| 29 | 85 | | | | | | | | | | | | | | | | | | | | |

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A11.1—Computation of PIA based on Windfall Elimination Provision (WEP), by year enacted—Continued

| Year effective | Provision |
|----------------|--|
| | <i>Enacted in 1988 (cont.)</i> |
| 1991 | Earnings required for a year of substantial coverage (decoupled from the definition of a year of coverage for special minimum PIA). ^b |
| | <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 |
| | 2003 16,125 |
| | 2004 16,275 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

- 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 base, while the criterion for computing the special minimum PIA was changed to 15 percent of the base.

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

2.A OASDI: Benefit Computation and Automatic Adjustments

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

| Year enacted | Number of years of coverage | PIA computation | | |
|-------------------|---|-------------------------|--|---|
| 1972 | For 1937–1950, the number (disregarding any remainder and not exceeding 14) obtained by dividing total creditable wages in 1937–1950 by \$900 | | | <i>Maximum amount^a for workers with 30 or more years of coverage (dollars)</i> |
| | After 1950, the number of years with creditable earnings equal to at least 25 percent of the effective annual maximum taxable earnings, that is: | <i>Effective date</i> | <i>Amount^a per year of coverage over 10 years (dollars)</i> | |
| | <i>Year</i> | <i>Amount (dollars)</i> | | |
| | | January 1973 | 8.50 | 170.00 |
| | 1951–1954 | 900 | | |
| | 1955–1958 | 1,050 | | |
| | 1959–1965 | 1,200 | | |
| | 1966–1967 | 1,650 | | |
| | 1968–1971 | 1,950 | | |
| | 1972 | 2,250 | | |
| | 1973 | 2,700 | | |
| | 1974 | 3,300 | | |
| | 1975 | 3,525 | | |
| | 1976 | 3,825 | | |
| | 1977 | 4,125 | | |
| | 1978 | 4,425 | | |
| 1973 | ... | | | <i>Maximum amount^a for workers with 30 or more years of coverage (dollars)</i> |
| | | <i>Effective date</i> | <i>Amount^a per year of coverage over 10 years (dollars)</i> | |
| | | March 1974 | 9.00 | 180.00 |
| 1977 ^b | After 1978, the number of years with creditable earnings equal to at least 25 percent of what the annual taxable maximum would have been if the statutory increases in the maximum under the 1977 amendments had not been enacted (the "old law" contribution and benefit base), that is: | <i>Effective date</i> | <i>Amount^a per year of coverage over 10 years (dollars)</i> | <i>Maximum amount^a for workers with 30 or more years of coverage (dollars)</i> |
| | <i>Year</i> | <i>Amount (dollars)</i> | | |
| | | January 1979 | 11.50 | 230.00 |
| | 1979 | 4,725 | ^c 12.64 | 252.80 |
| | 1980 | 5,100 | ^c 14.45 | 289.00 |
| | 1981 | 5,550 | ^c 16.07 | 321.40 |
| | 1982 | 6,075 | ^c 17.26 | 345.10 |
| | 1983 | 6,675 | ^c 17.86 | 357.10 |
| | 1984 | 7,050 | ^c 18.49 | 369.50 |
| | 1985 | 7,425 | ^c 19.06 | 380.90 |
| | 1986 | 7,875 | ^c 19.31 | 385.80 |
| | 1987 | 8,175 | ^c 20.12 | 402.00 |
| | 1988 | 8,400 | ^c 20.92 | 418.00 |
| | 1989 | 8,925 | ^c 21.90 | 437.60 |
| | 1990 | 9,525 | ^c 23.08 | 461.20 |
| | | December 1991 | ^c 23.93 | 478.20 |
| | | December 1992 | ^c 24.65 | 492.50 |
| | | December 1993 | ^c 25.29 | 505.30 |
| | | December 1994 | ^c 26.00 | 519.40 |
| | | December 1995 | ^c 26.68 | 532.90 |
| | | December 1996 | ^c 27.45 | 548.30 |
| | | December 1997 | ^c 28.03 | 559.80 |
| | | December 1998 | ^c 28.39 | 567.00 |
| | | December 1999 | ^{c,d} 29.10 | ^d 581.10 |
| | | December 2000 | ^c 30.12 | 601.40 |
| | | December 2001 | ^c 30.90 | 617.00 |
| | | December 2002 | ^c 31.33 | 625.60 |
| | | December 2003 | ^c 31.99 | 638.70 |

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

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

| Year enacted | Number of years of coverage | PIA computation |
|--------------|--|-------------------------|
| 1990 | After 1990, the number of years with creditable earnings equal to at least 15 percent of what the annual taxable maximum would have been if the statutory increases in the maximum under the 1977 amendments had not been enacted (the "old law" contribution and benefit base), that is: ^e | ... |
| | <i>Year</i> | <i>Amount (dollars)</i> |
| | 1991 | 5,940 |
| | 1992 | 6,210 |
| | 1993 | 6,435 |
| | 1994 | 6,750 |
| | 1995 | 6,795 |
| | 1996 | 6,975 |
| | 1997 | 7,290 |
| | 1998 | 7,605 |
| | 1999 | 8,055 |
| | 2000 | 8,505 |
| | 2001 | 8,955 |
| | 2002 | 9,450 |
| | 2003 | 9,675 |
| | 2004 | 9,765 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

NOTES: Alternative PIA applicable when it exceeds the regularly computed PIA. The usual rates of actuarial reduction apply for retirement before the full retirement age. No delayed retirement credits are applicable to the benefit derived from the special minimum PIA. However, the resulting retirement benefit will be raised if necessary to equal the benefit derived from the regularly computed PIA plus any delayed retirement credits.

... = not applicable.

- The amount effective for a given month applies, as of that month, to all workers from the date of entitlement to benefits.
- Provision for future automatic cost-of-living increases of amount per year of coverage (and maximum amount), beginning with the June 1979 increase.
- Factors were obtained by applying cost-of-living increases to initial 1979 factor of \$11.50 and rounding each one to nearest cent. An approximate PIA may be computed by multiplying factor in year of entitlement by the number of years of coverage in excess of 10 with a maximum of 20. Actual PIAs are published yearly in the *Federal Register*.
- The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.
- For 1991 and following, a year of substantial coverage under the Windfall Elimination Provision remains 25 percent of the old law base, while the criterion for the special minimum PIA was changed to 15 percent of the base.

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

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A13—Formulas enacted in 1977 for computing maximum family benefit from PIA and cost-of-living adjustments for workers who were first eligible in 1979 or later, by year of first eligibility

| Eligibility year | Calculation of maximum family benefit (based on percentage of PIA) (dollars) | | | | First applicable cost-of-living adjustment | |
|------------------|--|------------------------------|------------------------------|--------------------------------------|--|---------------------|
| | 150 percent of the first | Plus 272 percent of the next | Plus 134 percent of the next | Plus 175 percent of the amount above | Effective date | Percentage increase |
| 1979 | 230 | 102 | 101 | 433 | June 1979 | 9.9 |
| 1980 | 248 | 110 | 109 | 467 | June 1980 | 14.3 |
| 1981 | 270 | 120 | 118 | 508 | June 1981 | 11.2 |
| 1982 | 294 | 131 | 129 | 554 | June 1982 | 7.4 |
| 1983 | 324 | 144 | 142 | 610 | December 1983 | 3.5 |
| 1984 | 342 | 151 | 150 | 643 | December 1984 | 3.5 |
| 1985 | 358 | 159 | 158 | 675 | December 1985 | 3.1 |
| 1986 | 379 | 169 | 166 | 714 | December 1986 | 1.3 |
| 1987 | 396 | 175 | 174 | 745 | December 1987 | 4.2 |
| 1988 | 407 | 181 | 179 | 767 | December 1988 | 4.0 |
| 1989 | 433 | 193 | 190 | 816 | December 1989 | 4.7 |
| 1990 | 455 | 201 | 200 | 856 | December 1990 | 5.4 |
| 1991 | 473 | 209 | 208 | 890 | December 1991 | 3.7 |
| 1992 | 495 | 219 | 217 | 931 | December 1992 | 3.0 |
| 1993 | 513 | 227 | 226 | 966 | December 1993 | 2.6 |
| 1994 | 539 | 240 | 237 | 1,016 | December 1994 | 2.8 |
| 1995 | 544 | 241 | 239 | 1,024 | December 1995 | 2.6 |
| 1996 | 559 | 247 | 246 | 1,052 | December 1996 | 2.9 |
| 1997 | 581 | 258 | 255 | 1,094 | December 1997 | 2.1 |
| 1998 | 609 | 271 | 267 | 1,147 | December 1998 | 1.3 |
| 1999 | 645 | 286 | 283 | 1,214 | December 1999 | ^a 2.5 |
| 2000 | 679 | 301 | 298 | 1,278 | December 2000 | 3.5 |
| 2001 | 717 | 317 | 315 | 1,349 | December 2001 | 2.6 |
| 2002 | 756 | 336 | 332 | 1,424 | December 2002 | 1.4 |
| 2003 | 774 | 344 | 340 | 1,458 | December 2003 | 2.1 |
| 2004 | 782 | 347 | 343 | 1,472 | December 2004 | ... |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

NOTES: The 1977 amendments provided for annual automatic adjustments of bend points (PIA brackets) in the maximum family benefit formula in proportion to increases in the average wage level. As a result, separate formulas are applicable to workers first eligible in successive calendar years.

Eligible workers are those who attained age 62 or died in the given year.

... = not available.

- a. The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A14—Formulas for computing maximum family benefit and cost-of-living adjustments for workers first eligible for disability benefits in 1979 or later, by year of enactment

| Eligibility year | Formula |
|------------------------------------|--|
| <i>Enacted in 1977^a</i> | |
| 1979 ^b | 150% of first \$230 of PIA + 272% of next \$102 of PIA + 134% of next \$101 of PIA + 175% of PIA over \$433 ^c |
| 1980 ^b | 150% of first \$248 of PIA + 272% of next \$110 of PIA + 134% of next \$109 of PIA + 175% of PIA over \$467 ^c |
| <i>Enacted in 1980^d</i> | |
| 1979 or later | Smaller of (1) 85% of the AIME (or 100% of PIA, if larger) and (2) 150% of PIA ^e |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

- 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).

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

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

| AMW (dollars) | April 1952 | September 1952 | September 1954 | January 1959 | January 1965 | February 1968 | January 1970 | January 1971 | September 1972 | June 1974 |
|----------------------------|--------------------|--------------------|--------------------|------------------|------------------|---------------|--------------|--------------|--------------------|--------------------|
| First 110 | ^a 50.00 | ^a 55.00 | 55.00 | 58.85 | 62.97 | 71.16 | 81.83 | 90.01 | 108.01 | 119.89 |
| Next 290 | ^b 15.00 | ^b 15.00 | ^c 20.00 | 21.40 | 22.90 | 25.88 | 29.76 | 32.74 | 39.29 | 43.61 |
| Next 150 | ... | ... | ... | ... | 21.40 | 24.18 | 27.81 | 30.59 | 36.71 | 40.75 |
| Next 100 | ... | ... | ... | ... | ... | 28.43 | 32.69 | 35.96 | 43.15 | 47.90 |
| Next 100 | ... | ... | ... | ... | ... | ... | ... | 20.00 | 24.00 | 26.64 |
| Next 250 | ... | ... | ... | ... | ... | ... | ... | ... | ^d 20.00 | 22.20 |
| Next 175 | ... | ... | ... | ... | ... | ... | ... | ... | ... | ^e 20.00 |
| Percentage increase in PIA | ^f 77.0 | ^g 12.5 | ^h 13.0 | ⁱ 7.0 | ^j 7.0 | 13.0 | 15.0 | 10.0 | 20.0 | ^k 11.0 |

(Continued)

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

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

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

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

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

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

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

| AMW (dollars) | December 1995 | December 1996 | December 1997 | December 1998 | December 1999 | December 2000 | December 2001 | December 2002 | December 2003 |
|----------------------------|---------------|---------------|---------------|---------------|------------------|---------------|---------------|---------------|---------------|
| First 110 | 360.47 | 370.93 | 378.72 | 383.64 | 393.23 | 407.00 | 417.58 | 423.43 | 432.32 |
| Next 290 | 131.10 | 134.90 | 137.73 | 139.52 | 143.01 | 148.02 | 151.87 | 153.99 | 157.23 |
| Next 150 | 122.50 | 126.06 | 128.71 | 130.38 | 133.64 | 138.32 | 141.91 | 143.90 | 146.92 |
| Next 100 | 144.06 | 148.24 | 151.35 | 153.32 | 157.15 | 162.65 | 166.88 | 169.22 | 172.77 |
| Next 100 | 80.11 | 82.43 | 84.16 | 85.26 | 87.39 | 90.45 | 92.80 | 94.10 | 96.07 |
| Next 250 | 66.75 | 68.69 | 70.13 | 71.04 | 72.82 | 75.37 | 77.33 | 78.41 | 80.06 |
| Next 175 | 60.16 | 61.91 | 63.21 | 64.03 | 65.63 | 67.93 | 69.70 | 70.67 | 72.16 |
| Next 100 | 55.70 | 57.32 | 58.52 | 59.28 | 60.77 | 62.89 | 64.53 | 65.43 | 66.81 |
| Next 100 | 52.33 | 53.84 | 54.97 | 55.69 | 57.08 | 59.08 | 60.61 | 61.46 | 62.75 |
| Next 100 | 49.42 | 50.86 | 51.93 | 52.60 | 53.92 | 55.81 | 57.26 | 58.06 | 59.28 |
| Next 435 | 46.42 | 47.76 | 48.76 | 49.40 | 50.63 | 52.40 | 53.77 | 54.52 | 55.66 |
| Next 250 | 42.22 | 43.44 | 44.35 | 44.93 | 46.05 | 47.66 | 48.90 | 49.59 | 50.63 |
| Next 315 | 36.94 | 38.01 | 38.81 | 39.31 | 40.30 | 41.71 | 42.79 | 43.39 | 44.30 |
| Next 225 | 33.20 | 34.16 | 34.88 | 35.33 | 36.21 | 37.48 | 38.46 | 38.99 | 39.81 |
| Next 275 | 30.91 | 31.81 | 32.48 | 32.90 | 33.72 | 34.90 | 35.81 | 36.31 | 37.07 |
| Next 175 | 29.88 | 30.74 | 31.39 | 31.79 | 32.59 | 33.73 | 34.61 | 35.09 | 35.83 |
| Next 150 | 28.88 | 29.72 | 30.34 | 30.74 | 31.51 | 32.61 | 33.46 | 33.93 | 34.64 |
| Next 200 | 27.99 | 28.80 | 29.40 | 29.79 | 30.53 | 31.60 | 32.42 | 32.88 | 33.57 |
| Next 150 | 27.64 | 28.44 | 29.04 | 29.41 | 30.15 | 31.21 | 32.02 | 32.46 | 33.15 |
| Next 100 | 26.53 | 27.30 | 27.87 | 28.24 | 28.94 | 29.95 | 30.73 | 31.16 | 31.82 |
| Next 250 | 25.52 | 26.26 | 26.81 | 27.16 | 27.84 | 28.81 | 29.56 | 29.98 | 30.61 |
| Next 275 | 24.38 | 25.08 | 25.61 | 25.94 | 26.59 | 27.52 | 28.23 | 28.63 | 29.23 |
| Next 175 | 23.12 | 23.79 | 24.29 | 24.61 | 25.22 | 26.10 | 26.78 | 27.16 | 27.73 |
| Next 175 | 22.29 | 22.94 | 23.42 | 23.73 | 24.32 | 25.17 | 25.82 | 26.19 | 26.74 |
| Next 175 | 21.64 | 22.27 | 22.74 | 23.03 | 23.61 | 24.44 | 25.07 | 25.42 | 25.96 |
| Next 250 | 21.09 | 21.71 | 22.17 | 22.45 | 23.02 | 23.82 | 24.44 | 24.78 | 25.30 |
| Next 50 | 20.52 | 21.12 | 21.56 | 21.84 | 22.39 | 23.17 | 23.78 | 24.11 | 24.62 |
| Next 125 | 20.00 | 20.58 | 21.01 | 21.29 | 21.82 | 22.58 | 23.17 | 23.49 | 23.99 |
| Next 225 | ... | 20.00 | 20.42 | 20.69 | 21.20 | 21.94 | 22.52 | 22.83 | 23.31 |
| Next 250 | ... | ... | 20.00 | 20.26 | 20.77 | 21.49 | 22.05 | 22.36 | 22.83 |
| Next 350 | ... | ... | ... | 20.00 | 20.50 | 21.22 | 21.77 | 22.07 | 22.54 |
| Next 300 | ... | ... | ... | ... | 20.00 | 20.70 | 21.24 | 21.54 | 21.99 |
| Next 350 | ... | ... | ... | ... | ... | 20.00 | 20.52 | 20.81 | 21.24 |
| Next 375 | ... | ... | ... | ... | ... | ... | 20.00 | 20.28 | 20.71 |
| Next 175 | ... | ... | ... | ... | ... | ... | ... | 20.00 | 20.42 |
| Next 75 | ... | ... | ... | ... | ... | ... | ... | ... | 20.00 |
| Percentage increase in PIA | 2.6 | 2.9 | 2.1 | 1.3 | ^m 2.5 | 3.5 | 2.6 | 1.4 | 2.1 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

NOTE: ... = not applicable.

- a. Applied to first \$100 of AMW.
- b. Applied to next \$200 of AMW.
- c. Applied to next \$190 before 1955 and to next \$240 effective for January 1955.
- d. Applied to next \$150 effective for January 1973 and to next \$350 effective for January 1974.
- e. Applied to next \$100 before January 1975.
- f. Average increase in benefits of about 77 percent—from 100 percent at the lowest level to 50 percent at the highest level.
- g. Increase of 12.5 percent or \$5, if larger.
- h. Average increase of about 13 percent, with minimum increase of \$5.
- i. Increase of 7 percent or \$3, if larger.
- j. Increase of 7 percent or \$4, if larger.
- k. Increase effective in two steps: 7 percent for March–May and 4 percent for June.
- l. Beginning June 1975, all benefit increases are based on automatic cost-of-living adjustments.
- m. The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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

2.A OASDI: Benefit Computation and Automatic Adjustments

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

| Year enacted | Effective date | Minimum PIA ^a (dollars) | Maximum family benefit | |
|-------------------|----------------|---------------------------------------|---|------------------------------|
| | | | Percentage of AMW | Not less than— |
| 1935 | ... | 10.00 | ... | ... |
| 1939 | ... | ... | Lesser of 80%, \$85, or 200% of PIA | \$20.00 |
| 1950 | September 1950 | 20.00 | 80% of first \$187.50 | \$40.00 |
| 1952 | September 1952 | 25.00 | 80% of first \$210.93 | \$45.00 |
| 1954 | September 1954 | 30.00 | 80% of first \$250 | \$50.00 or 150% of PIA |
| 1958 | January 1959 | 33.00 | 80% of first \$317.50 | \$20.00 + PIA or 150% of PIA |
| 1961 | August 1961 | 40.00 | 80% of first \$317.50 | 150% of PIA |
| 1965 | January 1965 | 44.00 | 80% of first \$370 + 40% of next \$180 | 150% of PIA |
| 1967 | February 1968 | 55.00 | 80% of first \$436 + 40% of next \$214 | 150% of PIA |
| 1969 | January 1970 | 64.00 | 80% of first \$436 + 40% of next \$180 | 150% of PIA |
| 1971 | January 1971 | 70.40 | 88% of first \$436 + 44% of next \$191 ^b | 150% of PIA |
| 1972 | September 1972 | 84.50 | 105.6% of first \$436 + 52.8% of next \$191 ^b | 150% of PIA |
| 1973 ^c | June 1974 | 89.50 | 111.8% of first \$436 + 55.9% of next \$191 ^b | 150% of PIA |
| 1973 ^d | March 1974 | 90.50 | 113.0% of first \$436 + 56.5% of next \$191 ^b | 150% of PIA |
| | June 1974 | 93.80 | 117.2% of first \$436 + 58.6% of next \$191 ^b | 150% of PIA |
| | June 1975 | 101.40 | 126.6% of first \$436 + 63.3% of next \$191 ^b | 150% of PIA |
| | June 1976 | 107.90 | 134.7% of first \$436 + 67.3% of next \$191 ^b | 150% of PIA |
| | June 1977 | 114.30 | 142.6% of first \$436 + 71.3% of next \$191 ^b | 150% of PIA |
| | June 1978 | 121.80 | 151.9% of first \$436 + 76.0% of next \$191 ^b | 150% of PIA |
| | June 1979 | 133.90 | 167.0% of first \$436 + 83.5% of next \$191 ^b | 150% of PIA |
| | June 1980 | 153.10 | 190.9% of first \$436 + 95.4% of next \$191 ^b | 150% of PIA |
| | June 1981 | 170.30 | 212.2% of first \$436 + 106.1% of next \$191 ^b | 150% of PIA |

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

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

| Year enacted | Effective date | Minimum PIA ^a (dollars) | Maximum family benefit | |
|-------------------|----------------------------|---------------------------------------|---|----------------|
| | | | Percentage of AMW | Not less than— |
| 1981 ^e | March 1982 | f | 190.9% of first \$436 + 106.1% of next \$191 ^b | 150% of PIA |
| 1981 | June 1982 | 182.90 | 227.9% of first \$436 + 114.0% of next \$191 ^b | 150% of PIA |
| | December 1983 | 189.30 | 235.9% of first \$436 + 118.0% of next \$191 ^b | 150% of PIA |
| | December 1984 | 195.90 | 244.2% of first \$436 + 122.1% of next \$191 ^b | 150% of PIA |
| | December 1985 | 201.90 | 251.8% of first \$436 + 125.9% of next \$191 ^b | 150% of PIA |
| | December 1986 | 204.50 | 255.1% of first \$436 + 127.5% of next \$191 ^b | 150% of PIA |
| | December 1987 | 213.00 | 265.8% of first \$436 + 132.9% of next \$191 ^b | 150% of PIA |
| | December 1988 | 221.50 | 276.4% of first \$436 + 138.2% of next \$191 ^b | 150% of PIA |
| | December 1989 | 231.90 | 289.4% of first \$436 + 144.7% of next \$191 ^b | 150% of PIA |
| | December 1990 | 244.40 | 305.0% of first \$436 + 152.5% of next \$191 ^b | 150% of PIA |
| | December 1991 | 253.40 | 316.3% of first \$436 + 158.1% of next \$191 ^b | 150% of PIA |
| | December 1992 | 261.00 | 325.8% of first \$436 + 162.8% of next \$191 ^b | 150% of PIA |
| | December 1993 | 267.70 | 334.3% of first \$436 + 167.0% of next \$191 ^b | 150% of PIA |
| | December 1994 | 275.10 | 343.7% of first \$436 + 171.7% of next \$191 ^b | 150% of PIA |
| | December 1995 | 282.20 | 352.6% of first \$436 + 176.2% of next \$191 ^b | 150% of PIA |
| | December 1996 | 290.30 | 362.8% of first \$436 + 181.3% of next \$191 ^b | 150% of PIA |
| | December 1997 | 296.30 | 370.4% of first \$436 + 185.1% of next \$191 ^b | 150% of PIA |
| | December 1998 | 300.10 | 375.2% of first \$436 + 187.5% of next \$191 ^b | 150% of PIA |
| | December 1999 ^g | 307.60 | 384.6% of first \$436 + 192.2% of next \$191 ^b | 150% of PIA |
| | December 2000 | 318.30 | 398.1% of first \$436 + 198.9% of next \$191 ^b | 150% of PIA |
| | December 2001 | 326.50 | 408.5% of first \$436 + 204.1% of next \$191 ^b | 150% of PIA |
| | December 2002 | 331.00 | 414.2% of first \$436 + 206.9% of next \$191 ^b | 150% of PIA |
| | December 2003 | 337.90 | 422.9% of first \$436 + 211.2% of next \$191 ^b | 150% of PIA |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

NOTE: AMW = average monthly wage; . . . = not applicable.

- a. Based on earnings; subject to reduction if claimed before age 65.
- b. For AMW of \$628 or more, 175 percent of PIA.
- c. Superseded by legislation in 1973.
- d. Beginning in 1975, minimum PIA and percentages in maximum family benefit formula are subject to automatic cost-of-living increases. (Superseded legislation in 1972 for automatic increases beginning in 1974.)
- e. Superseded by legislation in 1981 that restored the minimum PIA for these groups.
- f. Minimum PIA eliminated by legislation in 1981.
- g. The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A17.1—Full retirement age and maximum reduction of retired-worker benefits, by year of birth

| Year of birth ^a | Year of attainment of age 62 | Year of attainment of age 65 | Full retirement age | Maximum reduction months | Maximum reduction at age 62 ^b |
|----------------------------|------------------------------|------------------------------|------------------------|--------------------------|--|
| 1935 | 1997 | 2000 | 65 years | 36 | 0.2000000 |
| 1936 | 1998 | 2001 | 65 years | 36 | 0.2000000 |
| 1937 | 1999 | 2002 | 65 years | 36 | 0.2000000 |
| 1938 | 2000 | 2003 | 65 years and 2 months | 38 | 0.2083333 |
| 1939 | 2001 | 2004 | 65 years and 4 months | 40 | 0.2166667 |
| 1940 | 2002 | 2005 | 65 years and 6 months | 42 | 0.2250000 |
| 1941 | 2003 | 2006 | 65 years and 8 months | 44 | 0.2333333 |
| 1942 | 2004 | 2007 | 65 years and 10 months | 46 | 0.2416667 |
| 1943–1954 | 2005–2016 | 2008–2019 | 66 years | 48 | 0.2500000 |
| 1955 | 2017 | 2020 | 66 years and 2 months | 50 | 0.2583333 |
| 1956 | 2018 | 2021 | 66 years and 4 months | 52 | 0.2666667 |
| 1957 | 2019 | 2022 | 66 years and 6 months | 54 | 0.2750000 |
| 1958 | 2020 | 2023 | 66 years and 8 months | 56 | 0.2833333 |
| 1959 | 2021 | 2024 | 66 years and 10 months | 58 | 0.2916667 |
| 1960 or later | 2022 and later | 2025 and later | 67 years | 60 | 0.3000000 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

a. If birthday is January 1, refer to previous year.

b. The monthly reduction factor is 0.0055556 for the first 36 months and 0.0041667 for additional months.

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

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A18—Automatic adjustment provisions

| Year enacted | Provision |
|--------------|---|
| | <i>Quarter of coverage</i> |
| 1977 | Mandatory annual determination, beginning in 1978, as to whether 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 Table 2.A8 for average annual wages after 1950). The resulting product, rounded to the nearest multiple of \$10, is the new amount required for a QC. In no case, however, is the new amount reduced below the amount in effect in the year of determination. |
| | <i>Maximum amount of taxable and creditable earnings</i> |
| 1972 | The 1972 Act (as modified by the legislation in 1973) mandated a determination in 1974, and in every subsequent year in which a cost-of-living benefit increase is established, as to whether or not an adjustment is required in the maximum amount of annual earnings that will be taxed and credited toward benefits. The determination in the years after 1975 is made by multiplying the "maximum" in effect in the year of determination by the following quotient: the national average wage for the year before the year of determination, divided by the average wage for the year before the most recent year in which an automatic determination was made that resulted in an increase or in which an increase in the maximum was enacted. (See Table 2.A8 for annual amounts of the average wage after 1950). The resulting product, rounded to the nearest multiple of \$300, is the new maximum amount of taxable and creditable earnings, effective with respect to remuneration paid after the year of determination and with respect to taxable years beginning after that year. In no case, however, is the maximum reduced to an amount below the maximum in the year of determination. |
| 1976 | In the 1974 and 1975 determinations, the quotient was the average wage for the year of determination, estimated from data for the first calendar quarter, divided by the corresponding amount for the year before the year of determination. Public Law (P.L.) 94-202 (signed January 2, 1976) revised the adjustment method by increasing by a year the lag in average wages used in the computation. Thus, for example, the determination in 1976 was based on the percentage increase in the average wage from 1974 to 1975. |
| 1977 | Statutory in lieu of automatic increases in the maximum instituted for 1979, 1980, and 1981. Also, for purposes of establishing a "year of coverage" used in the computation of the special minimum primary insurance amount (PIA), annual maximum taxable and creditable earnings after 1978 are the amounts that would have been determined under the automatic adjustment provisions if the statutory increases in the maximum under the 1977 Act had not been enacted (see Table 2.A12). |
| 1989 | Automatic increases in the maximum for 1990, 1991, and 1992 determined under a transitional rule, specified by the Omnibus Budget Reconciliation Act of 1989, for computing "deemed" average annual wage for 1988, 1989, and 1990. The purpose of the legislation was to include contributions to certain "deferred compensation" plans, most importantly section 401(k) pension plans, in the average annual average wage. |
| 1994 | The determination for years after 1994 is made by multiplying \$60,600, the "maximum" for 1994, by the following quotient: the national average wage index for the year before the year in which the determination is made, divided by the national average wage index for 1992. (See Table 2.A8 for annual amounts of the national average wage index.) The resulting product, rounded to the nearest \$300, is the new maximum amount of taxable and creditable earnings, effective with respect to remuneration paid in (and taxable years beginning in) the year following the year the determination is made. In no case, however, is the new maximum reduced to an amount below the maximum in the year of determination. |
| | <i>Benefits Computation</i> |
| 1977 | New benefit computation method based on average indexed monthly earnings (AIME) after 1950, effective for workers first eligible after 1978. Provision for automatic adjustment of the dollar amounts, or bend points, defining (1) the AIME brackets in the PIA formula (see Table 2.A11) and (2) the PIA brackets in the maximum family benefit formula (see Table 2.A13). New bend points are established by multiplying the bend points in effect in 1979—\$180 and \$1,085 for the PIA formula and \$230, \$332, and \$433 for the maximum family benefit formula—by the following quotient: the national average wage for the second year before the year for which the determination was made, divided by the average wage for 1977 (see Table 2.A8 for average annual wages after 1950). The resulting products, rounded to the nearest dollar, are the new bend points. |
| 1980 | Modified maximum family benefit formula applicable to workers with initial entitlement to disability benefits in or after July 1980 (see Table 2.A14). New formula for disabled workers has no bend points subject to automatic adjustment. |
| | <i>Cost-of-living increase</i> |
| 1972 | Under the original provisions (based on 1972 and 1973 legislation), the arithmetical mean of the consumer price index (CPI) for January, February, and March in the year of determination was compared with the arithmetical mean of the CPI for the later of (a) January, February, and March of the year in which the last effective cost-of-living increase was established or (b) the 3 months of the calendar quarter in which the effective month of the last general benefit increase occurred. (Before the introduction, in 1977, of the alternative CPI series for "all urban consumers," or the CPI-U, the CPI-W was referred to as the CPI.) If the percentage increase in the CPI, rounded to the nearest one-tenth of 1 percent, was at least 3.0 (the triggering requirement), a cost-of-living benefit increase was established and the level of benefits was increased by the same percentage, effective for June of the year in which the determination was made. |

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A18—Automatic adjustment provisions—Continued

| Year enacted | Provision |
|--------------|---|
| | Benefits (cont.) <i>Cost-of-living increase (cont.)</i> |
| 1983 | <p>The 1983 Act moved the effective date for a cost-of-living benefit increase from June to December, beginning in 1983, and eliminated the “triggering requirement” for the 1983 increase only. Effective with the determination made in 1984, the two periods used in calculating the CPI-W percentage increase were shifted from the first to the third quarter.</p> <p>The 1983 Act also introduced an alternative method for determining the size of a cost-of-living adjustment. This method, called the stabilizer provision, is applied when the ratio of the combined OASDI trust fund assets to estimated outgo falls below a certain percentage. The “triggering” percentage is 15 percent for 1985–1988 and 20 percent for years after 1988. Under these circumstances, the cost-of-living adjustment is based on the lesser of the CPI-W percentage increase determined above or the increase in average wages. The latter increase is the percentage, rounded to the nearest one-tenth of 1 percent by which the national average wage for the year before the year of determination exceeds the average wage for the year before the most recent year in which either a cost-of-living increase or a general benefit increase occurred. (See Table 2.A8 for the annual amount of the average wage after 1950 and footnote a in that table for the underlying data sources.)</p> <p>The 1983 legislation also included a provision for making up any benefit increases that are based on a lower wage increase rather than on the increase in the cost of living. When the fund ratio is greater than 32 percent, additional increases will be provided so that benefits are increased to the level at which they would have been if all increases had been based on the CPI-W. (See Table 2.A19 for the cumulative effect of statutory and automatic increases in benefits.)</p> |
| 1986 | Triggering requirement eliminated for cost-of-living increases in and after 1986 by P.L. 99-509 (signed October 21, 1986). |
| 2001 | The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001. |
| | Earnings test |
| 1972 | <p>The 1972 Act (as modified by the 1973 Acts) mandated a determination in 1974, and in every subsequent year in which a cost-of-living increase is established, as to whether 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 Table 2.A8 for annual amounts of the average wage after 1950.) The resulting product, rounded to the nearest multiple of \$10, is the new monthly exempt amount, effective with respect to remuneration paid after the year of determination and with respect to taxable year beginning after that year. In no case, however, is the new exempt amount reduced below the exempt amount in the year of determination. The new annual exempt amount is determined by multiplying the new monthly amount by 12.</p> |
| 1976 | In the 1974 and 1975 determinations, the quotient was the average wage for the year of determination, estimated from data for the first calendar quarter, divided by the corresponding amount for the year before the year of determination. Public Law 94-202 (signed January 2, 1976) revised the adjustment method by increasing by a year the lag in average wages used in the computation. Thus, for example, the 1976 determination was based on the percentage increase in the average wage from 1974 to 1975. |
| 1994 | The determination for years after 1994 is made by multiplying the monthly exempt amounts in effect for 1994 (\$930 for beneficiaries who have, \$670 for beneficiaries who have not yet, reached “full retirement age”; see footnote f in Table 2.A29) by the following quotient: the national average wage for the year before the year in which the determination is made, divided by the national average wage for 1992. (See Table 2.A8 for annual amounts of the national average wage.) The resulting products, rounded to the nearest \$10, are the new monthly exempt amounts effective for the year following the year the determination is made. The new annual exempt amounts are determined by multiplying the new monthly amounts by 12. |
| 1996 | Public Law 104-121, enacted March 29, 1996, suspended the automatic indexing of the exempt amounts through the year 2002 for workers aged 65–69. It legislated ad hoc increases in the annual exempt amounts to \$12,500 in 1996; \$13,500 in 1997; \$14,500 in 1998; \$15,500 in 1999; \$17,000 in 2000; \$25,000 in 2001; and \$30,000 in 2002. Thereafter, the exempt amounts will increase automatically based on the annual increase in the national average wage as under the 1994 legislation. |
| 2000 | Public Law 106-182, enacted April 7, 2000, eliminated the earnings test beginning with the month a beneficiary reaches full retirement age (FRA). The annual earnings test that applies in the year of attainment of FRA is based on the annual limits established under P.L. 104-121 (including the \$1 for \$3 withholding rate). In determining annual earnings for purposes of the annual earnings test under this legislation, only earnings before the month of attainment of FRA will be considered. Public Law 106-182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year, which continues to be pegged to increases in the average wage. |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, “Cost-of-Living Increase and Other Determinations for 2004,” *Federal Register*, vol. 68, no. 204 (October 22, 2003).

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A19—Illustrative benefit growth: Cumulative effect of statutory and automatic increases in benefits using a 100 dollar base benefit

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

(Continued)

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

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

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

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

| Base date | Decem-ber 1990 | Decem-ber 1991 | Decem-ber 1992 | Decem-ber 1993 | Decem-ber 1994 | Decem-ber 1995 | Decem-ber 1996 | Decem-ber 1997 | Decem-ber 1998 | Decem-ber 1999 | Decem-ber 2000 | Decem-ber 2001 | Decem-ber 2002 | Decem-ber 2003 |
|---------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------|----------------|----------------|----------------|----------------|
| August 1950 | 1,276 | 1,323 | 1,363 | 1,398 | 1,437 | 1,475 | 1,518 | 1,549 | 1,570 | 1,609 | 1,665 | 1,708 | 1,732 | 1,769 |
| September 1950 | 721 | 748 | 770 | 790 | 812 | 833 | 857 | 875 | 887 | 909 | 941 | 965 | 979 | 999 |
| September 1952 | 641 | 665 | 684 | 702 | 722 | 741 | 762 | 778 | 788 | 808 | 836 | 858 | 870 | 888 |
| September 1954 | 567 | 588 | 606 | 621 | 639 | 655 | 674 | 689 | 698 | 715 | 740 | 759 | 770 | 786 |
| January 1959 | 530 | 550 | 566 | 581 | 597 | 613 | 630 | 644 | 652 | 668 | 692 | 710 | 720 | 735 |
| January 1965 | 495 | 514 | 529 | 543 | 558 | 573 | 589 | 601 | 609 | 625 | 646 | 663 | 672 | 687 |
| February 1968 | 438 | 455 | 468 | 480 | 494 | 507 | 521 | 532 | 539 | 553 | 572 | 587 | 595 | 608 |
| January 1970 | 381 | 395 | 407 | 418 | 429 | 441 | 453 | 463 | 469 | 481 | 497 | 510 | 517 | 528 |
| January 1971 | 347 | 359 | 370 | 380 | 390 | 401 | 412 | 421 | 426 | 437 | 452 | 464 | 470 | 480 |
| September 1972 | 289 | 299 | 308 | 316 | 325 | 334 | 343 | 351 | 355 | 364 | 377 | 387 | 392 | 400 |
| June 1974 | 260 | 270 | 278 | 285 | 293 | 301 | 309 | 316 | 320 | 328 | 339 | 348 | 353 | 361 |
| June 1975 | 241 | 250 | 257 | 264 | 271 | 278 | 286 | 292 | 296 | 304 | 314 | 323 | 327 | 334 |
| June 1976 | 226 | 235 | 242 | 248 | 255 | 262 | 269 | 275 | 278 | 285 | 295 | 303 | 307 | 314 |
| June 1977 | 214 | 222 | 228 | 234 | 241 | 247 | 254 | 260 | 263 | 270 | 279 | 286 | 290 | 296 |
| June 1978 | 201 | 208 | 214 | 220 | 226 | 232 | 239 | 244 | 247 | 253 | 262 | 269 | 273 | 278 |
| June 1979 | 183 | 189 | 195 | 200 | 206 | 211 | 217 | 222 | 225 | 230 | 238 | 245 | 248 | 253 |
| June 1980 | 160 | 166 | 171 | 175 | 180 | 185 | 190 | 194 | 197 | 201 | 209 | 214 | 217 | 222 |
| June 1981 | 144 | 149 | 153 | 157 | 162 | 166 | 171 | 174 | 177 | 181 | 188 | 192 | 195 | 199 |
| June 1982 | 134 | 139 | 143 | 147 | 151 | 155 | 159 | 162 | 165 | 169 | 175 | 179 | 182 | 185 |
| December 1983 | 129 | 134 | 138 | 142 | 146 | 149 | 154 | 157 | 159 | 163 | 169 | 173 | 176 | 179 |
| December 1984 | 125 | 130 | 133 | 137 | 141 | 144 | 149 | 152 | 154 | 157 | 163 | 167 | 170 | 173 |
| December 1985 | 121 | 126 | 129 | 133 | 136 | 140 | 144 | 147 | 149 | 153 | 158 | 162 | 164 | 168 |
| December 1986 | 120 | 124 | 128 | 131 | 135 | 138 | 142 | 145 | 147 | 151 | 156 | 160 | 162 | 166 |
| December 1987 | 115 | 119 | 123 | 126 | 129 | 133 | 137 | 139 | 141 | 145 | 150 | 154 | 156 | 159 |
| December 1988 | 110 | 114 | 118 | 121 | 124 | 128 | 131 | 134 | 136 | 139 | 144 | 148 | 150 | 153 |
| December 1989 | 105 | 109 | 113 | 116 | 119 | 122 | 125 | 128 | 130 | 133 | 138 | 141 | 143 | 146 |
| December 1990 | 100 | 104 | 107 | 110 | 113 | 116 | 119 | 121 | 123 | 126 | 131 | 134 | 136 | 139 |
| December 1991 | ... | 100 | 103 | 106 | 109 | 111 | 115 | 117 | 119 | 122 | 126 | 129 | 131 | 134 |
| December 1992 | ... | ... | 100 | 103 | 105 | 108 | 111 | 114 | 115 | 118 | 122 | 125 | 127 | 130 |
| December 1993 | ... | ... | ... | 100 | 103 | 105 | 109 | 111 | 112 | 115 | 119 | 122 | 124 | 126 |
| December 1994 | ... | ... | ... | ... | 100 | 103 | 106 | 108 | 109 | 112 | 116 | 119 | 121 | 123 |
| December 1995 | ... | ... | ... | ... | ... | 100 | 103 | 105 | 106 | 109 | 113 | 116 | 117 | 120 |
| December 1996 | ... | ... | ... | ... | ... | ... | 100 | 102 | 103 | 106 | 110 | 113 | 114 | 117 |
| December 1997 | ... | ... | ... | ... | ... | ... | ... | 100 | 101 | 104 | 107 | 110 | 112 | 114 |
| December 1998 | ... | ... | ... | ... | ... | ... | ... | ... | 100 | 103 | 106 | 109 | 110 | 113 |
| December 1999 | ... | ... | ... | ... | ... | ... | ... | ... | ... | 100 | 104 | 106 | 108 | 110 |
| December 2000 | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | 100 | 103 | 104 | 106 |
| December 2001 | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | 100 | 101 | 104 |
| December 2002 | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | 100 | 102 |
| December 2003 | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | 100 |
| Cost-of-living adjustment | 5.4 | 3.7 | 3.0 | 2.6 | 2.8 | 2.6 | 2.9 | 2.1 | 1.3 | ^a 2.5 | 3.5 | 2.6 | 1.4 | 2.1 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

NOTES: Growth reflects cost-of-living adjustments only. Data are rounded to the nearest dollar.

... = not applicable.

- a. The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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

| Year enacted | Age | Percentage of PIA | Condition or qualification | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---------------------------------------|--|------------------------------|---|---------------------------------------|--|------------------------------|-----------|-----------------|------|-----------------|-----------|-----------------|-----------|------------------|------|-----------|-------------|-----------------|-----------|-----------------|------|-----------------|-----------|-----------------|-----------|------------------|------|-----------|----------------|---|-----------|-------------|-----|----------------|-----------|---|
| Retired worker | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1935 | 65 or older | 100 | Fully insured. Amount based on cumulative wages. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1939 | ... | ... | Amount based on PIA. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1956 | Women: 62–64 | ... | Reduced 5/9 of 1% for each month under age 65. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1961 | Men: 62–64 | ... | Reduced 5/9 of 1% for each month under age 65. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1972 | ... | ... | Increased 1/12 of 1% for each month between ages 65 and 72 for which no benefits received after 1970 (PIA based on AMW only). Applicable only to worker whose benefit has not been actuarially reduced. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1977 | ... | ... | Increased 1/4 of 1% for each month after 1981 and between ages 65 and 72 in which no benefits received. Requirement for nonreceipt of actuarially reduced benefit removed. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1983 | 65 and 2 months–67 | ... | Beginning in year 2000, the age at which 100% of PIA is payable will be gradually increased, as follows: <table style="margin-left: 40px; border: none;"> <thead> <tr> <th style="text-align: left;"><i>Applicable PIA payable at age—</i></th> <th style="text-align: left;"><i>Applicable to workers who attain age 62 in—</i></th> </tr> </thead> <tbody> <tr><td>65 and 2 months</td><td>2000</td></tr> <tr><td>65 and 4 months</td><td>2001</td></tr> <tr><td>65 and 6 months</td><td>2002</td></tr> <tr><td>65 and 8 months</td><td>2003</td></tr> <tr><td>65 and 10 months</td><td>2004</td></tr> <tr><td>66</td><td>2005–2016</td></tr> <tr><td>66 and 2 months</td><td>2017</td></tr> <tr><td>66 and 4 months</td><td>2018</td></tr> <tr><td>66 and 6 months</td><td>2019</td></tr> <tr><td>66 and 8 months</td><td>2020</td></tr> <tr><td>66 and 10 months</td><td>2021</td></tr> <tr><td>67</td><td>2022 and later</td></tr> </tbody> </table> | <i>Applicable PIA payable at age—</i> | <i>Applicable to workers who attain age 62 in—</i> | 65 and 2 months | 2000 | 65 and 4 months | 2001 | 65 and 6 months | 2002 | 65 and 8 months | 2003 | 65 and 10 months | 2004 | 66 | 2005–2016 | 66 and 2 months | 2017 | 66 and 4 months | 2018 | 66 and 6 months | 2019 | 66 and 8 months | 2020 | 66 and 10 months | 2021 | 67 | 2022 and later | | | | | | | |
| <i>Applicable PIA payable at age—</i> | <i>Applicable to workers who attain age 62 in—</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 65 and 2 months | 2000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 65 and 4 months | 2001 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 65 and 6 months | 2002 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 65 and 8 months | 2003 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 65 and 10 months | 2004 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 66 | 2005–2016 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 66 and 2 months | 2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 66 and 4 months | 2018 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 66 and 6 months | 2019 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 66 and 8 months | 2020 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 66 and 10 months | 2021 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 67 | 2022 and later | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 62–66 | ... | Reduced 5/9 of 1% for each of the first 36 months of receipt of benefits immediately preceding the age at which 100% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | ... | ... | Increased by the following percentage for each month between the age at which 100% of PIA is payable and age 70 in which no benefits are received: <table style="margin-left: 40px; border: none;"> <thead> <tr> <th style="text-align: left;"><i>Age 62 in years—</i></th> <th style="text-align: left;"><i>Rate of increase</i></th> <th style="text-align: left;"><i>Annual rate (percent)</i></th> </tr> </thead> <tbody> <tr><td>1987–1988</td><td>7/24 of 1%</td><td>3.5</td></tr> <tr><td>1989–1990</td><td>1/3 of 1%</td><td>4</td></tr> <tr><td>1991–1992</td><td>9/24 of 1%</td><td>4.5</td></tr> <tr><td>1993–1994</td><td>10/24 of 1%</td><td>5</td></tr> <tr><td>1995–1996</td><td>11/24 of 1%</td><td>5.5</td></tr> <tr><td>1997–1998</td><td>1/2 of 1%</td><td>6</td></tr> <tr><td>1999–2000</td><td>13/24 of 1%</td><td>6.5</td></tr> <tr><td>2001–2002</td><td>14/24 of 1%</td><td>7</td></tr> <tr><td>2003–2004</td><td>15/24 of 1%</td><td>7.5</td></tr> <tr><td>2005 and later</td><td>2/3 of 1%</td><td>8</td></tr> </tbody> </table> | <i>Age 62 in years—</i> | <i>Rate of increase</i> | <i>Annual rate (percent)</i> | 1987–1988 | 7/24 of 1% | 3.5 | 1989–1990 | 1/3 of 1% | 4 | 1991–1992 | 9/24 of 1% | 4.5 | 1993–1994 | 10/24 of 1% | 5 | 1995–1996 | 11/24 of 1% | 5.5 | 1997–1998 | 1/2 of 1% | 6 | 1999–2000 | 13/24 of 1% | 6.5 | 2001–2002 | 14/24 of 1% | 7 | 2003–2004 | 15/24 of 1% | 7.5 | 2005 and later | 2/3 of 1% | 8 |
| <i>Age 62 in years—</i> | <i>Rate of increase</i> | <i>Annual rate (percent)</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1987–1988 | 7/24 of 1% | 3.5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1989–1990 | 1/3 of 1% | 4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1991–1992 | 9/24 of 1% | 4.5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1993–1994 | 10/24 of 1% | 5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995–1996 | 11/24 of 1% | 5.5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997–1998 | 1/2 of 1% | 6 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1999–2000 | 13/24 of 1% | 6.5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2001–2002 | 14/24 of 1% | 7 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2003–2004 | 15/24 of 1% | 7.5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2005 and later | 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). | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

(Continued)

2.A OASDI: Benefit Types and Levels

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

| Year enacted | Age | Percentage of PIA | Condition or qualification |
|-------------------------------|----------|-------------------|--|
| <i>Disabled worker</i> | | | |
| 1956 | 50–64 | ... | Disability insured. Waiting period of 6 calendar months. Reduced by amount of workers' compensation. |
| 1958 | ... | ... | Reduction for workers' compensation eliminated. |
| 1960 | Under 50 | ... | ... |
| 1965 | ... | ... | Reduced if benefits plus workers' compensation exceed 80% of the higher of AMW or high 5-year average taxable earnings in covered employment. Adjusted periodically for rises in wage levels. |
| 1967 | ... | ... | Reduced if benefits plus workers' compensation exceed 80% of the higher of AMW or high 5-year average earnings in covered employment, regardless of taxable limit. |
| 1972 | ... | ... | Reduced if benefits plus workers' compensation exceed 80% of the highest of (a) AMW, (b) high 5-year average earnings or (c) highest annual earnings in the period consisting of year of disability onset and 5 preceding years in covered employment. |
| | ... | ... | Waiting period reduced to 5 full calendar months. |
| 1983 | ... | ... | Partial offset for receipt of pension based on noncovered employment phased in over a 5-year period beginning in 1986 for individuals first eligible for Social Security and noncovered pension after 1985. |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

NOTE: PIA = primary insurance amount; AMW = average monthly wage; ... = not applicable.

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

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

| Year enacted | Age | Percentage of PIA | Condition or qualification |
|----------------------|--------------------|-------------------|---|
| <i>Wife</i> | | | |
| 1939 | 65 or older | 50 | Fully insured. |
| 1956 | 62–64 | ... | Reduced 25/36 of 1% for each month under age 65. |
| 1967 | ... | ... | Maximum \$105. |
| 1969 | ... | ... | Maximum eliminated. |
| 1977 | ... | ... | Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982. |
| 1983 | ... | ... | Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. |
| | 65 and 2 months–67 | ... | Beginning in year 2000, the age at which 50% of PIA is payable will be gradually increased (see Table 2.A20). |
| | 62–66 | ... | Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt. |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. |
| <i>Divorced wife</i> | | | |
| 1965 | 65 or older | ... | Fully insured. Dependent. Married 20 years. Not counted toward family maximum. |
| | 62–64 | ... | Reduced 25/36 of 1% for each month under age 65. |
| 1967 | ... | ... | Maximum \$105. |
| 1969 | ... | ... | Maximum eliminated. |
| 1972 | ... | ... | Dependency requirement eliminated. |
| 1977 | ... | ... | Married 10 years. |
| | ... | ... | Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and married 20 years. |
| 1983 | ... | ... | Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. |
| | ... | ... | Can be independently entitled to benefits if divorced for 2 years or more (after marriage of 10 or more years) and worker could be entitled to benefits if he applied. Effective with benefits for months after December 1984. |
| | 65 and 2 months–67 | ... | Beginning in year 2000, the age at which 50% of PIA is payable will be gradually increased (see Table 2.A20). |
| | 62–66 | ... | Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt. |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. |
| <i>Wife (mother)</i> | | | |
| 1950 | Under 65 | ... | Fully insured. Caring for eligible child. |
| 1965 | ... | ... | Eligible child excludes student aged 18–21. |
| 1967 | ... | ... | Maximum \$105. |
| 1969 | ... | ... | Maximum eliminated. |
| 1977 | ... | ... | Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982. |
| 1981 | ... | ... | Eligible child excludes nondisabled child aged 16–17. |
| 1983 | ... | ... | Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. |

(Continued)

2.A OASDI: Benefit Types and Levels

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

| Year enacted | Age | Percentage of PIA | Condition or qualification |
|-------------------------|--------------------|-------------------|---|
| Child | | | |
| 1939 | Under 18 | ... | Fully insured. ^a |
| 1965 | 18–21 | ... | Full-time student. |
| 1972 | ... | ... | Benefits extended to end of quarter or semester in which 22nd birthday occurs while undergraduate student. |
| | ... | ... | Includes grandchild under certain circumstances. |
| 1981 | 18–22 | ... | Student benefits eliminated (to be phased out gradually for those entitled before May 1982), except for elementary or secondary school students under age 19. |
| 1996 | ... | ... | Stepchildren must be dependent on worker. |
| Disabled child | | | |
| 1956 | 18 or older | ... | Fully insured. ^a Disabled before age 18. |
| 1972 | ... | ... | Disabled before age 22. |
| | ... | ... | Includes grandchild under certain circumstances. |
| Husband | | | |
| 1950 | 65 or older | 50 | Fully and currently insured. Dependent. |
| 1961 | 62–64 | ... | Reduced 25/36 of 1% for each month under age 65. |
| 1967 | ... | ... | Currently insured requirement eliminated. Maximum \$105. |
| 1969 | ... | ... | Maximum eliminated. |
| 1977 | ... | ... | Dependency requirement eliminated. |
| | ... | ... | Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and dependent. |
| 1983 | ... | ... | Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. |
| | 65 and 2 months–67 | ... | Beginning in year 2000, the age at which 50% of PIA is payable will be gradually increased (see Table 2.A20). |
| | 62–66 | ... | Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt. |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. |
| Divorced husband | | | |
| 1977 ^b | 65 or older | ... | Fully insured. Married 10 years. Not counted toward family maximum. |
| | 62–64 | ... | Reduced 25/36 of 1% for each month under age 65. |
| | ... | ... | Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). |
| 1983 | ... | ... | Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible after June 1983. |
| | ... | ... | Can be independently entitled to benefits if divorced for 2 years or more (after marriage of 10 or more years) and worker could be entitled to benefits if she applied. Effective with benefits for months after December 1984. |
| | 65 and 2 months–67 | ... | Beginning in year 2000, the age at which 50% of PIA is payable will be gradually increased (see Table 2.A20). |
| | 62–66 | ... | Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt. |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. |

(Continued)

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

| Year enacted | Age | Percentage of PIA | Condition or qualification |
|-------------------------|----------|-------------------|--|
| Husband (father) | | | |
| 1978 ^c | Under 65 | ... | Fully insured. Caring for eligible child. Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). |
| 1981 | ... | ... | Eligible child excludes nondisabled child aged 16–17. |
| 1983 | ... | ... | Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

NOTE: PIA = primary insurance amount; ... = not applicable.

- a. Under the Act of 1939, generally not available to child of married female worker. Under the Act of 1950, available if female worker is fully and currently insured. Currently insured requirement eliminated by the Act of 1967.
- b. Northern District of California District Court decision in *Oliver v. Califano*, June 24, 1977. Statutory change enacted in 1983.
- c. Eastern District of Pennsylvania District Court decision in *Cooper v. Califano*, December 29, 1978. Statutory change enacted in 1983.

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2.A OASDI: Benefit Types and Levels

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

| Year enacted | Age | Percentage of PIA | Condition or qualification | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---------------------------------------|---|-------------------|--|---------------------------------------|---|-----------------|------|-----------------|------|-----------------|------|-----------------|------|------------------|------|----|-----------|-----------------|------|-----------------|------|-----------------|------|-----------------|------|------------------|------|----|----------------|
| Widow | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1939 | 65 or older | 75 | Fully insured. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1956 | 62–64 | ... | ... | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1961 | ... | 82.5 | ... | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1965 | 60–61 | ... | Reduced 5/9 of 1% for each month under age 62. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1972 | 65 or older | 100 | Limited, if husband retired before age 65, to amount husband would be receiving if still living, but not less than 82 1/2% of PIA. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 60–64 | ... | Reduced 19/40 of 1% each month under age 65. In addition, for a widow aged 62–64 whose husband retired before age 65 limited to amount he would be receiving if still living, but not less than 82 1/2% of PIA. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1977 | ... | ... | Increased by any delayed retirement credit husband would be receiving. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | ... | ... | Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1983 | ... | ... | Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 65 and 2 months–67 | ... | Beginning in year 2000, the age at which 100% of PIA is payable will be gradually increased, as follows: <table style="margin-left: 40px; border: none;"> <tr> <td style="text-align: center;"><i>Applicable PIA payable at age—</i></td> <td style="text-align: center;"><i>Applicable to widows who attain age 60 in—</i></td> </tr> <tr> <td style="text-align: center;">65 and 2 months</td> <td style="text-align: center;">2000</td> </tr> <tr> <td style="text-align: center;">65 and 4 months</td> <td style="text-align: center;">2001</td> </tr> <tr> <td style="text-align: center;">65 and 6 months</td> <td style="text-align: center;">2002</td> </tr> <tr> <td style="text-align: center;">65 and 8 months</td> <td style="text-align: center;">2003</td> </tr> <tr> <td style="text-align: center;">65 and 10 months</td> <td style="text-align: center;">2004</td> </tr> <tr> <td style="text-align: center;">66</td> <td style="text-align: center;">2005–2016</td> </tr> <tr> <td style="text-align: center;">66 and 2 months</td> <td style="text-align: center;">2017</td> </tr> <tr> <td style="text-align: center;">66 and 4 months</td> <td style="text-align: center;">2018</td> </tr> <tr> <td style="text-align: center;">66 and 6 months</td> <td style="text-align: center;">2019</td> </tr> <tr> <td style="text-align: center;">66 and 8 months</td> <td style="text-align: center;">2020</td> </tr> <tr> <td style="text-align: center;">66 and 10 months</td> <td style="text-align: center;">2021</td> </tr> <tr> <td style="text-align: center;">67</td> <td style="text-align: center;">2022 and later</td> </tr> </table> | <i>Applicable PIA payable at age—</i> | <i>Applicable to widows who attain age 60 in—</i> | 65 and 2 months | 2000 | 65 and 4 months | 2001 | 65 and 6 months | 2002 | 65 and 8 months | 2003 | 65 and 10 months | 2004 | 66 | 2005–2016 | 66 and 2 months | 2017 | 66 and 4 months | 2018 | 66 and 6 months | 2019 | 66 and 8 months | 2020 | 66 and 10 months | 2021 | 67 | 2022 and later |
| <i>Applicable PIA payable at age—</i> | <i>Applicable to widows who attain age 60 in—</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 65 and 2 months | 2000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 65 and 4 months | 2001 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 65 and 6 months | 2002 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 65 and 8 months | 2003 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 65 and 10 months | 2004 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 66 | 2005–2016 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 66 and 2 months | 2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 66 and 4 months | 2018 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 66 and 6 months | 2019 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 66 and 8 months | 2020 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 66 and 10 months | 2021 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 67 | 2022 and later | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 60–66 | ... | The percent of reduction for each month depends on the age at which 100% of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2% at age 60. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Disabled widow | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1967 | 50–59 | 82.5 | Fully insured. Reduced 13 1/3%, plus 43/198 of 1% for each month under age 60. Includes divorced wife, dependent and married 20 years. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1972 | ... | 100 | Reduced 28 1/2%, plus 43/240 of 1% for each month under age 60. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1977 | ... | ... | Increased by any delayed retirement credit husband would be receiving. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | ... | ... | Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1983 | ... | ... | Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | ... | ... | Additional reduction for each month under age 60 eliminated. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Surviving divorced wife | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1965 | 60 or older | 82.5 | Fully insured. Dependent. Married 20 years. Not counted toward family maximum. Reduced 5/9 of 1% for each month under age 62. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1972 | 65 or older | 100 | Limited, if former husband retired before age 65, to amount he would be receiving if still living, but not less than 82 1/2% of PIA. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 60–64 | ... | Reduced 19/40 of 1% for each month under age 65. In addition, for widow aged 62–64 whose former husband retired before age 65, limited to amount he would be receiving if still living, but not less than 82 1/2% of PIA. | | | | | | | | | | | | | | | | | | | | | | | | | | |

(Continued)

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

| Year enacted | Age | Percentage of PIA | Condition or qualification |
|---|--------------------|-------------------|---|
| Surviving divorced wife (cont.) | | | |
| 1977 | ... | ... | Dependency requirement eliminated. |
| | ... | ... | Increased by any delayed retirement increment former husband would be receiving. |
| | ... | ... | Married 10 years. |
| | ... | ... | Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and married 20 years. |
| 1983 | ... | ... | Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. |
| | 65 and 2 months–67 | ... | Beginning in year 2000, the age at which 100% of PIA is payable will be gradually increased (see Widow). |
| | 60–66 | ... | The percent of reduction for each month depends on the age at which 100% of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2% at age 60. |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. |
| Disabled surviving divorced wife | | | |
| 1967 | 50–59 | 82.5 | Fully insured. Dependent. Married 20 years. Not counted toward family maximum. Reduced 13 1/3%, plus 43/198 of 1% for each month under age 62. |
| 1972 | ... | 100 | Reduced 28 1/2%, plus 43/240 of 1% for each month under age 60. |
| | ... | ... | Dependency requirement eliminated. |
| 1977 | ... | ... | Increased by any delayed retirement increment husband (or former husband) would be receiving. |
| | ... | ... | Married 10 years. |
| | ... | ... | Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and married 20 years. |
| 1983 | ... | ... | Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. |
| | ... | ... | Additional reduction for each month under age 60 eliminated. |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. |
| Widowed mother | | | |
| 1939 | Under 65 | 75 | Fully or currently insured. Caring for eligible child. |
| 1965 | ... | ... | Eligible child excludes student over age 18. |
| 1977 | ... | ... | Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982. |
| 1981 | ... | ... | Eligible child excludes nondisabled child aged 16–17. |
| 1983 | ... | ... | Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. |
| Surviving divorced mother | | | |
| 1950 | Under 65 | 75 | Fully or currently insured. Caring for eligible child. Dependent. Not counted toward family maximum. |
| 1965 | ... | ... | Eligible child excludes student over age 18. |
| 1972 | ... | ... | Dependency requirement eliminated. |
| 1977 | ... | ... | Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982. |
| 1981 | ... | ... | Eligible child excludes nondisabled child aged 16–17. |
| 1983 | ... | ... | Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. |
| Child | | | |
| 1939 | Under 18 | 50 | Fully or currently insured. ^a Student aged 16–17. |
| 1946 | ... | ... | Student requirement eliminated. |
| 1950 | ... | ... | Plus 25% of PIA divided among the children. |
| 1960 | ... | 75 | Additional 25% of PIA eliminated. |

(Continued)

2.A OASDI: Benefit Types and Levels

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

| Year enacted | Age | Percentage of PIA | Condition or qualification |
|-------------------------|--------------------|-------------------|--|
| Child (cont.) | | | |
| 1965 | ... | ... | Full-time student. |
| 1972 | ... | ... | Benefits extended to end of quarter or semester in which 22nd birthday occurs while undergraduate student. |
| | ... | ... | Includes grandchild under certain circumstances. |
| 1981 | 18–22 | ... | Student category eliminated (to be phased out gradually for those entitled before May 1982), except for elementary or secondary school students under age 19. |
| 1996 | ... | ... | Stepchildren must be dependent on worker. |
| Disabled child | | | |
| 1956 | 18 or older | 50 | Fully or currently insured. ^a Disabled before age 18. Plus 25% of PIA divided among the children. |
| 1960 | ... | 75 | Additional 25% of PIA eliminated. |
| 1972 | ... | ... | Disabled before age 22. |
| | ... | ... | Includes grandchild under certain circumstances. |
| Parent | | | |
| 1939 | 65 or older | 50 | Fully insured. Dependent. No surviving widow or child under age 18. |
| 1946 | ... | ... | No surviving eligible widow or child. |
| 1950 | ... | 75 | ... |
| 1956 | 62–64 | ... | Women. |
| 1958 | ... | ... | No-other-survivor requirement eliminated. |
| 1961 | 62 or older | 82.5 | 75% each if two parents. |
| Widower | | | |
| 1950 | 65 or older | 75 | Fully and currently insured. Dependent. |
| 1961 | 62 or older | 82.5 | ... |
| 1967 | ... | ... | Currently insured requirement eliminated. |
| 1972 | 65 or older | 100 | Limited, if wife retired before age 65, to amount wife would be receiving if still living, but not less than 82 1/2% of PIA. |
| | 60–64 | ... | Reduced 19/40 of 1% for each month under age 65. In addition, for a widower aged 62–64 whose wife retired before age 65, limited to amount she would be receiving if still living, but not less than 82 1/2% of PIA. |
| 1977 | ... | ... | Dependency requirement eliminated. |
| | ... | ... | Increased by any delayed retirement increment wife would be receiving. |
| | ... | ... | Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982, dependent, and not remarried before age 60. |
| 1983 | ... | ... | Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. |
| | 65 and 2 months–67 | ... | Beginning in year 2000, the age at which 100% of PIA is payable will be gradually increased (see Widow). |
| | 60–66 | ... | The percent of reduction for each month depends on the age at which 100% of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2% at age 60. |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. |
| Disabled widower | | | |
| 1967 | 50–61 | 82.5 | Fully insured. Dependent. Reduced 5/9 of 1% per month between ages 60–62, plus 43/198 of 1% for each month under age 60. |
| 1972 | 50–59 | 100 | Reduced 28 1/2%, plus 43/240 of 1% for each month under age 60. Disability requirement eliminated for ages 60–61. |
| | ... | ... | Dependency requirement eliminated. |
| 1977 | ... | ... | Increased by any delayed retirement increment wife would be receiving. |
| | ... | ... | Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982, dependent, and not remarried before age 60. |

(Continued)

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

| Year enacted | Age | Percentage of PIA | Condition or qualification |
|--|--------------------|-------------------|--|
| Disabled widower (cont.) | | | |
| 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. |
| Surviving divorced husband | | | |
| 1980 ^b | 65 or older | 100 | Fully insured. Married 10 years. Increased by any delayed retirement credit former wife would be receiving. Limited, if former wife retired before age 65, to amount she would be receiving if still living, but not less than 82 1/2% of PIA. Not counted toward family maximum. Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). |
| | 60–64 | ... | Reduced 19/40 of 1% for each month under age 65. In addition, for a widower aged 62–64 whose wife retired before age 65, limited to amount she would be receiving if still living, but not less than 82 1/2% of PIA. |
| 1983 | ... | ... | Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. |
| | 65 and 2 months–67 | ... | Beginning in year 2000, the age at which 100% of PIA is payable will be gradually increased (see Widower). |
| | 60–66 | ... | The percent of reduction for each month depends on the age at which 100% of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2% at age 60. |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. |
| Disabled surviving divorced husband | | | |
| 1980 ^b | 50–59 | 100 | Fully insured. Married 10 years. Increased by any delayed retirement credit former wife would be receiving. Reduced 28 1/2%, plus 43/240 of 1% for each month under age 60. Not counted toward family maximum. Reduced by full amount of pension payable based on own earnings in noncovered employment (noncovered pension offset). |
| 1983 | ... | ... | Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. |
| | ... | ... | Additional reduction for each month under age 60 eliminated. |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. |
| Widowed father | | | |
| 1975 ^c | Under 65 | 75 | Fully or currently insured. Caring for eligible child under age 18. |
| 1977 | ... | ... | Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982. |
| 1981 | ... | ... | Eligible child excludes nondisabled child aged 16–17. |
| 1983 | ... | ... | Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. |
| 1984 | ... | ... | Noncovered pension offset to two-thirds of such pension. |
| Surviving divorced father | | | |
| 1979 ^d | Under 65 | 75 | Fully or currently insured. Caring for eligible child under age 18. Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). |
| 1981 | ... | ... | Eligible child excludes nondisabled child aged 16–17. |
| 1983 | ... | ... | Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983. |
| 1984 | ... | ... | Noncovered pension offset limited to two-thirds of such pension. |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

NOTE: PIA = primary insurance amount; ... = not applicable.

- a. Under the Act of 1939, generally not available to child of married female worker. Under the Act of 1950, available if female worker is fully and currently insured; currently insured requirement eliminated by the Act of 1967.
- b. Oregon District Court decision in *Ambrose v. Harris*, July 17, 1980. Statutory change enacted in 1983.
- c. Supreme Court decision in *Weinberger v. Wiesenfeld*, March 19, 1975. Statutory change enacted in 1983.
- d. Western District Court decision in *Yates v. Califano*, January 28, 1979. Statutory change enacted in 1983.

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

2.A OASDI: Benefit Types and Levels

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

| Type of benefit | Effective date | Amount |
|------------------------|----------------|--|
| <i>Enacted in 1965</i> | | |
| Worker | September 1965 | \$35.00 |
| | October 1966 | Same as benefit for individual receiving special age-72 benefits (see Table 2.A24) |
| Wife | September 1963 | One-half of worker's benefit |
| Widow | September 1963 | Same as worker's benefit |
| <i>Enacted in 1983</i> | | |
| Husband | May 1983 | One-half of worker's benefit |
| Widower | May 1983 | Same as worker's benefit |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

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

| Year enacted | Effective date | Age | Amount ^a (dollars) | |
|-------------------|----------------------------|-----------------------------|-------------------------------|--------|
| | | | Individual | Couple |
| 1966 | October 1966 | 72 | 35.00 | 52.50 |
| 1967 | February 1968 | ... | 40.00 | 60.00 |
| 1969 | January 1970 | ... | 46.00 | 69.00 |
| 1971 | January 1971 | ... | 48.30 | 72.50 |
| 1972 ^b | September 1972 | ... | 58.00 | 87.00 |
| 1973 ^c | June–December 1974 | ... | 61.50 | 92.30 |
| 1973 ^d | March 1974 | ... | 62.10 | 93.20 |
| | June 1974 | ... | 64.40 | 96.60 |
| | June 1975 | ... | 69.50 | 104.40 |
| | June 1976 | ... | 74.10 | 111.20 |
| | June 1977 | ... | 78.50 | 117.80 |
| | June 1978 | ... | 83.70 | 125.60 |
| | June 1979 | ... | 92.00 | 138.10 |
| | June 1980 | ... | 105.20 | 157.90 |
| | June 1981 | ... | 117.00 | 175.70 |
| | June 1982 | ... | 125.60 | 188.60 |
| 1983 ^e | December 1983 | ... | 129.90 | ... |
| | December 1984 | ... | 134.40 | ... |
| | December 1985 | ... | 138.50 | ... |
| | December 1986 | ... | 140.30 | ... |
| | December 1987 | ... | 146.10 | ... |
| | December 1988 | ... | 151.90 | ... |
| | December 1989 | ... | 159.00 | ... |
| 1990 | December 1990 | 72 before 1972 ^f | 167.50 | ... |
| | December 1991 | ... | 173.60 | ... |
| | December 1992 | ... | 178.80 | ... |
| | December 1993 | ... | 183.40 | ... |
| | December 1994 | ... | 188.50 | ... |
| | December 1995 | ... | 193.40 | ... |
| | December 1996 | ... | 199.00 | ... |
| | December 1997 | ... | 203.10 | ... |
| | December 1998 | ... | 205.70 | ... |
| | December 1999 ^g | ... | 210.80 | ... |
| | December 2000 | ... | 218.10 | ... |
| | December 2001 | ... | 223.70 | ... |
| | December 2002 | ... | 226.80 | ... |
| December 2003 | ... | 231.50 | ... | |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

NOTE: ... = not applicable.

- Monthly benefit reduced by amount of any government pension excluding workers' compensation benefits and veterans' compensation for service-connected disability or death. Not available for persons receiving assistance.
- Provision for future automatic cost-of-living adjustments.
- Suspended by legislation in 1973.
- Beginning June 1975, subject to automatic cost-of-living adjustments. Benefits no longer available to persons receiving payments under the Supplemental Security Income program.
- Separate rate for couples eliminated. Rate for individuals applied to all beneficiaries.
- Effective for applications after November 5, 1990.
- The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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2.A OASDI: Benefit Types and Levels

Table 2.A25—Lump-sum benefits and vocational rehabilitation services, by type of benefit

| Year enacted | Provision |
|--|--|
| <i>Lump-sum refund</i> | |
| 1935 | Persons not insured at age 65 eligible for lump-sum refund equal to 3.5 percent of cumulative wage credits. |
| 1939 | Lump-sum refund eliminated. |
| <i>Lump-sum death payment</i> | |
| 1935 | Under age 65: 3.5 percent of cumulative wage credits. Aged 65 or older and fully insured: 3.5 percent of cumulative wage credits, less monthly benefits received. |
| 1939 | Fully and currently insured: 6 times PIA if no survivor eligible for monthly benefits. |
| 1950 | 3 times PIA for all deaths. |
| 1954 | 3 times PIA with maximum of \$255. |
| 1981 | Payable only to a widow or widower who was living with the worker at time of the death or to a widow, widower, or children eligible for monthly benefits. Amount of lump sum fixed at \$255. |
| <i>Vocational rehabilitation services</i> | |
| 1965 | Available to selected disabled individuals. Costs of services payable from OASDI trust funds to state vocational rehabilitation agencies. Reimbursement in any year may not exceed 1 percent of the total amount of OASDI disability benefits disbursed in the prior year. |
| 1972 | Maximum annual reimbursement increased to 1.25 percent for fiscal year ending June 30, 1973, and 1.50 percent thereafter. |
| 1981 | Reimbursement from trust funds for cost of rehabilitation services made if the services result in the disabled individual's return to work (performance of substantial gainful activity for 9 consecutive months). |
| 1999 | Enhancements including expanded beneficiary choice of service providers and extended health care for beneficiaries who return to work. |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>.

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Table 2.A26—Monthly benefit amount for selected beneficiary families with first eligibility in 2003, by average indexed monthly earnings for stipulated yearly wage levels, effective December 2003 (in dollars)

| Beneficiary family | Federal minimum wage ^a | 75% of average wage | Average wage ^b | 150% of average wage | Maximum taxable earnings ^c |
|---|-----------------------------------|---------------------|---------------------------|----------------------|---------------------------------------|
| Retired-worker families^d | | | | | |
| Average indexed monthly earnings | 1,271.00 | 2,058.00 | 2,744.00 | 4,038.00 | 5,729.00 |
| Primary insurance amount | 774.10 | 1,031.20 | 1,255.30 | 1,611.20 | 1,870.20 |
| Maximum family benefit | 1,161.10 | 1,840.70 | 2,293.20 | 2,820.40 | 3,273.70 |
| Monthly benefit amount for retired worker claiming benefits at age 62 | | | | | |
| Worker alone | 593.00 | 790.00 | 962.00 | 1,235.00 | 1,433.00 |
| Worker with spouse claiming benefits at— | | | | | |
| Full retirement age or older ^e | 980.00 | 1,305.00 | 1,589.00 | 2,040.00 | 2,368.00 |
| Age 62 | 870.00 | 1,159.00 | 1,411.00 | 1,812.00 | 2,103.00 |
| Survivor families^f | | | | | |
| Average indexed monthly earnings | 1,035.00 | 2,059.00 | 2,745.00 | 4,118.00 | 6,720.00 |
| Primary insurance amount | 696.90 | 1,031.50 | 1,255.60 | 1,623.40 | 2,021.90 |
| Maximum family benefit | 1,045.40 | 1,841.50 | 2,293.50 | 2,841.80 | 3,539.10 |
| Monthly benefit amount for survivor of worker deceased at age 40 | | | | | |
| 1 surviving child | 522.00 | 773.00 | 941.00 | 1,217.00 | 1,516.00 |
| Widowed mother or father and 1 child | 1,044.00 | 1,546.00 | 1,882.00 | 2,434.00 | 3,032.00 |
| Widowed mother or father and 2 children | 1,044.00 | 1,839.00 | 2,292.00 | 2,841.00 | 3,537.00 |
| Disabled-worker families^g | | | | | |
| Average indexed monthly earnings | 1,175.00 | 2,058.00 | 2,744.00 | 4,117.00 | 6,535.00 |
| Primary insurance amount | 742.60 | 1,031.20 | 1,255.30 | 1,623.30 | 1,993.70 |
| Maximum family benefit ^h | 1,019.60 | 1,546.80 | 1,882.90 | 2,435.00 | 2,990.50 |
| Monthly benefit amount for disabled worker age 50 | | | | | |
| Worker alone | 742.00 | 1,031.00 | 1,255.00 | 1,623.00 | 1,993.00 |
| Worker, spouse, and 1 child | 1,018.00 | 1,545.00 | 1,881.00 | 2,433.00 | 2,989.00 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

- a. Annual earnings are calculated by multiplying the federal minimum wage by 2,080 hours (see Table 3.B3). Increases in the minimum wage during the year are prorated.
- b. See Table 2.A8.
- c. See Table 2.A9.
- d. Assumes the worker began to work at age 22, retired at age 62 in 2003 with maximum reduction, and had no prior period of disability.
- e. The full retirement age is the earliest age at which an unreduced spousal benefit is payable.
- f. Assumes the deceased worker began to work at age 22, died in 2003 at age 40, had no earnings in that year, and had no prior period of disability.
- g. Assumes the worker began to work at age 22, became disabled at age 50 in 2003, had no earnings in that year, and had no prior period of disability.
- h. The Amendments of 1980 to the Social Security Act provide for a different family maximum amount in disability cases. For disabled workers entitled after June 1980, the maximum is the smaller of (1) 85 percent of the worker's average indexed monthly earnings (or 100 percent of the primary insurance amount, if larger) or (2) 150 percent of the primary insurance amount.

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

2.A OASDI: Benefit Types and Levels

Table 2.A27—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 62, by year they attained age 62, 1957–2004 (in dollars)

| Year ^a | Minimum benefit payable | | Maximum benefit payable | | | |
|-------------------|-------------------------|--------------------------------------|-------------------------|---------------------|--------------------------------------|-----------------------|
| | At retirement | Effective December 2003 ^b | At retirement | | Effective December 2003 ^b | |
| | | | Men | Women | Men | Women |
| 1957 | 24.00 | 318.30 | ... | 86.80 | ... | 784.70 |
| 1958 | 24.00 | 318.30 | ... | 86.80 | ... | 784.70 |
| 1959 | 26.40 | 318.30 | ... | 92.80 | ... | 784.70 |
| 1960 | 26.40 | 316.90 | ... | 95.20 | ... | 804.90 |
| 1961 | 26.40 | 315.10 | ... | 96.00 | ... | 810.70 |
| 1962 | 32.00 | 314.20 | 93.60 | 96.80 | 817.90 | 817.90 |
| 1963 | 32.00 | 312.60 | 94.40 | 97.60 | 823.30 | 823.30 |
| 1964 | 32.00 | 312.60 | 95.20 | 98.40 | 828.70 | 828.70 |
| 1965 | 35.20 | 312.20 | 102.80 | 105.40 | 826.90 | 826.90 |
| 1966 | 35.20 | 309.50 | 102.80 | 106.20 | 829.80 | 829.80 |
| 1967 | 35.20 | 307.70 | 105.40 | 108.80 | 846.70 | 846.70 |
| 1968 | ^c 44.00 | 303.70 | ^c 121.00 | ^c 124.80 | 851.90 | 851.90 |
| 1969 | 44.00 | 300.70 | 124.80 | 128.40 | 867.40 | 867.40 |
| 1970 | 51.20 | 296.40 | 146.80 | 151.90 | 880.30 | 880.30 |
| 1971 | 56.40 | 292.50 | 163.60 | 170.50 | 886.10 | 886.10 |
| 1972 | 56.40 | 288.40 | 167.10 | 172.90 | 885.90 | 885.90 |
| 1973 | 67.60 | 284.40 | 207.60 | 212.90 | 895.60 | 895.60 |
| 1974 | 67.60 | 279.80 | 217.00 | 219.70 | 910.00 | 910.00 |
| 1975 | 75.10 | 276.10 | 253.10 | 253.10 | 931.00 | 931.00 |
| 1976 | 81.20 | 272.90 | 285.60 | 285.60 | 961.30 | 961.30 |
| 1977 | 86.40 | 270.80 | 319.40 | 319.40 | 1,003.60 | 1,003.60 |
| 1978 | 91.50 | 269.60 | 354.60 | 354.60 | 1,049.60 | 1,049.60 |
| 1979 | 97.60 | 270.70 | ^d 388.90 | ^d 388.90 | 1,081.10 | 1,081.10 |
| 1980 | 97.60 | 246.00 | ^d 402.80 | ^d 402.80 | 1,018.70 | 1,018.70 |
| 1981 | 97.60 | 214.90 | 432.00 | 432.00 | 955.50 | 955.50 |
| 1982 | ^e | ^e | 474.60 | 474.60 | 944.30 | 944.30 |
| 1983 | ^e | ^e | 526.40 | 526.40 | 974.80 | 974.80 |
| 1984 | ^e | ^e | 559.40 | 559.40 | 1,001.00 | 1,001.00 |
| 1985 | ^e | ^e | 591.30 | 591.30 | 1,022.80 | 1,022.80 |
| 1986 | ^e | ^e | 630.50 | 630.50 | 1,057.70 | 1,057.70 |
| 1987 | ^e | ^e | 662.10 | 662.10 | 1,096.50 | 1,096.50 |
| 1988 | ^e | ^e | 686.70 | 686.70 | 1,091.50 | 1,091.50 |
| 1989 | ^e | ^e | 734.00 | 734.00 | 1,121.70 | 1,121.70 |
| 1990 | ^e | ^e | 774.60 | 774.60 | 1,130.80 | 1,130.80 |
| 1991 | ^e | ^e | 810.00 | 810.00 | 1,121.90 | 1,121.90 |
| 1992 | ^e | ^e | 854.10 | 854.10 | 1,141.10 | 1,141.10 |
| 1993 | ^e | ^e | 893.60 | 893.60 | 1,159.20 | 1,159.20 |
| 1994 | ^e | ^e | 948.00 | 948.00 | 1,198.60 | 1,198.60 |
| 1995 | ^e | ^e | 965.90 | 965.90 | 1,188.10 | 1,188.10 |
| 1996 | ^e | ^e | 999.90 | 999.90 | 1,198.80 | 1,198.80 |
| 1997 | ^e | ^e | 1,049.10 | 1,049.10 | 1,222.50 | 1,222.50 |
| 1998 | ^e | ^e | 1,109.60 | 1,109.60 | 1,266.50 | 1,266.50 |
| 1999 | ^e | ^e | 1,183.60 | 1,183.60 | ^f 1,333.50 | ^f 1,333.50 |

(Continued)

Table 2.A27—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 62, by year they attained age 62, 1957–2004 (in dollars)—Continued

| Year ^a | Minimum benefit payable | | Maximum benefit payable | | | |
|-------------------|-------------------------|--------------------------------------|-------------------------|----------|--------------------------------------|----------|
| | At retirement | Effective December 2003 ^b | At retirement | | Effective December 2003 ^b | |
| | | | Men | Women | Men | Women |
| 2000 | e | e | 1,241.70 | 1,241.70 | 1,364.90 | 1,364.90 |
| 2001 | e | e | 1,307.30 | 1,307.30 | 1,388.40 | 1,388.40 |
| 2002 | e | e | 1,375.30 | 1,375.30 | 1,423.70 | 1,423.70 |
| 2003 | e | e | 1,404.30 | 1,404.30 | 1,433.70 | 1,433.70 |
| 2004 | e | e | 1,414.80 | 1,414.80 | ... | ... |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

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

... = not applicable.

- a. Assumes the worker began to work at age 22, retired at the beginning of the year, had no prior disability, and received the maximum reduction. Through 1999, the assumed reduction was 36 months at 5/9 of 1 percent per month or 20 percent. In 2000, with the increase in the full retirement age (FRA) to 65 and 2 months, the reduction increased to 20.008333 percent (see Tables 2.A17.1 and 2.A20). In 2001, the FRA increased to 65 and 4 months for a maximum reduction to 21.666667 percent. In 2002, the FRA increased to 65 and 6 months for a maximum reduction of 22.5 percent. In 2003, the FRA increased to 65 and 8 months for a maximum reduction of 23.333333 percent. In 2004, the FRA increased to 65 and 10 months for a maximum reduction of 24.16667 percent.
- b. Final benefit amount payable after Supplementary Medical Insurance (SMI) premium or any other deduction is rounded to next lower \$1.
- c. Effective February 1968.
- d. Derived from transitional guarantee computation based on primary insurance amount (PIA) table of 1978.
- e. In 1981, legislation eliminated the minimum PIA for workers who attain age 62 in 1982 or later. (The minimum is retained until 1991 for members of religious orders who were under a vow of poverty, provided that the order had elected Social Security coverage before December 29, 1981.)
- f. The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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

2.A OASDI: Benefit Types and Levels

Table 2.A28—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 65, by year they attained age 65, 1940–2004 (in dollars)

| Year ^a | Minimum benefit payable | | Maximum benefit payable | | | |
|-------------------|-------------------------|--------------------------------------|-------------------------|---------------------|--------------------------------------|-----------------------|
| | At retirement | Effective December 2003 ^b | At retirement | | Effective December 2003 ^b | |
| | | | Men | Women | Men | Women |
| 1940 | 10.00 | 337.60 | 41.20 | 41.20 | 654.70 | 654.70 |
| 1941 | 10.00 | 337.60 | 41.60 | 41.60 | 654.70 | 654.70 |
| 1942 | 10.00 | 337.60 | 42.00 | 42.00 | 662.50 | 662.50 |
| 1943 | 10.00 | 337.60 | 42.40 | 42.40 | 662.50 | 662.50 |
| 1944 | 10.00 | 337.60 | 42.80 | 42.80 | 662.50 | 669.60 |
| 1945 | 10.00 | 337.60 | 43.20 | 43.20 | 669.60 | 669.60 |
| 1946 | 10.00 | 337.60 | 43.60 | 43.60 | 677.70 | 677.70 |
| 1947 | 10.00 | 337.60 | 44.00 | 44.00 | 684.00 | 684.00 |
| 1948 | 10.00 | 337.60 | 44.40 | 44.40 | 684.00 | 684.00 |
| 1949 | 10.00 | 337.60 | 44.80 | 44.80 | 691.00 | 691.00 |
| 1950 | 10.00 | 337.60 | 45.20 | 45.20 | 699.50 | 699.50 |
| 1951 | 20.00 | 337.60 | 68.50 | 68.50 | 699.50 | 699.50 |
| 1952 | 20.00 | 337.60 | 68.50 | 68.50 | 699.50 | 699.50 |
| 1953 | 25.00 | 337.60 | 85.00 | 85.00 | 772.80 | 772.80 |
| 1954 | 25.00 | 337.60 | 85.00 | 85.00 | 772.80 | 772.80 |
| 1955 | 30.00 | 337.60 | 98.50 | 98.50 | 772.80 | 772.80 |
| 1956 | 30.00 | 337.60 | 103.50 | 103.50 | 816.50 | 816.50 |
| 1957 | 30.00 | 337.60 | 108.50 | 108.50 | 853.40 | 853.40 |
| 1958 | 30.00 | 337.60 | 108.50 | 108.50 | 853.40 | 853.40 |
| 1959 | 33.00 | 337.60 | 116.00 | 116.00 | 853.40 | 853.40 |
| 1960 | 33.00 | 337.60 | 119.00 | 119.00 | 874.80 | 874.80 |
| 1961 | 33.00 | 337.60 | 120.00 | 120.00 | 881.80 | 881.80 |
| 1962 | 40.00 | 337.60 | 121.00 | 123.00 | 889.90 | 905.00 |
| 1963 | 40.00 | 337.60 | 122.00 | 125.00 | 896.90 | 918.50 |
| 1964 | 40.00 | 337.60 | 123.00 | 127.00 | 905.00 | 933.90 |
| 1965 | 44.00 | 337.60 | 131.70 | 135.90 | 905.00 | 933.90 |
| 1966 | 44.00 | 337.60 | 132.70 | 135.90 | 911.60 | 933.90 |
| 1967 | 44.00 | 337.60 | 135.90 | 140.00 | 933.90 | 961.50 |
| 1968 | ^c 55.00 | 337.60 | ^c 156.00 | ^c 161.60 | 947.90 | 982.00 |
| 1969 | 55.00 | 337.60 | 160.50 | 167.30 | 975.70 | 1,016.70 |
| 1970 | 64.00 | 337.60 | 189.80 | 196.40 | 1,003.00 | 1,038.70 |
| 1971 | 70.40 | 337.60 | 213.10 | 220.40 | 1,023.50 | 1,057.80 |
| 1972 | 70.40 | 337.60 | 216.10 | 224.70 | 1,038.70 | 1,079.20 |
| 1973 | 84.50 | 337.60 | 266.10 | 276.40 | 1,065.20 | 1,106.50 |
| 1974 | 84.50 | 337.60 | 274.60 | 284.90 | 1,098.60 | 1,140.40 |
| 1975 | 93.80 | 337.60 | 316.30 | 333.70 | 1,140.40 | 1,203.10 |
| 1976 | 101.40 | 337.60 | 364.00 | 378.80 | 1,214.30 | 1,263.80 |
| 1977 | 107.90 | 337.60 | 412.70 | 422.40 | 1,294.40 | 1,324.40 |
| 1978 | 114.30 | 337.60 | 459.80 | 459.80 | 1,361.70 | 1,361.70 |
| 1979 | 121.80 | 337.60 | 503.40 | 503.40 | 1,399.50 | 1,399.50 |
| 1980 | 133.90 | 337.60 | 572.00 | 572.00 | 1,447.00 | 1,447.00 |
| 1981 | 153.10 | 337.60 | 677.00 | 677.00 | 1,498.40 | 1,498.40 |
| 1982 | ^d 170.30 | 337.60 | ^d 679.30 | ^d 679.30 | 1,351.30 | 1,351.30 |
| 1983 | ^d 166.40 | 307.20 | 709.50 | 709.50 | 1,314.60 | 1,314.60 |
| 1984 | ^d 150.50 | 268.00 | 703.60 | 703.60 | 1,259.40 | 1,259.40 |
| 1985 | ^e | ^e | 717.20 | 717.20 | 1,240.70 | 1,240.70 |
| 1986 | ^e | ^e | 760.10 | 760.10 | 1,275.30 | 1,275.30 |
| 1987 | ^e | ^e | 789.20 | 789.20 | 1,307.30 | 1,307.30 |
| 1988 | ^e | ^e | 838.60 | 838.60 | 1,333.30 | 1,333.30 |
| 1989 | ^e | ^e | 899.60 | 899.60 | 1,375.00 | 1,375.00 |
| 1990 | ^e | ^e | 975.00 | 975.00 | 1,423.70 | 1,423.70 |
| 1991 | ^e | ^e | 1,022.90 | 1,022.90 | 1,417.20 | 1,417.20 |
| 1992 | ^e | ^e | 1,088.70 | 1,088.70 | 1,454.70 | 1,454.70 |
| 1993 | ^e | ^e | 1,128.80 | 1,128.80 | 1,464.40 | 1,464.40 |
| 1994 | ^e | ^e | 1,147.50 | 1,147.50 | 1,450.90 | 1,450.90 |
| 1995 | ^e | ^e | 1,199.10 | 1,199.10 | 1,474.90 | 1,474.90 |
| 1996 | ^e | ^e | 1,248.90 | 1,248.90 | 1,497.30 | 1,497.30 |
| 1997 | ^e | ^e | 1,326.60 | 1,326.60 | 1,545.90 | 1,545.90 |
| 1998 | ^e | ^e | 1,342.80 | 1,342.80 | 1,532.60 | 1,532.60 |
| 1999 | ^e | ^e | 1,373.10 | 1,373.10 | ^f 1,547.10 | ^f 1,547.10 |

(Continued)

Table 2.A28—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 65, by year they attained age 65, 1940–2004 (in dollars)—Continued

| Year ^a | Minimum benefit payable | | Maximum benefit payable | | | |
|-------------------|-------------------------|--------------------------------------|-------------------------|-----------------------|--------------------------------------|----------|
| | At retirement | Effective December 2003 ^b | At retirement | | Effective December 2003 ^b | |
| | | | Men | Women | Men | Women |
| 2000 | e | e | 1,435.30 | 1,435.30 | 1,577.80 | 1,577.80 |
| 2001 | e | e | 1,538.20 | 1,538.20 | 1,633.70 | 1,633.70 |
| 2002 | e | e | 1,660.50 | 1,660.50 | 1,719.00 | 1,719.00 |
| 2003 ^g | e | e | ^g 1,721.70 | ^g 1,721.70 | 1,757.80 | 1,757.80 |
| 2004 | e | e | ^h 1,784.80 | ^h 1,784.80 | ... | ... |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

NOTE: ... = not applicable.

- a. Through 2002, assumptions are that the worker began to work at age 22, retired at the beginning of the year with unreduced benefits, had no earnings after retirement, and had no prior period of disability. Effective 2003, the same assumptions apply except that the benefit is reduced by 2 months, because for a worker retiring at age 65 in 2003, the age at which one can receive an unreduced benefit—the full retirement age (FRA)—has been raised from 65 to 65 and 2 months. In 2004, the FRA is 65 and 4 months, so the benefit is reduced by 4 months.
- 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 December 29, 1981.)
- f. The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.
- g. The full retirement benefit at age 65 and 2 months is \$1,741.10.
- h. The full retirement benefit at age 65 and 4 months is \$1,825.40.

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

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

Table 2.A29—Earnings (retirement) test, by year enacted

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

(Continued)

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

Table 2.A29—Earnings (retirement) test, by year enacted—Continued

| Year enacted | Effective year | Beneficiaries exempt | Earnings subject to test | Amount permitted without reduction in benefits (exempt amount) | | Reduction in monthly benefit ^a |
|--|----------------|----------------------|---------------------------------------|--|--------------------------------------|--|
| | | | | Annual earnings (dollars) | Monthly wages ^b (dollars) | |
| <i>For beneficiaries who have reached full retirement age ^f</i> | | | | | | |
| 1977 | 1978 | ... | ... | ^g 4,000 | ^g 333.33 | \$1 for each \$2 of earnings above \$4,000 |
| | 1979 | | | ^g 4,500 | ^g 375.00 | \$1 for each \$2 of earnings above \$4,500 |
| | 1980 | | | ^g 5,000 | ^g 416.66 | \$1 for each \$2 of earnings above \$5,000 |
| | 1981 | | | ^g 5,500 | ^g 458.33 | \$1 for each \$2 of earnings above \$5,500 |
| | 1982 | | | ^g 6,000 | ^g 500.00 | \$1 for each \$2 of earnings above \$6,000 |
| 1981 | 1983 | Aged 70 or older | Up to age 70 | ... | ... | ... |
| | 1983 | | | ^e 6,600 | ^e 550.00 | \$1 for each \$2 of earnings above \$6,600 |
| | 1984 | | | ^e 6,960 | ^e 580.00 | \$1 for each \$2 of earnings above \$6,960 |
| | 1985 | | | ^e 7,320 | ^e 610.00 | \$1 for each \$2 of earnings above \$7,320 |
| | 1986 | | | ^e 7,800 | ^e 650.00 | \$1 for each \$2 of earnings above \$7,800 |
| | 1987 | | | ^e 8,160 | ^e 680.00 | \$1 for each \$2 of earnings above \$8,160 |
| | 1988 | | | ^e 8,400 | ^e 700.00 | \$1 for each \$2 of earnings above \$8,400 |
| | 1989 | | | ^e 8,880 | ^e 740.00 | \$1 for each \$2 of earnings above \$8,880 |
| 1983 | 1990 | ... | ... | ... | ... | \$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 |
| | 1991 | | | ^e 9,720 | ^e 810.00 | \$1 for each \$3 of earnings above \$9,720 |
| | 1992 | | | ^e 10,200 | ^e 850.00 | \$1 for each \$3 of earnings above \$10,200 |
| | 1993 | | | ^e 10,560 | ^e 880.00 | \$1 for each \$3 of earnings above \$10,560 |
| | 1994 | | | ^e 11,160 | ^e 930.00 | \$1 for each \$3 of earnings above \$11,160 |
| | 1995 | | | ^e 11,280 | ^e 940.00 | \$1 for each \$3 of earnings above \$11,280 |
| 1996 | 1996 | ... | ... | 12,500 | ^h 1,041.67 | \$1 for each \$3 of earnings above \$12,500 |
| | 1997 | | | 13,500 | 1,125.00 | \$1 for each \$3 of earnings above \$13,500 |
| | 1998 | | | 14,500 | ⁱ 1,208.33 | \$1 for each \$3 of earnings above \$14,500 |
| | 1999 | | | 15,500 | ^j 1,291.67 | \$1 for each \$3 of earnings above \$15,500 |
| 2000 | 2000 | ... | EARNINGS TEST ELIMINATED ^k | ... | ... | ... |
| <i>For beneficiaries who will not reach full retirement age during year ^f</i> | | | | | | |
| 2000 | 2000 | ... | ... | ^e 10,080 | ^e 840 | \$1 for each \$2 of earnings above \$10,080 |
| | 2001 | | | ^e 10,680 | ^e 890 | \$1 for each \$2 of earnings above \$10,680 |
| | 2002 | | | ^e 11,280 | ^e 940 | \$1 for each \$2 of earnings above \$11,280 |
| | 2003 | | | ^e 11,520 | ^e 960 | \$1 for each \$2 of earnings above \$11,520 |
| | 2004 | | | ^e 11,640 | ^e 970 | \$1 for each \$2 of earnings above \$11,640 |

(Continued)

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

Table 2.A29—Earnings (retirement) test, by year enacted—Continued

| Year enacted | Effective year | Beneficiaries exempt | Earnings subject to test | Amount permitted without reduction in benefits (exempt amount) | | Reduction in monthly benefit ^a |
|--|----------------|----------------------|--------------------------|--|--------------------------------------|---|
| | | | | Annual earnings (dollars) | Monthly wages ^b (dollars) | |
| For beneficiaries who will reach full retirement age during year ^f | | | | | | |
| 2000 | 2000 | ... | ... | 17,000 | ^l 1,416.67 | \$1 for each \$3 of earnings above \$17,000 |
| | 2001 | | | 25,000 | ^m 2,083.33 | \$1 for each \$3 of earnings above \$25,000 |
| | 2002 | | | 30,000 | 2,500.00 | \$1 for each \$3 of earnings above \$30,000 |
| | 2003 | | | 30,720 | 2,560.00 | \$1 for each \$3 of earnings above \$30,720 |
| | 2004 | | | 31,080 | 2,590.00 | \$1 for each \$3 of earnings above \$31,080 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

NOTE: ... = not applicable.

- a. Earnings of a retired-worker beneficiary affect total monthly family benefit. Earnings of a dependent or survivor beneficiary affect only his or her benefit. However, effective January 1985, earnings of a retired-worker beneficiary do not affect the benefit to a divorced spouse who has been divorced at least 2 years. Effective for benefits after December 1990, the 2-year requirement is waived, if the worker was entitled to benefits before the divorce.
- b. Monthly test for self-employment income is defined in terms of substantial services. For taxable years beginning after December 31, 1977, monthly test eliminated for wage and self-employment income except that each individual may use a monthly test for 1 grace year, usually the year of retirement.
- c. Applied to self-employment income only.
- d. Special provisions for earnings in noncovered employment outside the United States.
- e. Became effective because of automatic adjustment provisions mandated by legislation in 1972 and 1973.
- f. Full retirement age is 65 for beneficiaries who attain age 62 (age 60 for widow(er)s) before 2000, gradually increasing to age 67 for beneficiaries who attain age 62 in 2022 or later.
- g. Discretionary increase included in legislation of 1977.
- 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 (P.L.) 106-182, enacted April 7, 2000, eliminated the earnings test beginning with the month a beneficiary reaches full retirement age (FRA). The annual earnings test that applies in the year of attainment of FRA is based on the annual limits established under P.L. 104-121 (including the \$1 for \$3 withholding rate). In determining annual earnings for purposes of the annual earnings test under this legislation, only earnings before the month of attainment of FRA will be considered. Public Law 106-182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year, which continues to be pegged to increases in the average wage.
- l. Actual amount is \$1,416.66 2/3.
- m. Actual amount is \$2,083.33 1/3.

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

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

Table 2.A30—Monthly earnings guidelines for substantial gainful activity, 1961–2004 (in dollars)

| Year | Nonblind beneficiaries ^a | | Blind beneficiaries ^b |
|-------------------|-------------------------------------|------------------|----------------------------------|
| | Minimum | Maximum | |
| 1961–1965 | 50 | 100 | c |
| 1966–June 1968 | 75 | 125 | c |
| July 1968–1973 | 90 | 140 | c |
| 1974–1975 | 130 | 200 | c |
| 1976 | 150 | 230 | c |
| 1977 | 160 | 240 | c |
| 1978 | 170 | 260 | 334 |
| 1979 | 180 | 280 | 375 |
| 1980 | 190 | 300 | 417 |
| 1981 | 190 | 300 | 459 |
| 1982 | 190 | 300 | 500 |
| 1983–1989 | 190 | 300 | d |
| 1990 | 300 | 500 | 780 |
| 1991 | 300 | 500 | 810 |
| 1992 | 300 | 500 | 850 |
| 1993 | 300 | 500 | 880 |
| 1994 | 300 | 500 | 930 |
| 1995 | 300 | 500 | 940 |
| 1996 | 300 | 500 | 960 |
| 1997 | 300 | 500 | 1,000 |
| 1998 | 300 | 500 | 1,050 |
| January–June 1999 | 300 | 500 | 1,110 |
| July 1999 | 300 | 700 | 1,110 |
| January 2000 | 300 | 700 | 1,170 |
| January 2001 | Discontinued | 740 | 1,240 |
| January 2002 | ... | 780 | 1,300 |
| January 2003 | ... | 800 | 1,330 |
| January 2004 | ... | ^e 810 | ^f 1,350 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2004," *Federal Register*, vol. 68, no. 204 (October 22, 2003).

NOTES: Earnings are net of any wage subsidies and impairment related expenses.

The guidelines for substantial gainful activity (SGA) for self-employed individuals differ from the guidelines for wage earners.

Self-employment activity is generally examined in terms of time spent and degree of effort, as compared with that of nondisabled self-employed individuals.

... = not applicable.

- 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 amendments in 1977 provided that, effective 1978, earnings of blind beneficiaries would be evaluated under different SGA guidelines than are nonblind beneficiaries.
- c. Guidelines pre-1978 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 for the amounts for 1983–1995).
- e. Computed as follows: Nonblind SGA amount for 2000, multiplied by the ratio of the 2003 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 level for 2003, then the level for 2003 would have been used.)
- f. Computed as follows: Blind SGA amount for 1994, multiplied by the ratio of the 2002 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 level for 2003, then the level for 2003 would have been used.)

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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 | Individuals or couples with income exceeding (dollars)— | Benefits included in gross income | Effective for taxable years— |
|---|---|---|-----------------------------------|
| Married filing jointly | | | |
| 1983 | 32,000 | Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits or one-half of income over \$32,000 | Ending after December 31, 1983 |
| 1993 | 32,000 but not 44,000 | Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits or one-half of income over \$32,000 | Beginning after December 31, 1993 |
| | 44,000 | Lesser of 85 percent of Social Security and Tier 1 Railroad Retirement benefits or the sum of \$6,000 plus 85 percent of income over \$44,000 | Beginning after December 31, 1993 |
| Married filing separate returns ^a | | | |
| 1983 | 0 | Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits or one-half of income | Ending after December 31, 1983 |
| 1993 | 0 | Lesser of 85 percent of Social Security and Tier 1 Railroad Retirement benefits or 85 percent of income | Beginning after December 31, 1993 |
| Individuals in all other filing categories | | | |
| 1983 | 25,000 | Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits or one-half of income over \$25,000 | Ending after December 31, 1983 |
| 1993 | 25,000 but not 34,000 | Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits or one-half of income over \$25,000 | Beginning after December 31, 1993 |
| | 34,000 | Lesser of 85 percent of Social Security and Tier 1 Railroad Retirement benefits or the sum of \$4,500 plus 85 percent of income over \$34,000 | Beginning after December 31, 1993 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Taxation of Social Security benefits is governed by the Internal Revenue Service Code. IRS describes the rules governing taxation of Social Security benefits in IRS publication 915, available at <http://www.irs.gov/pub/irs-pdf/p915.pdf>.

NOTES: Income is defined as modified adjusted gross income, plus 50 percent of Social Security and Tier 1 Railroad Retirement benefits. Modified adjusted gross income is adjusted gross income (before Social Security or Railroad Retirement benefits are considered), plus tax-exempt interest income, with further modification of adjusted gross income in some cases involving certain tax provisions of limited applicability among the beneficiary population.

Social Security and Tier 1 Railroad Retirement benefits include workers' compensation benefits to the extent they cause a reduction in Social Security or Tier 1 Railroad Retirement disability benefits.

a. Includes only married taxpayers filing separately who lived with their spouse at any time during the tax year; married individuals filing separately who did not live with their spouse are treated the same as unmarried individuals.

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

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 ^a | Amount of benefits ^b | One-half of benefits ^b | Income to be compared with base amount | Relevant base amount ^c | 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—lessor of one-half of benefits or one-half of income over base amount (K = lesser of C or G) | If income exceeds upper base amount—lessor of 85 percent of benefits or one-half of base amounts plus 85 percent of income over upper base amount (L = lesser of J or I + H) |
| (A) | (B) | (C) | (D = A + C) | (E) | (F = D - E) | (G = F / 2) | (H = .85 F) | (I) | (J = .85 B) | (K) | (L) |
| Married filing jointly | | | | | | | | | | | |
| 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 |
| Married filing separate returns ^d | | | | | | | | | | | |
| 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 |
| Individuals in all other filing categories | | | | | | | | | | | |
| 20,000 | 8,000 | 4,000 | 24,000 | 25,000 | 0 | ... | ... | ... | ... | ... | ... |
| 25,000 | 8,000 | 4,000 | 29,000 | 25,000 | 4,000 | 2,000 | ... | ... | ... | 2,000 | ... |
| 30,000 | 8,000 | 4,000 | 34,000 | 25,000 | 9,000 | 4,500 | ... | ... | ... | 4,000 | ... |
| 32,000 | 8,000 | 4,000 | 36,000 | 34,000 | 2,000 | ... | 1,700 | 4,000 | 6,800 | ... | 5,700 |
| 35,000 | 8,000 | 4,000 | 39,000 | 34,000 | 5,000 | ... | 4,250 | 4,000 | 6,800 | ... | 6,800 |
| 40,000 | 8,000 | 4,000 | 44,000 | 34,000 | 10,000 | ... | 8,500 | 4,000 | 6,800 | ... | 6,800 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Taxation of Social Security benefits is governed by the Internal Revenue Service Code. IRS describes the rules governing taxation of Social Security benefits in IRS publication 915, available at <http://www.irs.gov/pub/irs-pdf/p915.pdf>.

NOTE: ... = not applicable.

- 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.

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

2.B SSI: History of Provisions

Table 2.B1—Federal benefit rates, by living arrangement, 1974–2004

| Act | Effective date | Amount ^a (dollars) | |
|--|------------------------------|-------------------------------|--------|
| | | Individual | Couple |
| Own household ^b | | | |
| 1972 | January 1, 1974 ^c | 130.00 | 195.00 |
| 1973 | January 1, 1974 | 140.00 | 210.00 |
| 1973 | July 1, 1974 | 146.00 | 219.00 |
| 1974 ^d | July 1, 1975 | 157.70 | 236.60 |
| | July 1, 1976 | 167.80 | 251.80 |
| | July 1, 1977 | 177.70 | 266.70 |
| | July 1, 1978 | 189.40 | 284.10 |
| | July 1, 1979 | 208.20 | 312.30 |
| | July 1, 1980 | 238.00 | 357.00 |
| | July 1, 1981 | 264.70 | 397.00 |
| 1983 | July 1, 1982 | 284.30 | 426.40 |
| | July 1, 1983 ^e | 304.30 | 456.40 |
| | January 1, 1984 | 314.00 | 472.00 |
| | January 1, 1985 | 325.00 | 488.00 |
| | January 1, 1986 | 336.00 | 504.00 |
| | January 1, 1987 | 340.00 | 510.00 |
| | January 1, 1988 | 354.00 | 532.00 |
| | January 1, 1989 | 368.00 | 553.00 |
| | January 1, 1990 | 386.00 | 579.00 |
| | January 1, 1991 | 407.00 | 610.00 |
| | January 1, 1992 | 422.00 | 633.00 |
| | January 1, 1993 | 434.00 | 652.00 |
| | January 1, 1994 | 446.00 | 669.00 |
| | January 1, 1995 | 458.00 | 687.00 |
| | January 1, 1996 | 470.00 | 705.00 |
| | January 1, 1997 | 484.00 | 726.00 |
| | January 1, 1998 | 494.00 | 741.00 |
| January 1, 1999 | 500.00 | 751.00 | |
| January 1, 2000 | ^f 513.00 | 769.00 | |
| January 1, 2001 | ^f 531.00 | 796.00 | |
| January 1, 2002 | 545.00 | 817.00 | |
| January 1, 2003 | 552.00 | 829.00 | |
| January 1, 2004 | 564.00 | 846.00 | |
| Receiving institutional care covered by Medicaid ^g | | | |
| 1972 | January 1, 1974 | 25.00 | 50.00 |
| 1987 | July 1, 1988 | 30.00 | 60.00 |

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2003; regulations issued under the Act; and precedential case decisions (rulings). Specific laws, regulations, rulings, legislation, and a link to the *Federal Register* can be found at <http://www.socialsecurity.gov/regulations/index.htm>. Social Security Administration, Office of the Chief Actuary, "SSI Federal Payment Amounts," <http://www.socialsecurity.gov/OACT/COLA/SSlams.html>.

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

- a. For those without countable income. These payments are reduced by the amount of countable income of the individual or couple.
- b. Includes persons in private institutions whose care is not provided by Medicaid.
- c. Superseded by the provision of 1973.
- d. Mechanism established for providing cost-of-living adjustments.
- e. General benefit increase.
- f. Benefits originally paid in 2000 and through July 2001 were based on federal benefit rates of \$512.00 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 on the basis of an adjusted benefit rate for months prior to August 2001.
- g. Must be receiving more than 50 percent of the cost of the care from Medicaid (Title XIX of the Social Security Act).

CONTACT: Alfreda Brooks (410) 965-9849.

Table 2.C1—Medicare cost sharing and premium amounts, 1966–2005

| Effective date ^a | Hospital Insurance (Medicare Part A) | | | | Supplementary Medical Insurance (Medicare Part B) ^b | | | | | | | |
|-----------------------------|--|--|---|--|--|---|---------------------------------------|--|-------------------------|--------|------|-----------------------|
| | All expenses in "benefit period" covered except— | | | | Monthly premium ^c (dollars) | Annual deductible ^d (dollars) | Coinsurance ^d (percent) | 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 ^{e,f} (aged and disabled) | Government amounts for— | | Aged | Disabled ^f |
| | | Days 61 through 90 (1/4 X IHD) (dollars) | Lifetime reserve days after 90 days (1/2 X IHD) | | | | | | | | | |
| 1966 | 40 | 10 | g | g | ... | 50 | 20 | 3.00 | 3.00 | ... | | |
| 1967 | 40 | 10 | g | 5.00 | ... | 50 | 20 | 3.00 | 3.00 | ... | | |
| 1968 | 40 | 10 | 20 | 5.00 | ... | ^h 50 | ^h 20 | ⁱ 4.00 | ⁱ 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 | ^j 20 | 5.80 | 5.80 | ... | | |
| 1973 | 72 | 18 | 36 | 9.00 | 33 | 60 | 20 | ^k 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 | ^{l,m} 60 | ^m 20 | 11.00 | 34.20 | 62.20 | | |
| 1982 | 260 | 65 | 130 | 32.50 | 113 | ⁿ 75 | ⁿ 20 | 12.20 | 37.00 | 72.00 | | |
| 1983 | 304 | 76 | 152 | 38.00 | 113 | 75 | 20 | 12.20 | 41.80 | 80.00 | | |
| 1984 | 356 | 89 | 178 | 44.50 | 155 | 75 | 20 | 14.60 | 43.80 | 94.00 | | |
| 1985 | 400 | 100 | 200 | 50.00 | 174 | 75 | 20 | 15.50 | 46.50 | 89.90 | | |
| 1986 | 492 | 123 | 246 | 61.50 | 214 | 75 | 20 | 15.50 | 46.50 | 66.10 | | |
| 1987 | 520 | 130 | 260 | 65.00 | 226 | 75 | 20 | 17.90 | 53.70 | 88.10 | | |
| 1988 | 540 | 135 | 270 | 67.50 | 234 | 75 | 20 | 24.80 | 74.40 | 72.40 | | |
| 1989 | ^o 560 | ^o | ^o | ^p 25.50 | 156 | 75 | 20 | ^q 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 | ^r 245 | 100 | 20 | 41.10 | 82.50 | 111.10 | | |
| 1995 | 716 | 179 | 358 | 89.50 | ^r 261 | 100 | 20 | 46.10 | 100.10 | 165.50 | | |
| 1996 | 736 | 184 | 368 | 92.00 | ^r 289 | 100 | 20 | 42.50 | 127.30 | 167.70 | | |
| 1997 | 760 | 190 | 380 | 95.00 | ^r 311 | 100 | 20 | 43.80 | 131.40 | 177.00 | | |
| 1998 | 764 | 191 | 382 | 95.50 | ^r 309 | 100 | 20 | 43.80 | 132.00 | 150.40 | | |
| 1999 | 768 | 192 | 384 | 96.00 | ^r 309 | 100 | 20 | 45.50 | 139.10 | 160.50 | | |

(Continued)

2.C Medicare: History of Provisions

Table 2.C1—Medicare cost sharing and premium amounts, 1966–2005—Continued

| Effective date ^a | Hospital Insurance (Medicare Part A) | | | | | Supplementary Medical Insurance (Medicare Part B) ^b | | | | | |
|-----------------------------|--|--|---|--|--|--|---|---------------------------------------|---------------------------|-----------------------|--|
| | All expenses in "benefit period" covered except— | | | | | Monthly premium ^c (dollars) | Annual deductible ^d (dollars) | Coinsurance ^d (percent) | 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 ^{e,f} (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 ^f | |
| 2000 | 776 | 194 | 388 | 97.00 | 301 | 100 | 20 | 45.50 | 138.30 | 196.70 | |
| 2001 | 792 | 198 | 396 | 99.00 | 300 | 100 | 20 | 50.00 | 152.00 | 214.40 | |
| 2002 | 812 | 203 | 406 | 101.50 | 319 | 100 | 20 | 54.00 | 164.60 | 192.20 | |
| 2003 | 840 | 210 | 420 | 105.00 | 316 | 100 | 20 | 58.70 | 178.70 | 223.30 | |
| 2004 | 876 | 219 | 438 | 109.50 | 343 | 100 | 20 | 66.60 | 199.80 | 284.40 | |
| 2005 | 912 | 228 | 456 | 114.00 | 375 | 110 | 20 | 78.20 | 234.60 | 305.40 | |

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: . . . = not applicable.

- a. The deductible and coinsurance amounts begin in January unless otherwise noted. The monthly premium amounts were effective in July through 1983 and in January for 1984 and succeeding years.
- b. Supplementary Medical Insurance (SMI) is composed of Medicare Part B and, beginning in 2004, Medicare Part D. However, for the years shown, the Part D program is in a transitional stage, with premiums and deductibles not applicable until 2006.
- c. Standard premium rate paid for voluntary enrollment by certain aged and disabled individuals not otherwise entitled to Hospital Insurance (HI). (Most individuals aged 65 and older and many disabled individuals under age 65 are insured for HI benefits without payment of any premium.) In certain cases, a surcharge applies for those beneficiaries who enroll after their initial enrollment period.
- d. Most (but not all) services under Part B are subject to the annual deductible amounts and coinsurance percentages shown. (Original sources of authority, such as the laws, regulations, and rulings for Part B, should be consulted if specific details are required.)
- e. Standard premium rate paid by most Part B enrollees. However, two provisions alter the premium rate for certain Part B enrollees. First, in most cases, there is a surcharge for those beneficiaries who enroll after their initial enrollment period. Second, a "hold-harmless" provision lowers the premium rate for certain individuals who have their premium deducted from their Social Security check. On an individual basis, this provision limits the dollar increase in the Part B premium to the dollar increase in the individual's Social Security check. As a result, the person affected pays a lower Part B premium, and the net amount of the individual's Social Security check does not decrease, despite the greater increase in the premium. (A third premium-altering provision is scheduled to take effect in 2007.)
- f. Beginning in July 1973 for the disabled.
- g. Benefit not provided.
- h. Professional inpatient services of pathologists and radiologists not subject to deductible or coinsurance, beginning in April 1968.
- i. Beginning in April 1968.
- j. Home health services not subject to coinsurance, beginning in January 1973.
- k. Monthly premium for July and August 1973 was reduced to \$5.80 and \$6.10, respectively, by the Cost of Living Council.
- l. Home health services not subject to deductible.
- m. Professional inpatient services of pathologists and radiologists not subject to deductible or coinsurance, beginning in April 1968, but only when physician accepts assignment.
- n. Effective October 1, 1982, professional inpatient services of pathologists and radiologists are subject to deductible and coinsurance.
- o. 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).
- p. 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.
- q. Includes the standard monthly Part B premium and a supplemental monthly flat premium under the Medicare Catastrophic Coverage Act of 1988. Amount shown is for most Part B enrollees. Residents of Puerto Rico and other territories and commonwealths, as well as persons enrolled in Part B only, paid different supplemental flat premiums, resulting in a smaller premium than that shown.
- r. 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, \$174, \$189, and \$206 for 1994 to 2005, respectively.

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, 2003–2005

| State or area | Federal medical assistance percentage ^a | | | Enhanced federal medical assistance percentage ^b | |
|----------------------|--|-------------------|-------------------|---|-------|
| | 2003 ^c | 2004 ^d | 2005 ^e | 2004 | 2005 |
| Alabama | 70.60 | 70.75 | 70.83 | 79.53 | 79.58 |
| Alaska | 58.27 | 58.39 | 57.58 | 70.87 | 70.31 |
| Arizona | 67.25 | 67.62 | 67.45 | 77.08 | 77.22 |
| Arkansas | 74.28 | 74.67 | 74.75 | 82.27 | 82.33 |
| California | 50.00 | 50.00 | 50.00 | 65.00 | 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 | 50.38 | 65.00 | 65.27 |
| District of Columbia | 70.00 | 70.00 | 70.00 | 79.00 | 79.00 |
| Florida | 58.83 | 58.93 | 58.90 | 71.25 | 71.23 |
| Georgia | 59.60 | 59.58 | 60.44 | 71.71 | 72.31 |
| Hawaii | 58.77 | 58.90 | 58.47 | 71.23 | 70.93 |
| Idaho | 70.96 | 70.46 | 70.62 | 79.32 | 79.43 |
| Illinois | 50.00 | 50.00 | 50.00 | 65.00 | 65.00 |
| Indiana | 61.97 | 62.32 | 62.78 | 73.62 | 73.95 |
| Iowa | 63.50 | 63.93 | 63.55 | 74.75 | 74.49 |
| Kansas | 60.15 | 60.82 | 61.01 | 72.57 | 72.71 |
| Kentucky | 69.89 | 70.09 | 69.60 | 79.06 | 78.72 |
| Louisiana | 71.28 | 71.63 | 71.04 | 80.14 | 79.73 |
| Maine | 66.22 | 66.01 | 64.89 | 76.21 | 75.42 |
| Maryland | 50.00 | 50.00 | 50.00 | 65.00 | 65.00 |
| Massachusetts | 50.00 | 50.00 | 50.00 | 65.00 | 65.00 |
| Michigan | 55.42 | 55.89 | 56.71 | 69.12 | 69.70 |
| Minnesota | 50.00 | 50.00 | 50.00 | 65.00 | 65.00 |
| Mississippi | 76.62 | 77.08 | 77.08 | 83.96 | 83.96 |
| Missouri | 61.23 | 61.47 | 61.15 | 73.03 | 72.81 |
| Montana | 72.96 | 72.85 | 71.90 | 81.00 | 80.33 |
| Nebraska | 59.52 | 59.89 | 59.64 | 71.92 | 71.75 |
| Nevada | 52.39 | 54.93 | 55.90 | 68.45 | 69.13 |
| 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 | 74.56 | 74.85 | 74.30 | 82.40 | 82.01 |
| New York | 50.00 | 50.00 | 50.00 | 65.00 | 65.00 |
| North Carolina | 62.56 | 62.85 | 63.63 | 74.00 | 74.54 |
| North Dakota | 68.36 | 68.31 | 67.49 | 77.82 | 77.24 |
| Ohio | 58.83 | 59.23 | 59.68 | 71.46 | 71.78 |
| Oklahoma | 70.56 | 70.24 | 70.18 | 79.17 | 79.13 |
| Oregon | 60.16 | 60.81 | 61.12 | 72.57 | 72.78 |
| Pennsylvania | 54.69 | 54.76 | 53.84 | 68.33 | 67.69 |
| Rhode Island | 55.40 | 56.03 | 55.38 | 69.22 | 68.77 |
| South Carolina | 69.81 | 69.86 | 69.89 | 78.90 | 78.92 |
| South Dakota | 65.29 | 65.67 | 66.03 | 75.97 | 76.22 |
| Tennessee | 64.59 | 64.40 | 64.81 | 75.08 | 75.37 |
| Texas | 59.99 | 60.22 | 60.87 | 72.15 | 72.61 |
| Utah | 71.24 | 71.72 | 72.14 | 80.20 | 80.50 |
| Vermont | 62.41 | 61.34 | 60.11 | 72.94 | 72.08 |
| Virginia | 50.53 | 50.00 | 50.00 | 65.00 | 65.00 |
| Washington | 50.00 | 50.00 | 50.00 | 65.00 | 65.00 |
| West Virginia | 75.04 | 75.19 | 74.65 | 82.63 | 82.26 |
| Wisconsin | 58.43 | 58.41 | 58.31 | 70.89 | 70.82 |
| Wyoming | 61.32 | 59.77 | 57.90 | 71.84 | 70.53 |

(Continued)

2.C Medicaid: History of Provisions

Table 2.C2—Federal medical assistance percentage and enhanced federal medical assistance percentage, by state or other area, 2003–2005—Continued

| State or area | Federal medical assistance percentage ^a | | | Enhanced federal medical assistance percentage ^b | |
|--------------------------|--|--------------------|--------------------|---|--------------------|
| | 2003 ^c | 2004 ^d | 2005 ^e | 2004 | 2005 |
| Outlying areas | | | | | |
| American Samoa | ^f 50.00 | ^f 50.00 | ^f 50.00 | ^f 65.00 | ^f 65.00 |
| Guam | ^f 50.00 | ^f 50.00 | ^f 50.00 | ^f 65.00 | ^f 65.00 |
| Northern Mariana Islands | ^f 50.00 | ^f 50.00 | ^f 50.00 | ^f 65.00 | ^f 65.00 |
| Puerto Rico | ^f 50.00 | ^f 50.00 | ^f 50.00 | ^f 65.00 | ^f 65.00 |
| Virgin Islands | ^f 50.00 | ^f 50.00 | ^f 50.00 | ^f 65.00 | ^f 65.00 |

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

- Section 1905(b) of the Social Security Act (the Act) specifies the method to be used to compute the federal medical assistance percentage. From this section the following formula is derived: $N = 3\text{-year average national per capita personal income}$; $S = 3\text{-year average state per capita personal income}$. Federal medical assistance percentage: $\text{State share} = (S^2/N^2) \times 45$ or $(45/N^2) \times S^2$; $\text{Federal share} = 100 - \text{state share}$ with 50–83 percent limits.
- This is the Title XXI enhanced federal medical assistance percentage rate specified in section 2105(b) of the Act. The enhanced federal medical assistance percentage is limited to no more than 85 percent.
- Effective October 1, 2002, through September 30, 2003.
- Effective October 1, 2003, through September 30, 2004.
- Effective October 1, 2004, through September 30, 2005.
- For purposes of section 1118 of the Social Security Act, the federal medical assistance percentage used under titles I, X, XIV, and XVI, and part A of title IV will be 75 percent.

CONTACT: Adelle Simmons (202) 401-6119.

Table 2.F1—Number of SSA offices, 2003

| Office | Number |
|---------------------------------------|--------|
| Headquarters (Baltimore, Maryland) | 1 |
| Regional offices ^a | 10 |
| Field offices ^b | 1,329 |
| Level 1 | 615 |
| Level 2 | 667 |
| Resident stations | 47 |
| Teleservice centers | 36 |
| Program service centers ^c | 6 |
| Data operations center ^d | 1 |
| Office of Hearings and Appeals | |
| Headquarters (Falls Church, Virginia) | 1 |
| Regional offices | 10 |
| Hearing offices | 140 |
| Satellite offices | 4 |

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

- a. Regional offices are located in Boston, Massachusetts; New York, New York; Philadelphia, Pennsylvania; Atlanta, Georgia; Chicago, Illinois; Dallas, Texas; Kansas City, Missouri; Denver, Colorado; San Francisco, California; and Seattle, Washington.
- b. In December 1997, the field offices were redesignated as Level 1, 2, or resident stations depending on the characteristics of the facility, service area, and other conditions.
- c. Program service centers are located in Jamaica, New York; Philadelphia, Pennsylvania; Birmingham, Alabama; Chicago, Illinois; Kansas City, Missouri; and Richmond, California.
- d. The data operations center is located in Wilkes-Barre, Pennsylvania.

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

2.F SSA Administrative Data: Offices and Staff

Table 2.F2—Number of SSA employees and percentage with selected characteristics by grade, September 30, 2003

| Characteristic | All grade levels | GS 1–4 | GS 5–8 | GS 9–12 | GS 13–15 | SES |
|----------------------------------|----------------------------|--------|--------|---------|----------|------|
| | <i>Number</i> | | | | | |
| Total ^a | 65,191 | 1,107 | 21,434 | 32,816 | 8,308 | 132 |
| | <i>Percentage of total</i> | | | | | |
| Women | 70.6 | 76.5 | 79.2 | 72.5 | 50.4 | 34.8 |
| Minorities | 43.9 | 49.5 | 57.0 | 40.7 | 26.3 | 28.0 |
| Black | 27.3 | 39.8 | 34.8 | 25.0 | 17.9 | 20.5 |
| Hispanic | 11.9 | 6.6 | 16.4 | 11.2 | 5.1 | 6.8 |
| Asian or Pacific Islander | 3.5 | 2.0 | 4.7 | 3.2 | 2.2 | 0.8 |
| American Indian or Alaska Native | 1.2 | 1.1 | 1.2 | 1.2 | 1.1 | 0.0 |
| Severely disabled | 2.3 | 9.1 | 3.8 | 1.4 | 0.9 | 0.8 |

SOURCE: Social Security Administration's Affirmative Employment Plan.

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

CONTACT: Nelson Izquierdo (410) 965-4364.

Table 2.F3—Number of work years, fiscal years 1993–2003

| Year | Full-time permanent staff ^a | Total work years ^b |
|-------------------|--|-------------------------------|
| 1993 | 61,640 | 66,623 |
| 1994 | 62,434 | 66,741 |
| 1995 ^c | 62,504 | 67,063 |
| 1996 | 62,133 | 66,726 |
| 1997 | 61,224 | 69,378 |
| 1998 | 59,943 | 67,210 |
| 1999 | 59,752 | 66,459 |
| 2000 | 60,434 | 65,521 |
| 2001 | 61,490 | 65,562 |
| 2002 | 61,914 | 65,742 |
| 2003 | 63,569 | 65,343 |

SOURCE: Social Security Administration's Payroll Reports.

a. On duty at end of fiscal year; includes seasonal employees.

b. Includes full-time, part-time, and temporary employees; employees in special programs; and overtime hours worked.

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

CONTACT: Donna Frocke (410) 965-3094.

Table 2.F4—Number of Old-Age and Survivors Insurance claims, fiscal year 2003 (in thousands)

| Workload | Total | Worker | Family members and survivors |
|---------------------------|---------|---------|------------------------------|
| Beginning-of-year pending | 120.1 | 52.1 | 68.0 |
| Received | 3,200.7 | 1,767.5 | 1,433.2 |
| Processed ^a | 3,240.1 | 1,784.5 | 1,455.6 |
| End-of-year pending | 80.7 | 35.1 | 45.6 |

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

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

CONTACT: Shirley Hodges (410) 965-0635.

Table 2.F5—Number of Disability Insurance claims, fiscal year 2003 (in thousands)

| Workload | Total | Worker | Family members and survivors |
|---------------------------|---------|---------|------------------------------|
| Beginning-of-year pending | 528.5 | 503.0 | 25.5 |
| Received | 2,185.7 | 1,934.9 | 250.8 |
| Processed ^a | 2,209.8 | 1,952.6 | 257.2 |
| End-of-year pending | 504.4 | 485.3 | 19.1 |

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

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

CONTACT: Shirley Hodges (410) 965-0635.

Table 2.F6—Number of Supplemental Security Income claims, fiscal year 2003 (in thousands)

| Workload | Total | Aged | Blind or disabled |
|---------------------------|---------|-------|-------------------|
| Beginning-of-year pending | 447.6 | 4.0 | 443.6 |
| Received | 2,161.6 | 173.6 | 1,988.0 |
| Processed ^a | 2,142.4 | 173.4 | 1,969.0 |
| End-of-year pending | 466.8 | 4.2 | 462.6 |

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

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

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 1998–2003

| Item | 1999 | 2000 | 2001 | 2002 | 2003 |
|---|------|------|------|------|------|
| <i>Accuracy rates (percent)</i> | | | | | |
| OASI payments | | | | | |
| Index of dollar accuracy | 99.6 | 99.6 | 99.9 | a | a |
| Payment review/stewardship results | | | | | |
| Excess payments | 99.8 | 99.9 | 99.9 | 99.9 | 99.9 |
| Underpayments | 99.9 | 99.9 | 99.8 | 99.9 | 99.9 |
| SSI payments ^b | | | | | |
| Index of dollar accuracy ^c | 94.2 | 94.0 | 91.4 | a | a |
| Payment review/stewardship results ^d | | | | | |
| Excess payments | 94.3 | 94.7 | 93.3 | 93.4 | 93.9 |
| Underpayments | 98.3 | 98.6 | 98.8 | 98.6 | 98.8 |
| Disability Insurance benefits ^e | | | | | |
| Initial claims | 94.3 | 94.2 | 93.9 | 94.2 | 93.3 |
| Allowances | 96.5 | 97.0 | 96.8 | 97.1 | 96.6 |
| Denials | 93.0 | 92.4 | 92.0 | 92.4 | 91.5 |
| Reconsideration | 92.3 | 92.2 | 91.0 | 90.5 | 90.9 |
| Reversals of denials | 96.0 | 96.9 | 96.8 | 95.9 | 96.6 |
| Affirmations of denials | 91.6 | 91.3 | 89.9 | 89.4 | 89.9 |
| <i>National 800 number network (1-800-772-1213)</i> | | | | | |
| Number of calls received (millions) | 78.7 | 76.3 | 74.8 | 62.3 | 64.0 |
| Average time calls answered (minutes) | 2.0 | 2.5 | 2.8 | 4.7 | 3.8 |

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

- a. OASI and SSI Index of Dollar Accuracy Reviews were terminated in 2003.
- b. Excludes determinations of disability.
- c. Prior to fiscal year 1999, percentages exclude errors of less than \$5. Any payments to ineligible beneficiaries are included regardless of the dollar amount of the error.
- d. Beginning with fiscal year 2000, the SSI payment review/stewardship results are reported as the percentage of payments free of preventable error.
- e. Represents cases free of decisional and documentation errors.

CONTACT: Bob Marks (410) 965-4527 or John Hebert (410) 965-3915.

2.F SSA Administrative Data: Hearings and Appeals

Table 2.F8—Workload of SSA’s Administrative Law Judges (ALJs), fiscal years 2002–2004

| Item | 2002 | 2003 | 2004 ^a |
|--|------|------|-------------------|
| Number of ALJs | 969 | 975 | 944 |
| Average monthly hearing dispositions per ALJ | 45 | 49 | 52 |
| Average hearings pending per ALJ | 470 | 581 | 682 |

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: Data based on Administrative Law Judges’ availability during fiscal year 2002; data excludes Regional Chief ALJs.

a. Estimated data.

CONTACT: Beverly Nateghi (703) 605-8788.

Table 2.F9—Number of hearing receipts, dispositions, and end-of-year pending cases, fiscal years 2003–2004

| Program | Hearing receipts | | Hearing dispositions | | End-of-year pending cases | |
|--|------------------|-------------------|----------------------|-------------------|---------------------------|-------------------|
| | 2003 | 2004 ^a | 2003 | 2004 ^a | 2003 | 2004 ^a |
| Total | 662,733 | 640,308 | 571,928 | 588,300 | 591,562 | 643,570 |
| OASI | 3,097 | 3,237 | 2,717 | 3,236 | 3,231 | 3,350 |
| Disability | | | | | | |
| DI | 226,881 | 210,821 | 183,640 | 203,529 | 201,317 | 215,763 |
| SSI | 165,896 | 172,437 | 149,715 | 167,360 | 165,997 | 168,572 |
| DI and SSI | 191,365 | 181,813 | 157,849 | 164,175 | 185,824 | 198,692 |
| Medicare (Parts A and B and adversarial) | 75,493 | 72,000 | 78,005 | 50,000 | 35,193 | 57,193 |
| Black Lung | 1 | 0 | 2 | 0 | 0 | 0 |

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.

a. Estimated data.

CONTACT: Beverly Nateghi (703) 605-8788.

Table 2.F11—Number of SSA Appeals Council cases, fiscal years 2002–2004

| Cases | 2002 | 2003 | 2004 ^a |
|---------------------------|---------|---------|-------------------|
| Beginning-of-year pending | 92,185 | 59,781 | 51,078 |
| Receipts | 83,063 | 92,047 | 97,925 |
| Dispositions | 115,467 | 100,750 | 96,949 |
| End-of-year pending | 59,781 | 51,078 | 52,054 |

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.

a. Estimated data.

CONTACT: Beverly Nateghi (703) 605-8788.

Section 3. Social Welfare and the Economy

| | |
|--------------------------------|-------------|
| Employment and Earnings | 3.1 |
| Interprogram Data | 3.3 |
| Poverty | 3.13 |

Table 3.B3—Federal minimum wage rates under the Fair Labor Standards Act of 1938 and average hourly earnings and average weekly hours for production workers in manufacturing, selected years 1938–2003

| Effective date | Minimum hourly wage for workers in jobs first covered by— | | | | Production workers in manufacturing ^a | |
|--------------------------------|--|---|---|-------------------|---|-------------------------|
| | 1938 act ^b (dollars) | 1961 amendments ^c (dollars) | 1966 and subsequent amendments ^d | | Average gross hourly earnings (dollars) | Average weekly hours |
| | | | Nonfarm (dollars) | Farm (dollars) | | |
| October 24 1938 | 0.25 | ... | ... | ... | 0.62 | 35.6 |
| 1939 | 0.30 | ... | ... | ... | 0.63 | 37.7 |
| 1945 | 0.40 | ... | ... | ... | 1.02 | 43.5 |
| January 25, 1950 | 0.75 | ... | ... | ... | 1.44 | 40.5 |
| March 1, 1956 | 1.00 | ... | ... | ... | 1.95 | 40.4 |
| September 3 1961 | 1.15 | 1.00 | ... | ... | 2.32 | 39.8 |
| 1963 | 1.25 | 1.00 | ... | ... | 2.46 | 40.5 |
| 1964 | 1.25 | 1.15 | ... | ... | 2.53 | 40.7 |
| 1965 | 1.25 | 1.25 | ... | ... | 2.61 | 41.2 |
| February 1 1967 | 1.40 | 1.40 | 1.00 | 1.00 | 2.83 | 40.6 |
| 1968 | 1.60 | 1.60 | 1.15 | 1.15 | 3.01 | 40.7 |
| 1969 | 1.60 | 1.60 | 1.30 | 1.30 | 3.19 | 40.6 |
| 1970 | 1.60 | 1.60 | 1.45 | 1.30 | 3.36 | 39.8 |
| 1971 | 1.60 | 1.60 | 1.60 | 1.30 | 3.57 | 39.9 |
| May 1, 1974 | 2.00 | 2.00 | 1.90 | 1.60 | 4.42 | 40.0 |
| January 1 1975 | 2.10 | 2.10 | 2.00 | 1.80 | 4.83 | 39.5 |
| 1976 | 2.30 | 2.30 | 2.20 | 2.00 | 5.22 | 40.1 |
| 1977 | 2.30 | 2.30 | 2.30 | 2.20 | 5.68 | 40.3 |
| 1978 | 2.65 | 2.65 | 2.65 | 2.65 | 6.17 | 40.4 |
| 1979 | 2.90 | 2.90 | 2.90 | 2.90 | 6.70 | 40.2 |
| 1980 | 3.10 | 3.10 | 3.10 | 3.10 | 7.27 | 39.7 |
| 1981 | 3.35 | 3.35 | 3.35 | 3.35 | 7.99 | 39.8 |
| 1982 | 3.35 | 3.35 | 3.35 | 3.35 | 8.49 | 38.9 |
| 1983 | 3.35 | 3.35 | 3.35 | 3.35 | 8.83 | 40.1 |
| 1984 | 3.35 | 3.35 | 3.35 | 3.35 | 9.19 | 40.7 |
| 1985 | 3.35 | 3.35 | 3.35 | 3.35 | 9.54 | 40.5 |
| 1986 | 3.35 | 3.35 | 3.35 | 3.35 | 9.73 | 40.7 |
| 1987 | 3.35 | 3.35 | 3.35 | 3.35 | 9.91 | 41.0 |
| 1988 | 3.35 | 3.35 | 3.35 | 3.35 | 10.19 | 41.1 |
| 1989 | 3.35 | 3.35 | 3.35 | 3.35 | 10.48 | 41.0 |
| April 1 1990 ^e | 3.80 | 3.80 | 3.80 | 3.80 | 10.83 | 40.8 |
| 1991 ^e | 4.25 | 4.25 | 4.25 | 4.25 | 11.18 | 40.7 |
| 1992 ^e | 4.25 | 4.25 | 4.25 | 4.25 | 11.46 | 41.0 |
| 1993 ^e | 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 ^e | 4.75 | 4.75 | 4.75 | 4.75 | 12.77 | 41.6 |
| September 1, 1997 ^e | 5.15 | 5.15 | 5.15 | 5.15 | 13.17 | 42.0 |

(Continued)

3.B Employment and Earnings

Table 3.B3—Federal minimum wage rates under the Fair Labor Standards Act of 1938 and average hourly earnings and average weekly hours for production workers in manufacturing, selected years 1938–2003—Continued

| Effective date | Minimum hourly wage for workers in jobs first covered by— | | | | Production workers in manufacturing ^a | |
|-------------------|--|---|---|-------------------|---|-------------------------|
| | 1938 act ^b (dollars) | 1961 amendments ^c (dollars) | 1966 and subsequent amendments ^d | | Average gross hourly earnings (dollars) | Average weekly hours |
| | | | Nonfarm (dollars) | Farm (dollars) | | |
| January 1 | | | | | | |
| 1998 ^e | 5.15 | 5.15 | 5.15 | 5.15 | 13.45 | 41.4 |
| 1999 ^e | 5.15 | 5.15 | 5.15 | 5.15 | 13.85 | 41.4 |
| 2000 ^e | 5.15 | 5.15 | 5.15 | 5.15 | 14.32 | 41.3 |
| 2001 ^e | 5.15 | 5.15 | 5.15 | 5.15 | 14.76 | 40.3 |
| 2002 ^e | 5.15 | 5.15 | 5.15 | 5.15 | 15.29 | 40.5 |
| 2003 ^e | 5.15 | 5.15 | 5.15 | 5.15 | 15.74 | 40.4 |

SOURCE: Department of Labor, Bureau of Labor Statistics.

NOTE: . . . = not applicable.

- 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.

CONTACT: Greg Diez (410) 965-0153.

Table 3.C3—Contributions to the Social Security and Medicare trust funds, by program and source, selected years 1965–2003 (in millions of dollars)

| Program and source | 1965 | 1970 | 1975 | 1980 | 1985 | 1990 | 1995 | 1999 | 2000 | 2001 | 2002 | 2003 |
|--|--------|--------|--------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Social Security trust funds | | | | | | | | | | | | |
| Old-Age and Survivors Insurance ^a | 16,017 | 30,257 | 56,815 | 103,456 | 178,010 | 270,507 | 309,906 | 407,023 | 432,977 | 453,354 | 468,107 | 468,574 |
| Employer | 7,618 | 14,489 | 27,184 | 49,731 | 83,682 | 125,272 | 143,978 | 188,461 | 200,431 | 210,659 | 215,897 | 217,675 |
| Employee | 7,440 | 14,204 | 26,947 | 49,436 | 83,400 | 124,481 | 143,335 | 187,160 | 198,736 | 207,999 | 215,039 | 216,222 |
| Self-employed | 959 | 1,564 | 2,684 | 4,289 | 7,720 | 15,906 | 17,103 | 20,503 | 22,216 | 22,793 | 24,262 | 22,179 |
| Taxation of benefits | ... | ... | ... | ... | 3,208 | 4,848 | 5,490 | 10,899 | 11,594 | 11,903 | 12,909 | 12,497 |
| Disability Insurance ^a | 1,188 | 4,481 | 7,444 | 13,255 | 17,204 | 28,498 | 54,695 | 63,827 | 71,813 | 75,743 | 78,202 | 78,386 |
| Employer | 564 | 2,154 | 3,562 | 6,307 | 8,119 | 13,414 | 25,665 | 29,936 | 33,971 | 35,759 | 36,655 | 36,962 |
| Employee | 551 | 2,117 | 3,530 | 6,254 | 8,087 | 13,338 | 25,545 | 29,730 | 33,701 | 35,312 | 36,503 | 36,716 |
| Self-employed | 73 | 210 | 352 | 694 | 776 | 1,602 | 3,144 | 3,500 | 3,420 | 3,861 | 4,114 | 3,764 |
| Taxation of benefits | ... | ... | ... | ... | 222 | 144 | 341 | 661 | 721 | 811 | 930 | 944 |
| Medicare trust funds | | | | | | | | | | | | |
| Hospital Insurance ^a | ... | 4,880 | 11,510 | 23,866 | 47,173 | 71,753 | 103,301 | 140,306 | 154,520 | 160,896 | 162,650 | 159,164 |
| Employer | ... | 2,379 | 5,578 | 11,591 | 22,613 | 33,850 | 45,839 | 61,826 | 67,526 | 71,181 | 71,334 | 69,885 |
| Employee | ... | 2,332 | 5,530 | 11,518 | 22,549 | 33,635 | 45,852 | 61,826 | 67,526 | 71,181 | 71,334 | 69,885 |
| Self-employed | ... | 169 | 395 | 739 | 1,970 | 4,146 | 6,743 | 8,655 | 9,299 | 9,631 | 10,040 | 9,472 |
| Voluntarily enrolled ^b | ... | ... | 7 | 18 | 41 | 122 | 954 | 1,447 | 1,382 | 1,370 | 1,626 | 1,604 |
| Taxation of benefits | ... | ... | ... | ... | ... | ... | 3,913 | 6,552 | 8,787 | 7,533 | 8,316 | 8,318 |
| Supplementary Medical Insurance ^{a,c} | ... | 1,096 | 1,917 | 3,011 | 5,613 | 11,319 | 19,717 | 18,966 | 20,556 | 22,764 | 25,066 | 27,402 |
| Aged | ... | 1,096 | 1,759 | 2,707 | 5,105 | 10,311 | 17,651 | 16,604 | 17,892 | 19,905 | 21,610 | 23,546 |
| Disabled | ... | ... | 158 | 304 | 508 | 1,008 | 2,066 | 2,362 | 2,664 | 2,859 | 3,456 | 3,856 |

SOURCE: Department of the Treasury.

NOTE: ... = not applicable.

- a. For OASI, DI, 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.

CONTACT: Jeff Kunkel (410) 965-3013.

3.C Interprogram Data

Table 3.C4—Average monthly amount of Social Security and selected public assistance programs, December 1950–2003 (in current and 2003 dollars)

| Year | Average monthly Social Security benefit in current-payment status | | | | Average monthly amount per recipient under— | | | | Consumer price index ^a |
|------|--|-----------------|--|-----------------|--|-----------------|---|-----------------|--------------------------------------|
| | Retired workers | | Widowed mother or father and 2 children | | Supplemental Security Income ^b | | Temporary Assistance for Needy Families ^c | | |
| | Current dollars | 2003 dollars | Current dollars | 2003 dollars | Current dollars | 2003 dollars | Current dollars | 2003 dollars | |
| 1950 | 43.86 | 323.34 | 93.90 | 692.24 | 43.05 | 317.37 | 20.85 | 153.71 | 25.0 |
| 1951 | 42.14 | 293.08 | 93.80 | 93.80 | 44.55 | 309.84 | 22.00 | 153.01 | 26.5 |
| 1952 | 49.25 | 339.96 | 106.00 | 106.00 | 48.80 | 336.85 | 23.45 | 161.87 | 26.7 |
| 1953 | 51.10 | 350.11 | 111.90 | 111.90 | 48.90 | 335.03 | 23.20 | 158.96 | 26.9 |
| 1954 | 59.14 | 408.23 | 130.50 | 130.50 | 48.70 | 336.16 | 23.25 | 160.49 | 26.7 |
| 1955 | 61.90 | 425.68 | 135.40 | 135.40 | 50.05 | 344.19 | 23.50 | 161.61 | 26.8 |
| 1956 | 63.09 | 421.29 | 141.00 | 141.00 | 53.25 | 355.58 | 24.80 | 165.61 | 27.6 |
| 1957 | 64.58 | 419.09 | 146.30 | 146.30 | 55.50 | 360.17 | 25.40 | 164.84 | 28.4 |
| 1958 | 66.35 | 423.13 | 151.70 | 151.70 | 56.95 | 363.18 | 26.65 | 169.96 | 28.9 |
| 1959 | 72.78 | 456.24 | 170.70 | 170.70 | 56.70 | 355.44 | 27.30 | 171.14 | 29.4 |
| 1960 | 74.04 | 457.91 | 188.00 | 188.00 | 58.90 | 364.28 | 28.35 | 175.34 | 29.8 |
| 1961 | 75.65 | 464.75 | 189.30 | 189.30 | 57.60 | 353.86 | 29.45 | 180.93 | 30.0 |
| 1962 | 76.19 | 461.91 | 190.70 | 190.70 | 61.55 | 373.15 | 29.30 | 177.64 | 30.4 |
| 1963 | 76.88 | 458.55 | 192.50 | 192.50 | 62.80 | 374.57 | 29.70 | 177.15 | 30.9 |
| 1964 | 77.57 | 458.21 | 193.40 | 193.40 | 63.65 | 375.99 | 31.50 | 186.08 | 31.2 |
| 1965 | 83.92 | 486.37 | 219.80 | 219.80 | 63.10 | 365.71 | 32.85 | 190.39 | 31.8 |
| 1966 | 84.35 | 472.52 | 221.90 | 221.90 | 68.05 | 381.21 | 36.25 | 203.07 | 32.9 |
| 1967 | 85.37 | 464.13 | 224.40 | 224.40 | 70.15 | 381.38 | 39.50 | 214.75 | 33.9 |
| 1968 | 98.86 | 513.24 | 257.10 | 257.10 | 69.55 | 361.08 | 44.75 | 232.33 | 35.5 |
| 1969 | 100.40 | 490.82 | 255.80 | 255.80 | 73.90 | 361.27 | 45.15 | 220.73 | 37.7 |
| 1970 | 118.10 | 546.89 | 291.10 | 291.10 | 77.65 | 359.58 | 50.30 | 232.93 | 39.8 |
| 1971 | 132.17 | 592.68 | 320.00 | 320.00 | 77.50 | 347.53 | 52.30 | 234.53 | 41.1 |
| 1972 | 162.35 | 704.03 | 383.10 | 383.10 | 79.95 | 346.71 | 54.10 | 234.61 | 42.5 |
| 1973 | 166.42 | 663.88 | 391.00 | 391.00 | 76.15 | 303.78 | 56.95 | 227.19 | 46.2 |
| 1974 | 188.21 | 668.35 | 438.40 | 438.40 | 91.06 | 323.36 | 63.37 | 225.04 | 51.9 |
| 1975 | 207.18 | 687.99 | 468.60 | 468.60 | 90.93 | 301.96 | 69.69 | 231.43 | 55.5 |
| 1976 | 224.86 | 712.06 | 503.40 | 503.40 | 94.37 | 298.84 | 75.20 | 238.14 | 58.2 |
| 1977 | 243.00 | 721.18 | 546.60 | 546.60 | 96.62 | 286.75 | 80.08 | 237.67 | 62.1 |
| 1978 | 263.20 | 716.52 | 591.90 | 591.90 | 100.43 | 273.41 | 83.60 | 227.59 | 67.7 |
| 1979 | 294.30 | 707.17 | 655.00 | 655.00 | 122.67 | 294.76 | 90.34 | 217.08 | 76.7 |
| 1980 | 341.40 | 729.09 | 759.20 | 759.20 | 128.20 | 273.79 | 97.10 | 207.37 | 86.3 |
| 1981 | 385.97 | 756.75 | 858.00 | 858.00 | 137.81 | 270.20 | 103.15 | 202.24 | 94.0 |
| 1982 | 419.30 | 791.78 | 885.50 | 885.50 | 145.69 | 275.11 | 106.33 | 200.79 | 97.6 |
| 1983 | 440.77 | 801.92 | 923.00 | 923.00 | 157.89 | 287.26 | 109.93 | 200.01 | 101.3 |
| 1984 | 460.57 | 806.11 | 948.30 | 948.30 | 157.88 | 276.33 | 114.72 | 200.79 | 105.3 |
| 1985 | 478.62 | 807.05 | 981.50 | 981.50 | 164.26 | 276.98 | 118.17 | 199.26 | 109.3 |
| 1986 | 488.44 | 814.66 | 994.00 | 994.00 | 173.66 | 289.65 | 122.09 | 203.64 | 110.5 |
| 1987 | 512.65 | 818.73 | 1032.30 | 1032.30 | 180.64 | 288.50 | 125.19 | 199.94 | 115.4 |
| 1988 | 536.77 | 820.97 | 1070.40 | 1070.40 | 188.23 | 287.90 | 130.30 | 199.29 | 120.5 |
| 1989 | 566.85 | 828.48 | 1120.04 | 1120.04 | 198.81 | 290.57 | 131.89 | 192.77 | 126.1 |
| 1990 | 602.56 | 829.99 | 1177.70 | 1177.70 | 212.66 | 292.93 | 135.96 | 187.28 | 133.8 |
| 1991 | 629.32 | 841.08 | 1216.76 | 1216.76 | 221.30 | 295.77 | 134.98 | 180.40 | 137.9 |
| 1992 | 652.64 | 847.66 | 1252.40 | 1252.40 | 227.39 | 295.34 | 132.92 | 172.64 | 141.9 |
| 1993 | 674.06 | 852.06 | 1282.60 | 1282.60 | 236.52 | 298.98 | 132.87 | 167.96 | 145.8 |
| 1994 | 697.34 | 858.52 | 1328.40 | 1328.40 | 242.54 | 298.60 | 133.71 | 164.62 | 149.7 |
| 1995 | 719.80 | 864.23 | 1365.50 | 1365.50 | 250.65 | 300.95 | 134.35 | 161.31 | 153.5 |
| 1996 | 744.96 | 865.68 | 1450.60 | 1450.60 | 260.75 | 303.01 | 133.53 | 155.17 | 158.6 |
| 1997 | 774.84 | 885.33 | 1502.60 | 1502.60 | 268.46 | 306.75 | 170.71 | 195.06 | 161.3 |
| 1998 | 779.69 | 876.74 | 1537.70 | 1537.70 | 277.45 | 311.99 | 129.04 | 145.11 | 163.9 |
| 1999 | 804.30 | 880.77 | 1590.40 | 1590.40 | 289.19 | 316.69 | ^d 133.41 | 146.10 | 168.3 |

(Continued)

Table 3.C4—Average monthly amount of Social Security and selected public assistance programs, December 1950–2003 (in current and 2003 dollars)

| Year | Average monthly Social Security benefit in current-payment status | | | | Average monthly amount per recipient under— | | | | Consumer price index ^a |
|------|---|--------------|---|--------------|---|--------------|--|--------------|-----------------------------------|
| | Retired workers | | Widowed mother or father and 2 children | | Supplemental Security Income ^b | | Temporary Assistance for Needy Families ^c | | |
| | Current dollars | 2003 dollars | Current dollars | 2003 dollars | Current dollars | 2003 dollars | Current dollars | 2003 dollars | |
| 2000 | 844.48 | 894.47 | 1675.40 | 1675.40 | 299.69 | 317.44 | 151.29 | 160.25 | 174.0 |
| 2001 | 874.44 | 912.06 | 1755.10 | 1755.10 | 314.22 | 327.74 | ^d 155.83 | 162.54 | 176.7 |
| 2002 | 895.00 | 911.83 | 1812.10 | 1812.10 | 330.04 | 336.25 | ^d 160.09 | 163.10 | 180.9 |
| 2003 | 922.08 | 922.08 | 1880.97 | 1880.97 | 342.28 | 342.28 | 161.47 | 161.47 | 184.3 |

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

- a. Data from Bureau of Labor Statistics, consumer price index for all urban consumers (CPI-U) for all items (1982–1984 = 100).
- b. For 1940–1973, data refer to Old-Age Assistance program. Beginning January 1974, the Supplemental Security Income program superseded the Old-Age Assistance program in the 50 states and the District of Columbia.
- 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.
- d. Revised data.

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

3.C Interprogram Data

Table 3.C5—Population aged 65 or older receiving Social Security (OASDI) benefits, Supplemental Security Income (SSI) payments, or both, by state, December 1940–2003, selected years

| Year and state | Population aged 65 or older receiving— | | | | | | Persons receiving both OASDI and SSI as a percentage of— | |
|----------------------|--|------------|------------------|------------|---------------------------------|---------------------------------------|--|----------------|
| | OASDI | | SSI ^a | | OASDI and SSI, number per 1,000 | OASDI, SSI, or both, number per 1,000 | OASDI beneficiaries | SSI recipients |
| | Number per 1,000 | State rank | Number per 1,000 | State rank | | | | |
| 1940 | 7 | ... | 217 | ... | 1 | 223 | 14.3 | 0.5 |
| 1945 | 62 | ... | 194 | ... | 5 | 251 | 8.1 | 2.6 |
| 1950 | 164 | ... | 224 | ... | 22 | 366 | 12.6 | 9.8 |
| 1955 | 394 | ... | 179 | ... | 34 | 539 | 8.6 | 19.2 |
| 1960 | 616 | ... | 141 | ... | 41 | 716 | 6.6 | 28.5 |
| 1965 | 752 | ... | 117 | ... | 52 | 817 | 7.0 | 44.7 |
| 1970 | 855 | ... | 104 | ... | 63 | 896 | 7.4 | 60.4 |
| 1975 | 904 | ... | 111 | ... | 78 | 939 | 8.6 | 69.5 |
| 1980 | 914 | ... | 87 | ... | 61 | 941 | 6.7 | 70.2 |
| 1985 | 917 | ... | 71 | ... | 51 | 937 | 5.5 | 71.1 |
| 1990 | 924 | ... | 66 | ... | 46 | 944 | 4.9 | 69.2 |
| 1995 | 913 | ... | 63 | ... | 39 | 937 | 4.3 | 62.6 |
| 2000 | 911 | ... | 57 | ... | 34 | 934 | 3.7 | 59.1 |
| 2001 | 908 | ... | 56 | ... | 33 | 931 | 3.6 | 58.4 |
| 2002 | 901 | ... | 56 | ... | 32 | 924 | 3.6 | 57.8 |
| 2003 | | | | | | | | |
| United States | 908 | ... | 55 | ... | 32 | 932 | 3.5 | 57.4 |
| Alabama | 932 | 26 | 65 | 10 | 52 | 946 | 5.6 | 79.3 |
| Alaska | 919 | 34 | 74 | 5 | 43 | 950 | 4.7 | 58.4 |
| Arizona | 852 | 49 | 32 | 30 | 19 | 865 | 2.2 | 58.7 |
| Arkansas | 924 | 31 | 55 | 13 | 46 | 933 | 4.9 | 82.6 |
| California | 844 | 50 | 133 | 1 | 64 | 912 | 7.6 | 48.4 |
| Colorado | 914 | 37 | 31 | 31 | 18 | 927 | 1.9 | 57.4 |
| Connecticut | 950 | 12 | 26 | 37 | 13 | 964 | 1.3 | 47.5 |
| Delaware | 957 | 7 | 23 | 41 | 15 | 965 | 1.5 | 64.8 |
| District of Columbia | 789 | 51 | 66 | 9 | 39 | 816 | 5.0 | 59.8 |
| Florida | 852 | 48 | 47 | 19 | 24 | 875 | 2.8 | 51.5 |
| Georgia | 919 | 35 | 65 | 11 | 47 | 937 | 5.1 | 72.2 |
| Hawaii | 884 | 45 | 50 | 17 | 22 | 912 | 2.5 | 44.0 |
| Idaho | 958 | 5 | 19 | 44 | 14 | 963 | 1.5 | 75.1 |
| Illinois | 912 | 39 | 38 | 24 | 16 | 934 | 1.8 | 42.5 |
| Indiana | 950 | 10 | 17 | 49 | 11 | 955 | 1.2 | 68.8 |
| Iowa | 953 | 9 | 17 | 48 | 12 | 958 | 1.2 | 71.6 |
| Kansas | 941 | 18 | 19 | 45 | 12 | 947 | 1.3 | 64.1 |
| Kentucky | 935 | 22 | 69 | 7 | 51 | 953 | 5.4 | 73.6 |
| Louisiana | 902 | 42 | 75 | 4 | 56 | 921 | 6.2 | 74.0 |
| Maine | 950 | 13 | 30 | 32 | 24 | 955 | 2.6 | 81.8 |
| Maryland | 877 | 47 | 40 | 23 | 19 | 898 | 2.2 | 48.0 |
| Massachusetts | 914 | 38 | 56 | 12 | 31 | 939 | 3.4 | 55.8 |
| Michigan | 957 | 6 | 29 | 33 | 17 | 969 | 1.8 | 58.3 |
| Minnesota | 938 | 19 | 26 | 38 | 13 | 951 | 1.4 | 49.7 |
| Mississippi | 925 | 30 | 96 | 2 | 77 | 944 | 8.3 | 80.0 |

(Continued)

Table 3.C5—Population aged 65 or older receiving Social Security (OASDI) benefits, Supplemental Security Income (SSI) payments, or both, by state, December 1940–2003, selected years—Continued

| Year and state | Population aged 65 or older receiving— | | | | | | Persons receiving both OASDI and SSI as a percentage of— | |
|----------------|--|------------|---------------------|------------|------------------------------------|---|--|-------------------|
| | OASDI | | SSI ^a | | OASDI and SSI, number per 1,000 | OASDI, SSI, or both, number per 1,000 | OASDI beneficiaries | SSI recipients |
| | Number per 1,000 | State rank | Number per 1,000 | State rank | | | | |
| 2003 (cont.) | | | | | | | | |
| Missouri | 938 | 20 | 28 | 35 | 20 | 946 | 2.1 | 71.3 |
| Montana | 931 | 27 | 20 | 43 | 15 | 936 | 1.6 | 77.0 |
| Nebraska | 941 | 17 | 17 | 47 | 12 | 947 | 1.3 | 69.5 |
| Nevada | 922 | 33 | 33 | 29 | 19 | 936 | 2.1 | 57.8 |
| New Hampshire | 981 | 1 | 12 | 51 | 8 | 985 | 0.8 | 66.7 |
| New Jersey | 919 | 36 | 45 | 21 | 20 | 943 | 2.2 | 45.3 |
| New Mexico | 892 | 44 | 68 | 8 | 47 | 913 | 5.3 | 68.6 |
| New York | 880 | 46 | 89 | 3 | 41 | 929 | 4.6 | 45.6 |
| North Carolina | 943 | 16 | 51 | 16 | 39 | 954 | 4.2 | 77.7 |
| North Dakota | 944 | 15 | 21 | 42 | 16 | 949 | 1.7 | 75.6 |
| Ohio | 934 | 23 | 24 | 39 | 14 | 944 | 1.5 | 59.4 |
| Oklahoma | 928 | 28 | 36 | 25 | 26 | 938 | 2.9 | 73.4 |
| Oregon | 956 | 8 | 27 | 36 | 16 | 967 | 1.6 | 57.5 |
| Pennsylvania | 936 | 21 | 34 | 27 | 21 | 949 | 2.2 | 61.1 |
| Rhode Island | 933 | 24 | 49 | 18 | 30 | 951 | 3.2 | 61.5 |
| South Carolina | 928 | 29 | 52 | 15 | 41 | 940 | 4.4 | 77.7 |
| South Dakota | 958 | 4 | 29 | 34 | 20 | 968 | 2.1 | 67.7 |
| Tennessee | 946 | 14 | 52 | 14 | 40 | 959 | 4.2 | 75.9 |
| Texas | 900 | 43 | 74 | 6 | 50 | 923 | 5.6 | 68.0 |
| Utah | 910 | 40 | 18 | 46 | 9 | 919 | 1.0 | 50.3 |
| Vermont | 950 | 11 | 34 | 28 | 27 | 956 | 2.9 | 80.8 |
| Virginia | 908 | 41 | 44 | 22 | 27 | 925 | 3.0 | 61.9 |
| Washington | 933 | 25 | 36 | 26 | 14 | 955 | 1.5 | 37.8 |
| West Virginia | 923 | 32 | 45 | 20 | 32 | 937 | 3.4 | 69.8 |
| Wisconsin | 966 | 3 | 23 | 40 | 15 | 974 | 1.5 | 65.7 |
| Wyoming | 970 | 2 | 15 | 50 | 12 | 973 | 1.2 | 79.2 |

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

NOTE: . . . = not applicable.

a. For 1940–1973, data refer to the Old-Age Assistance program. Beginning January 1974, the Supplemental Security Income program superseded the Old-Age Assistance program in the 50 states and the District of Columbia.

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

3.C Interprogram Data

Table 3.C6—Number and percentage of Social Security (OASDI) beneficiaries also receiving federally administered Supplemental Security Income (SSI) payments, by type of OASDI benefit and SSI eligibility category, December 2003

| Type of benefit | All OASDI beneficiaries ^a | Number receiving SSI | | | Percentage of all OASDI beneficiaries | | |
|---|--------------------------------------|----------------------|--------------|--------------------|---------------------------------------|--------------|--------------------|
| | | Total | Aged | Blind and disabled | Total | Aged | Blind and disabled |
| Total | 47,053,140 | 2,427,370 | 700,520 | 1,726,850 | 5.2 | 1.5 | 3.7 |
| Retirement | 32,650,150 | 1,038,190 | 564,230 | 473,960 | 3.2 | 1.7 | 1.5 |
| Workers aged 65 or older | 26,960,220 | 780,420 | 504,430 | 275,990 | 2.9 | 1.9 | 1.0 |
| Men | 13,922,820 | 306,570 | 191,360 | 115,210 | 2.2 | 1.4 | 0.8 |
| Women | 13,037,400 | 473,850 | 313,070 | 160,780 | 3.6 | 2.4 | 1.2 |
| Workers aged 62–64 | 2,587,310 | 30,530 | 0 | 30,530 | 1.2 | 0 | 1.2 |
| Men | 1,331,110 | 19,550 | 0 | 19,550 | 1.5 | 0 | 1.5 |
| Women | 1,256,200 | 10,980 | 0 | 10,980 | 0.9 | 0 | 0.9 |
| Wives and husbands | 2,622,130 | 127,020 | 59,780 | 67,240 | 4.8 | 2.3 | 2.6 |
| Aged 65 or older | 2,307,550 | 115,140 | 59,780 | 55,360 | 5.0 | 2.6 | 2.4 |
| Aged 62–64 | 269,730 | 10,760 | 0 | 10,760 | 4.0 | 0 | 4.0 |
| Under age 62 with children | 44,850 | 1,120 | 0 | 1,120 | 2.5 | 0 | 2.5 |
| Disabled adult children | 192,750 | 96,360 | ^b | ^b | 50.0 | ^b | ^b |
| Aged 65 or older | 1,040 | 380 | ^b | ^b | 36.5 | ^b | ^b |
| Aged 18–64 | 191,710 | 95,980 | 0 | 95,980 | 50.1 | 0 | 50.1 |
| Children under age 18 and students aged 18–19 | 287,740 | 3,860 | 0 | 3,860 | 1.3 | 0 | 1.3 |
| Survivors | 6,804,720 | 457,780 | 135,340 | 322,440 | 6.7 | 2.0 | 4.7 |
| Nondisabled widow(er)s | 4,499,900 | 235,300 | 132,360 | 102,940 | 5.2 | 2.9 | 2.3 |
| Aged 65 or older | 4,047,720 | 228,260 | 132,360 | 95,900 | 5.6 | 3.3 | 2.4 |
| Aged 60–64 | 452,180 | 7,040 | 0 | 7,040 | 1.6 | 0 | 1.6 |
| Disabled widow(er)s | 207,630 | 36,860 | 0 | 36,860 | 17.8 | 0 | 17.8 |
| Widowed mothers and fathers | 188,320 | 4,910 | ^b | ^b | 2.6 | ^b | ^b |
| Parents | 2,190 | 120 | ^b | ^b | 5.5 | ^b | ^b |
| Disabled adult children | 500,970 | 158,950 | 2,860 | 156,090 | 31.7 | 0.6 | 31.2 |
| Aged 65 or older | 66,000 | 22,050 | 2,860 | 19,190 | 33.4 | 4.3 | 29.1 |
| Aged 18–64 | 434,970 | 136,900 | 0 | 136,900 | 31.5 | 0 | 31.5 |
| Children under age 18 and students aged 18–19 | 1,405,710 | 21,640 | 0 | 21,640 | 1.5 | 0 | 1.5 |
| Disability | 7,598,270 | 931,400 | 950 | 930,450 | 12.3 | 0 | 12.2 |
| Workers under age 65 | 5,867,460 | 832,520 | 0 | 832,520 | 14.2 | 0 | 14.2 |
| Men | 3,225,850 | 367,510 | 0 | 367,510 | 11.4 | 0 | 11.4 |
| Women | 2,641,610 | 465,010 | 0 | 465,010 | 17.6 | 0 | 17.6 |
| Wives and husbands | 151,500 | 10,310 | 950 | 9,360 | 6.8 | 0.6 | 6.2 |
| Aged 65 or older | 23,590 | 3,160 | 950 | 2,210 | 13.4 | 4.0 | 9.4 |
| Aged 62–64 | 31,370 | 1,660 | 0 | 1,660 | 5.3 | 0 | 5.3 |
| Under age 62 with children | 96,540 | 5,490 | 0 | 5,490 | 5.7 | 0 | 5.7 |
| Disabled adult children aged 18–64 | 63,480 | 44,280 | 0 | 44,280 | 69.8 | 0 | 69.8 |
| Children under age 18 and students aged 18–19 | 1,515,830 | 44,290 | 0 | 44,290 | 2.9 | 0 | 2.9 |

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

a. Includes special age-72 beneficiaries.

b. Data not shown to avoid disclosure of information for particular individuals.

CONTACT: Paul Davies (410) 966-0299.

Table 3.C6.1—Number of persons aged 18–64 receiving Social Security (OASDI) benefits or federally administered Supplemental Security Income (SSI) payments based on disability, by type of benefit, December 1978–2003

| Year | Unduplicated total ^a | OASDI beneficiaries | | | | Blind or disabled SSI recipients | | |
|------|---------------------------------|---------------------|------------------|--------------------------------------|---------------------|----------------------------------|------------------------|------------------------------|
| | | Total | Disabled workers | Disabled adult children under age 65 | Disabled widow(er)s | Total | Receiving SSI only | Receiving both SSI and OASDI |
| 1978 | 4,676,450 | 3,415,469 | 2,879,774 | 405,944 | 129,751 | 1,747,126 | ^b 1,260,981 | 486,145 |
| 1979 | 4,662,528 | 3,419,624 | 2,870,590 | 419,201 | 129,833 | 1,726,553 | ^b 1,242,904 | 483,649 |
| 1980 | 4,662,546 | 3,418,434 | 2,858,680 | 432,174 | 127,580 | 1,730,847 | ^b 1,244,112 | 486,735 |
| 1981 | 4,570,071 | 3,340,701 | 2,776,519 | 442,592 | 121,590 | 1,702,895 | ^b 1,229,370 | 473,525 |
| 1982 | 4,366,314 | 3,169,449 | 2,603,599 | 449,478 | 116,372 | 1,655,279 | ^b 1,196,865 | 458,414 |
| 1983 | 4,367,241 | 3,143,111 | 2,569,029 | 462,491 | 111,591 | 1,699,774 | ^b 1,224,130 | 475,644 |
| 1984 | 4,460,188 | 3,183,618 | 2,596,516 | 477,951 | 109,151 | 1,780,459 | ^b 1,276,570 | 503,889 |
| 1985 | 4,591,316 | 3,258,200 | 2,656,638 | 494,557 | 107,005 | 1,879,168 | ^b 1,333,116 | 546,052 |
| 1986 | 4,812,143 | 3,346,603 | 2,728,463 | 511,166 | 106,974 | 2,010,458 | ^b 1,465,540 | 544,918 |
| 1987 | 4,904,785 | 3,416,529 | 2,785,859 | 524,388 | 106,282 | 2,118,710 | ^b 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 | ^c 1,615,307 | 686,619 |
| 1990 | 5,395,261 | 3,667,721 | 3,011,294 | 555,438 | 100,989 | 2,449,897 | 1,727,540 | 722,357 |
| 1991 | 5,743,614 | 3,877,804 | 3,194,938 | 568,377 | 114,489 | 2,641,524 | 1,865,810 | 775,714 |
| 1992 | 6,249,217 | 4,185,714 | 3,467,783 | 586,607 | 131,324 | 2,909,997 | 2,063,503 | 846,494 |
| 1993 | 6,707,127 | 4,476,648 | 3,725,966 | 603,667 | 147,015 | 3,148,413 | 2,230,479 | 917,934 |
| 1994 | 7,103,399 | 4,741,348 | 3,962,954 | 617,718 | 160,676 | 3,335,255 | 2,362,051 | 973,204 |
| 1995 | 7,398,942 | 4,987,004 | 4,185,263 | 628,717 | 173,024 | 3,482,256 | 2,411,938 | 1,070,318 |
| 1996 | 7,691,134 | 5,205,071 | 4,385,623 | 637,537 | 181,911 | 3,568,393 | 2,486,063 | 1,082,330 |
| 1997 | 7,818,216 | 5,340,082 | 4,508,134 | 644,010 | 187,938 | 3,561,625 | 2,478,134 | 1,083,491 |
| 1998 | 8,090,686 | 5,543,886 | 4,698,319 | 651,386 | 194,181 | 3,646,020 | 2,546,800 | 1,099,220 |
| 1999 | 8,311,949 | 5,736,071 | 4,879,455 | 657,821 | 198,795 | 3,690,970 | 2,575,878 | 1,115,092 |
| 2000 | 8,519,241 | 5,908,756 | 5,042,334 | 664,995 | 201,427 | 3,744,022 | 2,610,485 | 1,133,537 |
| 2001 | 8,799,998 | 6,150,475 | 5,274,183 | 672,049 | 204,243 | 3,811,494 | 2,649,523 | 1,161,971 |
| 2002 | 9,118,926 | 6,430,412 | 5,543,981 | 679,073 | 207,358 | 3,877,752 | 2,688,514 | 1,189,238 |
| 2003 | 9,510,138 | 6,769,336 | 5,873,673 | 686,304 | 209,359 | 3,953,248 | 2,740,802 | 1,212,446 |

SOURCE: Social Security Administration, Master Beneficiary Record and Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

- Includes persons receiving Old-Age, Survivors, and Disability Insurance (OASDI), SSI, or both.
- The number of OASDI disabled adult child beneficiaries aged 18–64 also receiving SSI was estimated on the basis of the number of such beneficiaries aged 18 or older for the same year and on the comparative size of the two groups at the end of 1988.
- December data for OASDI disabled beneficiaries also receiving SSI were not available. Instead, the average of the September 1989 and March 1990 numbers was used.

CONTACT: Art Kahn (410) 965-0186.

3.C Interprogram Data

Table 3.C7a—Number of persons aged 15 or older, reporting only one race, with Social Security benefits or Supplemental Security Income in March 2003, by sex, age, and race, and average annual benefit in 2002

| Sex and age | All persons | | White | Black or African American | American Indian, Alaska Native | Asian | Native Hawaiian and Other Pacific Islander |
|--|--------------------|-------------------------|--------|---------------------------|--------------------------------|-------|--|
| | Total ^a | Reporting only one race | | | | | |
| Social Security beneficiaries (thousands) | | | | | | | |
| Total | 40,626 | 40,230 | 35,064 | 4,047 | 202 | 868 | 50 |
| Sex | | | | | | | |
| Male | 17,643 | 17,471 | 15,316 | 1,654 | 91 | 385 | b |
| Female | 22,983 | 22,760 | 19,747 | 2,393 | 111 | 483 | b |
| Age | | | | | | | |
| 15–54 | 4,759 | 4,655 | 3,569 | 964 | 59 | 59 | b |
| 55–64 | 4,985 | 4,912 | 4,127 | 651 | 33 | 95 | b |
| 65–74 | 15,840 | 15,705 | 13,840 | 1,321 | 75 | 436 | b |
| 75 or older | 15,042 | 14,958 | 13,528 | 1,111 | 35 | 277 | b |
| Supplemental Security Income recipients (thousands) | | | | | | | |
| Total | 5,173 | 5,072 | 3,438 | 1,338 | 58 | 231 | 7 |
| Sex | | | | | | | |
| Male | 2,209 | 2,178 | 1,503 | 552 | 25 | 95 | b |
| Female | 2,964 | 2,894 | 1,935 | 786 | 33 | 135 | b |
| Age | | | | | | | |
| 15–54 | 3,067 | 2,998 | 2,061 | 852 | 35 | 46 | b |
| 55–64 | 881 | 870 | 619 | 219 | 8 | 22 | b |
| 65–74 | 597 | 585 | 362 | 134 | 9 | 78 | b |
| 75 or older | 628 | 619 | 396 | 132 | 6 | 85 | b |
| Average annual benefit in 2002 (dollars) | | | | | | | |
| Social Security | 9,977 | 9,985 | 10,185 | 8,524 | 8,426 | 8,984 | b |
| Supplemental Security Income | 5,417 | 5,416 | 5,444 | 5,229 | 3,919 | 6,452 | b |

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2003 Income Supplement.

NOTES: Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, Series P-60.

a. The sum of the individual categories may not equal the total because of independent rounding.

b. Fewer than 75,000 weighted cases.

CONTACT: Curt Pauzenga (410) 965-7210.

Table 3.C7b—Number of persons aged 15 or older, reporting one or more races, with Social Security benefits or Supplemental Security Income in March 2003, by sex, age, and race, and average annual benefit in 2002

| Sex and age | All persons | | | White alone or in combination | Black or African American alone or in combination | American Indian, Alaska Native alone or in combination | Asian alone or in combination | Native Hawaiian and Other Pacific Islander alone or in combination |
|--|--------------------|-------------------------|-----------------------------|-------------------------------|---|--|-------------------------------|--|
| | Total ^a | Reporting only one race | Reporting two or more races | | | | | |
| Social Security beneficiaries (thousands) | | | | | | | | |
| Total ^b | 40,626 | 40,230 | 396 | 35,401 | 4,137 | 527 | 893 | 71 |
| Sex | | | | | | | | |
| Male | 17,643 | 17,471 | 173 | 15,467 | 1,688 | 227 | 402 | ^c |
| Female | 22,983 | 22,760 | 223 | 19,934 | 2,449 | 301 | 491 | ^c |
| Age | | | | | | | | |
| 15–54 | 4,759 | 4,655 | 103 | 3,661 | 997 | 129 | 68 | ^c |
| 55–64 | 4,985 | 4,912 | 73 | 4,190 | 660 | 98 | 101 | ^c |
| 65–74 | 15,840 | 15,705 | 135 | 13,956 | 1,343 | 195 | 444 | ^c |
| 75 or older | 15,042 | 14,958 | 84 | 13,594 | 1,138 | 106 | 280 | ^c |
| Supplemental Security Income recipients (thousands) | | | | | | | | |
| Total ^b | 5,173 | 5,072 | 101 | 3,523 | 1,376 | 125 | 240 | 11 |
| Sex | | | | | | | | |
| Male | 2,209 | 2,178 | 31 | 1,532 | 563 | 43 | 101 | ^c |
| Female | 2,964 | 2,894 | 70 | 1,991 | 814 | 81 | 140 | ^c |
| Age | | | | | | | | |
| 15–54 | 3,067 | 2,998 | 69 | 2,123 | 878 | 75 | 55 | ^c |
| 55–64 | 881 | 870 | 11 | 629 | 222 | 15 | 23 | ^c |
| 65–74 | 597 | 585 | 12 | 371 | 137 | 21 | 78 | ^c |
| 75 or older | 628 | 619 | 9 | 400 | 139 | 13 | 85 | ^c |
| Average annual benefit in 2002 (dollars) | | | | | | | | |
| Social Security | 9,977 | 9,985 | 9,163 | 10,175 | 8,532 | 8,954 | 9,013 | ^c |
| Supplemental Security Income | 5,417 | 5,416 | 5,453 | 5,442 | 5,248 | 4,414 | 6,481 | ^c |

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2003 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.

"In combination" means in combination with one or more other races.

- a. The sum of the individual categories may not equal the total because of independent rounding.
- b. The sum of the five race groups adds to more than the total because individuals may report more than one race.
- c. Fewer than 75,000 weighted cases.

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 (SSI) and number and percentage of Hispanic origin in March 2003, by age and sex, and average annual benefit in 2002

| Age | All beneficiaries (thousands) | | | Hispanic origin ^a (thousands) | | | Hispanic origin as a percentage of all beneficiaries ^a | | |
|--|-------------------------------|--------|--------|--|-------|-------|---|------|-------|
| | Total | Men | Women | Total | Men | Women | Total | Men | Women |
| Social Security beneficiaries | | | | | | | | | |
| Total, all ages | 40,626 | 17,643 | 22,983 | 2,380 | 1,031 | 1,349 | 5.9 | 5.8 | 5.9 |
| 15-34 | 1,627 | 813 | 814 | 197 | 87 | 110 | 12.1 | 10.7 | 13.5 |
| 35-44 | 1,254 | 585 | 669 | 90 | 31 | 59 | 7.2 | 5.3 | 8.8 |
| 45-54 | 1,878 | 904 | 974 | 181 | 98 | 83 | 9.6 | 10.8 | 8.5 |
| 55-64 | 4,985 | 2,209 | 2,777 | 322 | 139 | 183 | 6.5 | 6.3 | 6.6 |
| 65-74 | 15,840 | 7,240 | 8,600 | 951 | 408 | 543 | 6.0 | 5.6 | 6.3 |
| 75 or older | 15,042 | 5,892 | 9,150 | 639 | 268 | 371 | 4.2 | 4.6 | 4.0 |
| Supplemental Security Income recipients | | | | | | | | | |
| Total, all ages | 5,173 | 2,209 | 2,964 | 738 | 295 | 443 | 14.3 | 13.4 | 15.0 |
| 15-34 | 1,130 | 556 | 575 | 133 | 56 | 77 | 11.8 | 10.1 | 13.4 |
| 35-44 | 848 | 387 | 461 | 105 | 51 | 55 | 12.4 | 13.1 | 11.9 |
| 45-54 | 1,088 | 519 | 569 | 144 | 65 | 79 | 13.2 | 12.5 | 13.9 |
| 55-64 | 881 | 376 | 505 | 124 | 46 | 78 | 14.0 | 12.2 | 15.4 |
| 65-74 | 597 | 208 | 389 | 121 | 44 | 76 | 20.2 | 21.4 | 19.6 |
| 75 or older | 628 | 164 | 465 | 112 | 33 | 79 | 17.8 | 20.3 | 16.9 |
| Average annual benefit in 2002 ^b (dollars) | | | | | | | | | |
| Social Security | 9,977 | 11,464 | 8,836 | 8,095 | 9,187 | 7,260 | ... | ... | ... |
| Supplemental Security Income | 5,417 | 5,765 | 5,158 | 5,118 | 5,614 | 4,788 | ... | ... | ... |

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2003 Income Supplement.

NOTES: Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, Series P-60.

... = not applicable.

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

b. For 2002, average benefits are shown. Tables in previous years showed median benefits.

CONTACT: Curt Pauzenga (410) 965-7210.

Table 3.E1—Weighted average poverty thresholds for nonfarm families, by size, 1959–2003 (in dollars)

| Year | Unrelated individuals | | | Families | | | | | | | | Annual average CPI ^a |
|------|-----------------------|--------------|------------------|-----------|--------------------------|------------------------------|-----------|-----------|-----------|-----------|-------------------|---------------------------------|
| | | | | 2 persons | | | 3 persons | 4 persons | 5 persons | 6 persons | 7 persons or more | |
| | All ages | Under age 65 | Aged 65 or older | All ages | Householder under age 65 | Householder aged 65 or older | | | | | | |
| 1959 | 1,467 | 1,503 | 1,397 | 1,894 | 1,952 | 1,761 | 2,324 | 2,973 | 3,506 | 3,944 | 4,849 | 29.2 |
| 1960 | 1,490 | 1,526 | 1,418 | 1,924 | 1,982 | 1,788 | 2,359 | 3,022 | 3,560 | 4,002 | 4,921 | 29.6 |
| 1961 | 1,506 | 1,545 | 1,433 | 1,942 | 2,005 | 1,808 | 2,383 | 3,054 | 3,597 | 4,041 | 4,967 | 29.9 |
| 1962 | 1,519 | 1,562 | 1,451 | 1,962 | 2,027 | 1,828 | 2,412 | 3,089 | 3,639 | 4,088 | 5,032 | 30.3 |
| 1963 | 1,539 | 1,581 | 1,470 | 1,988 | 2,052 | 1,850 | 2,442 | 3,128 | 3,685 | 4,135 | 5,092 | 30.6 |
| 1964 | 1,558 | 1,601 | 1,488 | 2,015 | 2,079 | 1,875 | 2,473 | 3,169 | 3,732 | 4,193 | 5,156 | 31.0 |
| 1965 | 1,582 | 1,626 | 1,512 | 2,048 | 2,114 | 1,906 | 2,514 | 3,223 | 3,797 | 4,264 | 5,248 | 31.5 |
| 1966 | 1,628 | 1,674 | 1,556 | 2,107 | 2,175 | 1,961 | 2,588 | 3,317 | 3,908 | 4,388 | 5,395 | 32.5 |
| 1967 | 1,675 | 1,722 | 1,600 | 2,168 | 2,238 | 2,017 | 2,661 | 3,410 | 4,019 | 4,516 | 5,550 | 33.4 |
| 1968 | 1,748 | 1,797 | 1,667 | 2,262 | 2,333 | 2,102 | 2,774 | 3,553 | 4,188 | 4,706 | 5,789 | 34.8 |
| 1969 | 1,840 | 1,893 | 1,757 | 2,383 | 2,458 | 2,215 | 2,924 | 3,743 | 4,415 | 4,958 | 6,101 | 36.7 |
| 1970 | 1,954 | 2,010 | 1,861 | 2,525 | 2,604 | 2,348 | 3,099 | 3,968 | 4,680 | 5,260 | 6,468 | 38.8 |
| 1971 | 2,040 | 2,098 | 1,940 | 2,633 | 2,716 | 2,448 | 3,229 | 4,137 | 4,880 | 5,489 | 6,751 | 40.5 |
| 1972 | 2,109 | 2,168 | 2,005 | 2,724 | 2,808 | 2,530 | 3,339 | 4,275 | 5,044 | 5,673 | 6,983 | 41.8 |
| 1973 | 2,247 | 2,307 | 2,130 | 2,895 | 2,984 | 2,688 | 3,548 | 4,540 | 5,358 | 6,028 | 7,435 | 44.4 |
| 1974 | 2,495 | 2,562 | 2,364 | 3,211 | 3,312 | 2,982 | 3,936 | 5,038 | 5,950 | 6,699 | 8,253 | 49.3 |
| 1975 | 2,724 | 2,797 | 2,581 | 3,506 | 3,617 | 3,257 | 4,293 | 5,500 | 6,499 | 7,316 | 9,022 | 53.8 |
| 1976 | 2,884 | 2,959 | 2,730 | 3,711 | 3,826 | 3,445 | 4,540 | 5,815 | 6,876 | 7,760 | 9,588 | 56.9 |
| 1977 | 3,075 | 3,152 | 2,906 | 3,951 | 4,072 | 3,666 | 4,833 | 6,191 | 7,320 | 8,261 | 10,216 | 60.6 |
| 1978 | 3,311 | 3,392 | 3,127 | 4,249 | 4,383 | 3,944 | 5,201 | 6,662 | 7,880 | 8,891 | 11,002 | 65.2 |
| 1979 | 3,689 | 3,778 | 3,479 | 4,725 | 4,878 | 4,390 | 5,784 | 7,412 | 8,775 | 9,914 | 12,280 | 72.6 |
| 1980 | 4,190 | 4,290 | 3,949 | 5,363 | 5,537 | 4,983 | 6,565 | 8,414 | 9,966 | 11,269 | 13,955 | 82.4 |
| 1981 | 4,620 | 4,729 | 4,359 | 5,917 | 6,111 | 5,498 | 7,250 | 9,287 | 11,007 | 12,449 | ... | 90.9 |
| 1982 | 4,901 | 5,019 | 4,626 | 6,281 | 6,487 | 5,836 | 7,693 | 9,862 | 11,684 | 13,207 | ... | 96.5 |
| 1983 | 5,061 | 5,180 | 4,775 | 6,483 | 6,697 | 6,023 | 7,938 | 10,178 | 12,049 | 13,630 | ... | 99.6 |
| 1984 | 5,278 | 5,400 | 4,979 | 6,762 | 6,983 | 6,282 | 8,277 | 10,609 | 12,566 | 14,207 | ... | 103.9 |
| 1985 | 5,469 | 5,593 | 5,156 | 6,998 | 7,231 | 6,503 | 8,573 | 10,989 | 13,007 | 14,696 | ... | 107.6 |
| 1986 | 5,572 | 5,701 | 5,255 | 7,138 | 7,372 | 6,630 | 8,737 | 11,203 | 13,259 | 14,986 | ... | 109.6 |
| 1987 | 5,778 | 5,909 | 5,447 | 7,397 | 7,641 | 6,872 | 9,056 | 11,611 | 13,737 | 15,509 | ... | 113.6 |
| 1988 | 6,022 | 6,155 | 5,674 | 7,704 | 7,958 | 7,157 | 9,435 | 12,092 | 14,304 | 16,146 | ... | 118.3 |
| 1989 | 6,310 | 6,451 | 5,947 | 8,076 | 8,343 | 7,501 | 9,885 | 12,674 | 14,990 | 16,921 | ... | 124.0 |
| 1990 | 6,652 | 6,800 | 6,268 | 8,509 | 8,794 | 7,905 | 10,419 | 13,359 | 15,792 | 17,839 | ... | 130.7 |
| 1991 | 6,932 | 7,086 | 6,532 | 8,865 | 9,165 | 8,241 | 10,860 | 13,924 | 16,456 | 18,587 | ... | 136.2 |
| 1992 | 7,143 | 7,299 | 6,729 | 9,137 | 9,443 | 8,487 | 11,186 | 14,335 | 16,952 | 19,137 | ... | 140.3 |
| 1993 | 7,363 | 7,518 | 6,930 | 9,414 | 9,728 | 8,740 | 11,522 | 14,763 | 17,449 | 19,718 | ... | 144.5 |
| 1994 | 7,547 | 7,710 | 7,108 | 9,661 | 9,976 | 8,967 | 11,821 | 15,141 | 17,900 | 20,235 | ... | 148.2 |

(Continued)

3.E Poverty

Table 3.E1—Weighted average poverty thresholds for nonfarm families, by size, 1959–2003 (in dollars)—Continued

| Year | Unrelated individuals | | | Families | | | | | | | | Annual average CPI ^a |
|------|-----------------------|--------------|------------------|-----------|--------------------------|------------------------------|-----------|-----------|-----------|-----------|-------------------|---------------------------------|
| | | | | 2 persons | | | 3 persons | 4 persons | 5 persons | 6 persons | 7 persons or more | |
| | All ages | Under age 65 | Aged 65 or older | All ages | Householder under age 65 | Householder aged 65 or older | | | | | | |
| 1995 | 7,763 | 7,929 | 7,309 | 9,933 | 10,259 | 9,219 | 12,158 | 15,569 | 18,408 | 20,804 | ... | 152.4 |
| 1996 | 7,995 | 8,163 | 7,525 | 10,233 | 10,564 | 9,491 | 12,516 | 16,036 | 18,952 | 21,389 | ... | 156.9 |
| 1997 | 8,183 | 8,350 | 7,698 | 10,473 | 10,805 | 9,712 | 12,802 | 16,400 | 19,380 | 21,886 | ... | 160.5 |
| 1998 | 8,316 | 8,480 | 7,818 | 10,634 | 10,972 | 9,862 | 13,003 | 16,660 | 19,680 | 22,228 | ... | 163.0 |
| 1999 | 8,501 | 8,667 | 7,990 | 10,869 | 11,214 | 10,075 | 13,290 | 17,029 | 20,127 | 22,727 | ... | 166.6 |
| 2000 | 8,794 | 8,959 | 8,259 | 11,239 | 11,590 | 10,419 | 13,738 | 17,603 | 20,819 | 23,528 | ... | 172.2 |
| 2001 | 9,039 | 9,214 | 8,494 | 11,569 | 11,920 | 10,715 | 14,128 | 18,104 | 21,405 | 24,195 | ... | 177.1 |
| 2002 | 9,183 | 9,359 | 8,628 | 11,756 | 12,110 | 10,885 | 14,348 | 18,392 | 21,744 | 24,576 | ... | 179.9 |
| 2003 | 9,393 | 9,573 | 8,825 | 12,015 | 12,384 | 11,133 | 14,680 | 18,810 | 22,245 | 25,122 | ... | 184.0 |

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 | | | Year | 9 persons | | |
|------|-----------|-----------|---------|------|-----------|-----------|---------|
| | 7 persons | 8 persons | or more | | 7 persons | 8 persons | or more |
| 1980 | 12,761 | 14,199 | 16,896 | 1992 | 21,594 | 24,053 | 28,745 |
| 1981 | 14,110 | 15,655 | 18,572 | 1993 | 22,383 | 24,838 | 29,529 |
| 1982 | 15,036 | 16,719 | 19,698 | 1994 | 22,923 | 25,427 | 30,300 |
| 1983 | 15,500 | 17,170 | 20,310 | 1995 | 23,552 | 26,237 | 31,280 |
| 1984 | 16,096 | 17,961 | 21,247 | 1996 | 24,268 | 27,091 | 31,971 |
| 1985 | 16,656 | 18,512 | 22,083 | 1997 | 24,802 | 27,593 | 32,566 |
| 1986 | 17,049 | 18,791 | 22,497 | 1998 | 25,257 | 28,166 | 33,339 |
| 1987 | 17,649 | 19,515 | 23,105 | 1999 | 25,912 | 28,967 | 34,417 |
| 1988 | 18,232 | 20,253 | 24,129 | 2000 | 26,754 | 29,701 | 35,060 |
| 1989 | 19,162 | 21,328 | 25,480 | 2001 | 27,517 | 30,627 | 36,286 |
| 1990 | 20,241 | 22,582 | 26,848 | 2002 | 28,001 | 30,907 | 37,062 |
| 1991 | 21,058 | 23,605 | 27,942 | 2003 | 28,544 | 31,589 | 37,656 |

a. Beginning in January 1978, the Bureau of Labor Statistics introduced a new price index for all urban consumers (CPI-U) for all items (1982–1984 = 100) that forms a continuous series with the earlier index for urban wage earners and for clerical workers as of December 1977.

CONTACT: Joe Dalaker (301) 763-3213.

Table 3.E2—Number and percentage of poor persons, by age, at end of selected years 1959–2002

| Age and family status ^a | 1959 | 1970 | 1975 | 1980 | 1985 | 1990 ^b | 2000 | 2001 | 2002 |
|---|-------|-------|-------|-------|-------|-------------------|-------|-------|-------|
| Total population^c(millions) | | | | | | | | | |
| All ages | 176.5 | 202.5 | 210.4 | 225.0 | 236.6 | 248.6 | 275.9 | 281.5 | 285.3 |
| Children under 18 in families— | 64.0 | 69.9 | 64.8 | 62.2 | 62.0 | 64.9 | 70.6 | 70.8 | 71.5 |
| With male householder ^d | 58.3 | 60.8 | 54.1 | 50.6 | 49.5 | 49.5 | 54.5 | 54.0 | 54.3 |
| With female householder | 5.7 | 9.0 | 10.6 | 11.5 | 12.5 | 15.4 | 16.1 | 16.8 | 17.2 |
| 18–54 ^e | 81.0 | 94.9 | 104.7 | 116.3 | 125.2 | 132.3 | 147.4 | 150.1 | 151.2 |
| 55–64 | 15.5 | 18.4 | 19.8 | 21.7 | 22.1 | 21.3 | 23.8 | 25.9 | 27.4 |
| 65 or older | 15.6 | 19.3 | 21.7 | 24.7 | 27.3 | 30.1 | 33.0 | 33.8 | 34.2 |
| In families | 11.9 | 13.4 | 14.8 | 16.7 | 18.4 | 20.1 | 22.3 | 22.5 | 22.9 |
| Unrelated individuals | 3.7 | 5.8 | 6.9 | 8.0 | 8.9 | 10.0 | 10.7 | 11.2 | 11.3 |
| Men | 1.2 | 1.4 | 1.5 | 1.7 | 2.0 | 2.3 | 2.9 | 3.0 | 3.2 |
| Women | 2.5 | 4.4 | 5.4 | 6.3 | 7.0 | 7.7 | 7.8 | 8.3 | 8.2 |
| Number poor^c(millions) | | | | | | | | | |
| All ages | 39.5 | 25.3 | 25.9 | 29.3 | 33.1 | 33.6 | 31.1 | 32.9 | 34.6 |
| Children under 18 in families— | 17.2 | 10.5 | 10.9 | 11.1 | 12.5 | 13.3 | 11.1 | 11.1 | 11.6 |
| With male householder ^d | 13.1 | 5.7 | 5.3 | 5.2 | 5.8 | 5.3 | 4.9 | 4.7 | 5.0 |
| With female householder | 4.1 | 4.8 | 5.6 | 5.9 | 6.7 | 8.0 | 6.2 | 6.4 | 6.6 |
| 18–54 ^e | 13.4 | 8.2 | 9.7 | 12.2 | 14.8 | 14.6 | 14.1 | 15.6 | 16.5 |
| 55–64 | 3.3 | 2.1 | 2.0 | 2.1 | 2.3 | 2.1 | 2.2 | 2.4 | 2.6 |
| 65 or older | 5.5 | 4.7 | 3.3 | 3.9 | 3.5 | 3.7 | 3.4 | 3.4 | 3.6 |
| In families | 3.2 | 2.0 | 1.2 | 1.4 | 1.2 | 1.2 | 1.1 | 1.2 | 1.4 |
| Unrelated individuals | 2.3 | 2.7 | 2.1 | 2.4 | 2.3 | 2.5 | 2.2 | 2.2 | 2.2 |
| Men | 0.7 | 0.5 | 0.4 | 0.4 | 0.4 | 0.4 | 0.5 | 0.5 | 0.5 |
| Women | 1.6 | 2.2 | 1.7 | 2.0 | 1.9 | 2.1 | 1.7 | 1.8 | 1.7 |
| Percentage poor^c | | | | | | | | | |
| All ages | 22.4 | 12.6 | 12.3 | 13.0 | 14.0 | 13.5 | 11.3 | 11.7 | 12.1 |
| Children under 18 in families— | 26.9 | 15.0 | 16.8 | 17.9 | 20.1 | 20.5 | 15.7 | 15.7 | 16.2 |
| With male householder ^d | 22.4 | 9.3 | 9.8 | 10.4 | 11.7 | 10.7 | 8.9 | 8.7 | 9.2 |
| With female householder | 72.2 | 53.4 | 52.7 | 50.8 | 53.6 | 52.1 | 38.4 | 38.2 | 38.6 |
| 18–54 ^e | 16.5 | 8.7 | 9.2 | 10.5 | 11.8 | 11.0 | 9.6 | 10.4 | 10.9 |
| 55–64 | 21.5 | 11.4 | 10.2 | 9.5 | 10.5 | 9.7 | 9.4 | 9.4 | 9.4 |
| 65 or older | 35.2 | 24.6 | 15.3 | 15.7 | 12.6 | 12.2 | 10.2 | 10.1 | 10.4 |
| In families | 26.9 | 14.7 | 8.0 | 8.5 | 6.4 | 5.9 | 5.1 | 5.3 | 6.0 |
| Unrelated individuals | 61.9 | 47.1 | 31.0 | 30.6 | 25.6 | 24.8 | 20.8 | 19.7 | 19.5 |
| Men | 59.0 | 38.9 | 27.7 | 24.4 | 20.5 | 17.3 | 18.3 | 15.8 | 16.1 |
| Women | 63.3 | 49.7 | 31.9 | 32.3 | 27.0 | 26.9 | 21.8 | 21.2 | 20.8 |

SOURCES: U.S. Census Bureau, Current Population Survey, public-use file of the March 2003 Income Supplement. Data for 1970 and 1975 are based on the 1970 Census of Population controls.

NOTES: Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, Series P-60.

- a. Income and poverty status refer to the calendar year shown; family status is as of March of the succeeding year.
- b. Based on revised methodology.
- c. Includes armed forces in the United States living off post or with families on post. Excludes unrelated individuals under age 16.
- d. Includes children in families with both spouses present and in families with male householder with no spouse present.
- e. Includes persons under age 18 listed as unrelated individual, family householder, spouse of householder, or other family member.

CONTACT: Curt Pauzenga (410) 965-7210.

3.E Poverty

Table 3.E3—Shares of money income from earnings and other sources for aged and nonaged families, 2002

| 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 ^a | Total | Nonpoor | Poor ^a | Total | Nonpoor | Poor ^a | Total | Nonpoor | Poor ^a |
| Number of families and unrelated individuals (millions) | 11.3 | 9.1 | 2.2 | 11.7 | 11 | 0.7 | 35.8 | 28.2 | 7.6 | 63.9 | 57.4 | 6.5 |
| Percentage receiving income of specified type^b | | | | | | | | | | | | |
| Earnings | 15 | 17 | 3 | 43 | 44 | 18 | 81 | 93 | 38 | 94 | 97 | 66 |
| Public program payments | | | | | | | | | | | | |
| Social Security ^c | 92 | 94 | 83 | 91 | 93 | 66 | 7 | 5 | 11 | 10 | 10 | 12 |
| Supplemental Security Income | 6 | 2 | 19 | 4 | 4 | 17 | 4 | 1 | 11 | 3 | 2 | 9 |
| Other public assistance | 2 | 2 | 2 | 3 | 3 | 6 | 10 | 9 | 14 | 11 | 10 | 23 |
| Other programs ^d | 5 | 5 | 2 | 8 | 9 | 5 | 7 | 8 | 4 | 12 | 12 | 8 |
| Other sources | | | | | | | | | | | | |
| Dividends, interest, rent | 54 | 61 | 25 | 64 | 67 | 30 | 42 | 50 | 15 | 58 | 62 | 17 |
| Employment-related pensions, alimony, annuities | 38 | 46 | 7 | 51 | 54 | 12 | 6 | 7 | 3 | 16 | 16 | 16 |
| Percentage distribution of income, by type | | | | | | | | | | | | |
| Total percent | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Earnings | 17 | 18 | 1 | 34 | 34 | 11 | 88 | 89 | 46 | 91 | 91 | 66 |
| Public program payments | | | | | | | | | | | | |
| Social Security ^c | 45 | 42 | 84 | 33 | 33 | 66 | 2 | 1 | 19 | 2 | 2 | 10 |
| Supplemental Security Income | 1 | 1 | 9 | 1 | ^e | 9 | 1 | ^e | 16 | ^e | ^e | 6 |
| Other public assistance | 1 | 1 | ^e | ^e | ^e | 2 | 2 | 2 | 10 | 1 | 1 | 9 |
| Other programs ^d | 2 | 2 | 1 | 1 | 1 | 2 | 1 | 1 | 4 | 1 | 1 | 3 |
| Other sources | | | | | | | | | | | | |
| Dividends, interest, rent | 16 | 17 | 2 | 11 | 12 | 3 | 3 | 3 | 2 | 3 | 3 | 1 |
| Employment-related pensions, alimony, annuities | 19 | 20 | 3 | 19 | 19 | 7 | 3 | 3 | 3 | 3 | 3 | 5 |
| Median income (dollars) | 14,503 | 17,008 | 6,108 | 33,803 | 35,703 | 8,614 | 23,970 | 30,273 | 3,792 | 55,973 | 56,403 | 8,915 |

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2003 Income Supplement.

NOTES: Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, Series P-60.

- a. Poverty status based on money income of all family members after receipt of Social Security and any other cash transfer payments.
- b. Received by individuals or any family member at any time during 2002. 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 0.5 percent.

CONTACT: Curt Pauzenga (410) 965-7210.

Table 3.E4—Current living arrangements of persons aged 65 or older, by sex and poverty status, March 2003

| Living arrangement | Population (thousands) | | | Percentage distribution | | | Percentage officially poor |
|-------------------------------------|------------------------|-------|---------|-------------------------|-------|---------|----------------------------|
| | Total | Poor | Nonpoor | Total | Poor | Nonpoor | |
| All persons aged 65 or older | | | | | | | |
| Total | 34,234 | 3,576 | 30,658 | 100.0 | 100.0 | 100.0 | 10.4 |
| Unrelated individuals | 11,336 | 2,206 | 9,131 | 33.1 | 61.7 | 29.8 | 19.5 |
| Family members | 22,897 | 1,370 | 21,527 | 66.9 | 38.3 | 70.2 | 6.0 |
| Householder or spouse | 20,610 | 1,212 | 19,398 | 60.2 | 33.9 | 63.3 | 5.9 |
| Other relative ^a | 2,287 | 159 | 2,128 | 6.7 | 4.4 | 6.9 | 6.9 |
| Poor by own income | 921 | 121 | 801 | 2.7 | 3.4 | 2.6 | 13.1 |
| Not poor by own income | 1,366 | 38 | 1,328 | 4.0 | 1.1 | 4.3 | 2.8 |
| Men | | | | | | | |
| Subtotal | 14,528 | 1,125 | 13,403 | 42.4 | 31.5 | 43.7 | 7.7 |
| Unrelated individuals | 3,155 | 507 | 2,648 | 9.2 | 14.2 | 8.6 | 16.1 |
| Family members | 11,373 | 618 | 10,755 | 33.2 | 17.3 | 35.1 | 5.4 |
| Householder | 7,791 | 423 | 7,367 | 22.8 | 11.8 | 24.0 | 5.4 |
| Spouse of householder | 2,986 | 158 | 2,828 | 8.7 | 4.4 | 9.2 | 5.3 |
| Other relative ^a | 597 | 37 | 560 | 1.7 | 1.0 | 1.8 | 6.2 |
| Poor by own income | 193 | 30 | 163 | 0.6 | 0.8 | 0.5 | 15.5 |
| Not poor by own income | 404 | 7 | 397 | 1.2 | 0.2 | 1.3 | 1.8 |
| Women | | | | | | | |
| Subtotal | 19,706 | 2,451 | 17,255 | 57.6 | 68.5 | 56.3 | 12.4 |
| Unrelated individuals | 8,182 | 1,699 | 6,483 | 23.9 | 47.5 | 21.1 | 20.8 |
| Family members | 11,524 | 752 | 10,772 | 33.7 | 21.0 | 35.1 | 6.5 |
| Householder, no husband present | 1,748 | 234 | 1,514 | 5.1 | 6.5 | 4.9 | 13.4 |
| Householder with husband present | 2,342 | 113 | 2,229 | 6.8 | 3.2 | 7.3 | 4.8 |
| Wife of householder | 5,744 | 284 | 5,460 | 16.8 | 7.9 | 17.8 | 4.9 |
| Other relative ^a | 1,690 | 121 | 1,569 | 4.9 | 3.4 | 5.1 | 7.2 |
| Poor by own income | 729 | 91 | 638 | 2.1 | 2.5 | 2.1 | 12.4 |
| Not poor by own income | 962 | 31 | 931 | 2.8 | 0.9 | 3.0 | 3.2 |

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2003 Income Supplement.

NOTES: Living arrangements as of March 2003.

Poverty status in 2002 as reflected by income of unrelated individual or family money income for year compared with official poverty income criterion for families of appropriate size and composition.

Table includes civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, Series P-60.

- a. Aged family members who are neither the family householder nor the spouse of the householder. Official poverty classification is based on combined income of all related persons living together. Persons in this group are classified here on the basis of official poverty criteria for family income and on a comparison of their own income with official poverty criteria for elderly persons maintaining their own households. The hidden poor are other relatives in nonpoor households whose own income is below the official poverty line for unrelated individuals or married couples.

CONTACT: Curt Pauzenga (410) 965-7210.

3.E Poverty

Table 3.E6—Percentage distribution of aged families receiving Social Security benefits, by share of income from benefits and race, 2002

| Social Security share of money income for year ^a | 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 |
| All races ^b | | | | | | | | |
| Number (thousands) | 11,321 | 9,125 | 2,196 | ... | 12,026 | 11,180 | 845 | ... |
| Percent | 100 | 100 | 100 | 19 | 100 | 100 | 100 | 7 |
| No Social Security benefits | 8 | 6 | 17 | 38 | 9 | 7 | 35 | 26 |
| Some Social Security benefits | 92 | 94 | 83 | 18 | 91 | 93 | 65 | 5 |
| Less than one-fourth of income | 10 | 12 | 1 | 2 | 21 | 22 | 1 | 0 |
| One-fourth to one-half of income | 16 | 20 | 2 | 3 | 24 | 26 | 4 | 1 |
| One-half to three-fourths of income | 19 | 21 | 9 | 9 | 19 | 20 | 9 | 3 |
| Three-fourths or more of income | 47 | 41 | 71 | 29 | 26 | 24 | 51 | 14 |
| White | | | | | | | | |
| Number (thousands) | 9,947 | 8,233 | 1,714 | ... | 10,322 | 9,776 | 546 | ... |
| Percent | 100 | 100 | 100 | 17 | 100 | 100 | 100 | 5 |
| No Social Security benefits | 7 | 6 | 15 | 35 | 8 | 6 | 36 | 24 |
| Some Social Security benefits | 93 | 94 | 85 | 16 | 92 | 94 | 64 | 4 |
| Less than one-fourth of income | 10 | 12 | 1 | 1 | 21 | 22 | 1 | 0 |
| One-fourth to one-half of income | 17 | 20 | 3 | 3 | 25 | 27 | 3 | 1 |
| One-half to three-fourths of income | 19 | 21 | 8 | 7 | 20 | 21 | 8 | 2 |
| Three-fourths or more of income | 47 | 41 | 74 | 27 | 25 | 24 | 52 | 11 |
| Black | | | | | | | | |
| Number (thousands) | 1,092 | 690 | 402 | ... | 981 | 801 | 180 | ... |
| Percent | 100 | 100 | 100 | 37 | 100 | 100 | 100 | 18 |
| No Social Security benefits | 14 | 12 | 18 | 46 | 15 | 12 | 27 | 33 |
| Some Social Security benefits | 86 | 88 | 82 | 35 | 85 | 88 | 73 | 16 |
| Less than one-fourth of income | 7 | 9 | 3 | 17 | 21 | 25 | 2 | 2 |
| One-fourth to one-half of income | 12 | 18 | 2 | 5 | 20 | 23 | 5 | 5 |
| One-half to three-fourths of income | 16 | 19 | 11 | 25 | 16 | 16 | 14 | 16 |
| Three-fourths or more of income | 51 | 42 | 67 | 48 | 29 | 23 | 52 | 34 |

SOURCE: U.S. Census Bureau, Current Population Survey, public-use file of the March 2003 Income Supplement.

NOTES: Civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

For a discussion of standard errors of estimated numbers and percentages, see Bureau of the Census, *Current Population Reports*, Series P-60.

... = not applicable.

a. Payments under Social Security program any time in 2002 to any family member as reported in the March 2003 Current Population Survey.

b. Includes other races.

CONTACT: Curt Pauzenga (410) 965-7210.

Table 3.E8—Poverty guidelines for families of specified size, 1965–2004 (dollars)

| Date of issuance ^a | 1 person | 2 persons | 3 persons | 4 persons | 5 persons | 6 persons | 7 persons | 8 persons | Increment ^b |
|-------------------------------|----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|------------------------|
| December 1965 | 1,540 | 1,990 | 2,440 | 3,130 | 3,685 | 4,135 | 4,635 | 5,135 | 500 |
| August 1967 | 1,600 | 2,000 | 2,500 | 3,200 | 3,800 | 4,200 | 4,700 | 5,300 | 500 |
| September 1968 | 1,600 | 2,100 | 2,600 | 3,300 | 3,900 | 4,400 | 4,900 | 5,400 | 500 |
| September 1969 | 1,800 | 2,400 | 3,000 | 3,600 | 4,200 | 4,800 | 5,400 | 6,000 | 600 |
| December 1970 | 1,900 | 2,500 | 3,100 | 3,800 | 4,400 | 5,000 | 5,600 | 6,200 | 600 |
| November 1971 | 2,000 | 2,600 | 3,300 | 4,000 | 4,700 | 5,300 | 5,900 | 6,500 | 600 |
| October 1972 | 2,100 | 2,725 | 3,450 | 4,200 | 4,925 | 5,550 | 6,200 | 6,850 | 650 |
| March 1973 | 2,200 | 2,900 | 3,600 | 4,300 | 5,000 | 5,700 | 6,400 | 7,100 | 700 |
| May 1974 | 2,330 | 3,070 | 3,810 | 4,550 | 5,290 | 6,030 | 6,770 | 7,510 | 740 |
| March 1975 | 2,590 | 3,410 | 4,230 | 5,050 | 5,870 | 6,690 | 7,510 | 8,330 | 820 |
| April 1976 | 2,800 | 3,700 | 4,600 | 5,500 | 6,400 | 7,300 | 8,200 | 9,100 | 900 |
| April 1977 | 2,970 | 3,930 | 4,890 | 5,850 | 6,810 | 7,770 | 8,730 | 9,690 | 960 |
| April 1978 | 3,140 | 4,160 | 5,180 | 6,200 | 7,220 | 8,240 | 9,260 | 10,280 | 1,020 |
| May 1979 | 3,400 | 4,500 | 5,600 | 6,700 | 7,800 | 8,900 | 10,000 | 11,100 | 1,100 |
| April 1980 | 3,790 | 5,010 | 6,230 | 7,450 | 8,670 | 9,890 | 11,110 | 12,330 | 1,220 |
| March 1981 | 4,310 | 5,690 | 7,070 | 8,450 | 9,830 | 11,210 | 12,590 | 13,970 | 1,380 |
| April 1982 | 4,680 | 6,220 | 7,760 | 9,300 | 10,840 | 12,380 | 13,920 | 15,460 | 1,540 |
| February 1983 | 4,860 | 6,540 | 8,220 | 9,900 | 11,580 | 13,260 | 14,940 | 16,620 | 1,680 |
| February 1984 | 4,980 | 6,720 | 8,460 | 10,200 | 11,940 | 13,680 | 15,420 | 17,160 | 1,740 |
| March 1985 | 5,250 | 7,050 | 8,850 | 10,650 | 12,450 | 14,250 | 16,050 | 17,850 | 1,800 |
| February 1986 | 5,360 | 7,240 | 9,120 | 11,000 | 12,880 | 14,760 | 16,640 | 18,520 | 1,880 |
| February 1987 | 5,500 | 7,400 | 9,300 | 11,200 | 13,100 | 15,000 | 16,900 | 18,800 | 1,900 |
| February 1988 | 5,770 | 7,730 | 9,690 | 11,650 | 13,610 | 15,570 | 17,530 | 19,490 | 1,960 |
| February 1989 | 5,980 | 8,020 | 10,060 | 12,100 | 14,140 | 16,180 | 18,220 | 20,260 | 2,040 |
| February 1990 | 6,280 | 8,420 | 10,560 | 12,700 | 14,840 | 16,980 | 18,120 | 21,260 | 2,140 |
| February 1991 | 6,620 | 8,880 | 11,140 | 13,400 | 15,660 | 17,920 | 20,180 | 22,440 | 2,260 |
| February 1992 | 6,810 | 9,190 | 11,570 | 13,950 | 16,330 | 18,710 | 21,090 | 23,470 | 2,380 |
| February 1993 | 6,970 | 9,430 | 11,890 | 14,350 | 16,810 | 19,270 | 21,730 | 24,190 | 2,460 |
| February 1994 | 7,360 | 9,840 | 12,320 | 14,800 | 17,280 | 19,760 | 22,240 | 24,720 | 2,480 |

(Continued)

3.E Poverty

Table 3.E8—Poverty guidelines for families of specified size, 1965–2004 (dollars)—Continued

| Date of issuance ^a | 1 person | 2 persons | 3 persons | 4 persons | 5 persons | 6 persons | 7 persons | 8 persons | Increment ^b |
|-------------------------------|----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|------------------------|
| February 1995 | 7,470 | 10,030 | 12,590 | 15,150 | 17,710 | 20,270 | 22,830 | 25,390 | 2,560 |
| March 1996 | 7,740 | 10,360 | 12,980 | 15,600 | 18,220 | 20,840 | 23,460 | 26,080 | 2,620 |
| March 1997 | 7,890 | 10,610 | 13,330 | 16,050 | 18,770 | 21,490 | 24,210 | 26,960 | 2,720 |
| February 1998 | 8,050 | 10,850 | 13,650 | 16,450 | 19,250 | 22,050 | 24,850 | 27,650 | 2,800 |
| March 1999 | 8,240 | 11,060 | 13,880 | 16,700 | 19,520 | 22,340 | 25,160 | 27,980 | 2,820 |
| February 2000 | 8,350 | 11,250 | 14,150 | 17,050 | 19,950 | 22,850 | 25,750 | 28,650 | 2,900 |
| February 2001 | 8,590 | 11,610 | 14,630 | 17,650 | 20,670 | 23,690 | 26,710 | 29,730 | 3,020 |
| February 2002 | 8,860 | 11,940 | 15,020 | 18,100 | 21,180 | 24,260 | 27,340 | 30,420 | 3,080 |
| February 2003 | 8,980 | 12,120 | 15,260 | 18,400 | 21,540 | 24,680 | 27,820 | 30,960 | 3,140 |
| February 2004 | 9,310 | 12,490 | 15,670 | 18,850 | 22,030 | 25,210 | 28,390 | 31,570 | 3,180 |

SOURCE: Department of Health and Human Services, *Federal Register*, vol. 69, no. 30, February 13, 2004, pp. 7335–7338.

NOTES: Except for Alaska and Hawaii. Guidelines for Alaska and Hawaii since 1980 are:

| Year | Alaska | | Hawaii | |
|------|----------|-----------|----------|-----------|
| | 1 person | Increment | 1 person | Increment |
| 1980 | 4,760 | 1,520 | 4,370 | 1,400 |
| 1981 | 5,410 | 1,720 | 4,980 | 1,580 |
| 1982 | 5,870 | 1,920 | 5,390 | 1,770 |
| 1983 | 6,080 | 2,100 | 5,600 | 1,930 |
| 1984 | 6,240 | 2,170 | 5,730 | 2,000 |
| 1985 | 6,560 | 2,250 | 6,040 | 2,070 |
| 1986 | 6,700 | 2,350 | 6,170 | 2,160 |
| 1987 | 6,860 | 2,380 | 6,310 | 2,190 |
| 1988 | 7,210 | 2,450 | 6,650 | 2,250 |
| 1989 | 7,480 | 2,550 | 6,870 | 2,350 |
| 1990 | 7,840 | 2,680 | 7,230 | 2,460 |
| 1991 | 8,290 | 2,820 | 7,610 | 2,600 |
| 1992 | 8,500 | 2,980 | 7,830 | 2,740 |
| 1993 | 8,700 | 3,080 | 8,040 | 2,820 |
| 1994 | 9,200 | 3,100 | 8,470 | 2,850 |
| 1995 | 9,340 | 3,200 | 8,610 | 2,940 |
| 1996 | 9,660 | 3,280 | 8,910 | 3,010 |
| 1997 | 9,870 | 3,400 | 9,070 | 3,130 |
| 1998 | 10,070 | 3,500 | 9,260 | 3,220 |
| 1999 | 10,320 | 3,520 | 9,490 | 3,240 |
| 2000 | 10,430 | 3,630 | 9,590 | 3,340 |
| 2001 | 10,730 | 3,780 | 9,890 | 3,470 |
| 2002 | 11,080 | 3,850 | 10,200 | 3,540 |
| 2003 | 11,210 | 3,930 | 10,330 | 3,610 |
| 2004 | 11,630 | 3,980 | 10,700 | 3,660 |

Separate figures for Alaska and Hawaii reflect Office of Economic Opportunity administrative practice beginning in the 1966–1970 period. The U.S. Census Bureau, producer of the primary version of the poverty measure (the poverty thresholds), does not produce separate figures for Alaska and Hawaii.

Before 1983, the guidelines shown are for nonfarm families only.

- The guidelines are effective from the date of issuance (unless otherwise specified by a particular program using them).
- Add this amount for each additional family member. Before 1973, increments between some of the smaller family sizes differed from the increment shown in the table. Beginning in 1973, the increment has been the same for all family sizes in each year's set of guidelines.

CONTACT: Gordon Fisher (202) 690-5880.

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

| | |
|------------------------|-------------|
| Trust Funds | 4.1 |
| Covered Workers | 4.12 |
| Insured Workers | 4.36 |

Table 4.A1—Old-Age and Survivors Insurance, selected years 1937–2003 (in millions of dollars)

| Year | Receipts | | | | | Expenditures | | | | Assets | |
|------|----------|--------------------------------|----------------------------------|---|---------------------------|--------------|-------------------------------|-------------------------|--|--------------------------|-----------------------|
| | Total | Net contributions ^a | Income from taxation of benefits | Payments from the general fund of the Treasury ^b | Net interest ^c | Total | Benefit payments ^d | Administrative expenses | Transfers to Railroad Retirement program | Net increase during year | Amount at end of year |
| 1937 | 767 | 765 | ... | ... | 2 | 1 | 1 | ... | ... | 766 | 766 |
| 1938 | 375 | 360 | ... | ... | 15 | 10 | 10 | ... | ... | 366 | 1,132 |
| 1939 | 607 | 580 | ... | ... | 27 | 14 | 14 | ... | ... | 592 | 1,724 |
| 1940 | 368 | 325 | ... | ... | 43 | 62 | 35 | 26 | ... | 306 | 2,031 |
| 1945 | 1,420 | 1,285 | ... | ... | 134 | 304 | 274 | 30 | ... | 1,116 | 7,121 |
| 1950 | 2,928 | 2,667 | ... | 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 |
| 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 | ^e 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 | ^e 8,725 | 35,842 |
| 1986 | 197,393 | 190,741 | 3,424 | 160 | 3,069 | 181,000 | 176,813 | 1,601 | 2,585 | ^e 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 |

(Continued)

4.A OASDI: Trust Funds

Table 4.A1—Old-Age and Survivors Insurance, selected years 1937–2003 (in millions of dollars)—Continued

| Year | Receipts | | | | | Expenditures | | | | Assets | |
|------|----------|--------------------------------|----------------------------------|---|---------------------------|--------------|-------------------------------|-------------------------|--|--------------------------|-----------------------|
| | Total | Net contributions ^a | Income from taxation of benefits | Payments from the general fund of the Treasury ^b | Net interest ^c | Total | Benefit payments ^d | Administrative expenses | Transfers to Railroad Retirement program | Net increase during year | Amount at end of year |
| 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 |
| 2002 | 539,706 | 455,199 | 12,909 | 414 | 71,184 | 393,749 | 388,119 | 2,137 | 3,493 | 145,957 | 1,217,497 |
| 2003 | 543,811 | 456,077 | 12,497 | ... | 75,237 | 405,978 | 399,845 | 2,553 | 3,580 | 137,833 | 1,355,330 |

SOURCE: Department of the Treasury.

NOTES: Data for all years can be found at <http://www.socialsecurity.gov/OACT/STATS/table4a1.html>.

... = not applicable.

- a. Beginning in 1983, includes transfers from the general fund of the Treasury representing contributions that would have been paid on deemed wage credits for military service in 1957–2001, if such credits were considered to be covered wages.
- b. 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. The amount shown for 1985 includes an interest adjustment of \$88 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.

CONTACT: Jeff Kunkel (410) 965-3013.

Table 4.A2—Disability Insurance, 1957–2003 (in millions of dollars)

| Year | Receipts | | | | | Expenditures | | | | Assets | |
|------|----------|--------------------------------|----------------------------------|---|---------------------------|--------------|-------------------------------|-------------------------|--|--------------------------|-----------------------|
| | Total | Net contributions ^a | Income from taxation of benefits | Payments from the general fund of the Treasury ^b | Net interest ^c | Total | Benefit payments ^d | Administrative expenses | Transfers to Railroad Retirement program | Net increase during year | Amount at end of year |
| 1957 | 709 | 702 | ... | ... | 7 | 59 | 57 | 3 | ... | 649 | 649 |
| 1958 | 991 | 966 | ... | ... | 25 | 261 | 249 | 12 | ... | 729 | 1,379 |
| 1959 | 931 | 891 | ... | ... | 40 | 485 | 457 | 50 | -22 | 447 | 1,825 |
| 1960 | 1,063 | 1,010 | ... | ... | 53 | 600 | 568 | 36 | -5 | 464 | 2,289 |
| 1961 | 1,104 | 1,038 | ... | ... | 66 | 956 | 887 | 64 | 5 | 148 | 2,437 |
| 1962 | 1,114 | 1,046 | ... | ... | 68 | 1,183 | 1,105 | 66 | 11 | -69 | 2,368 |
| 1963 | 1,165 | 1,099 | ... | ... | 66 | 1,297 | 1,210 | 68 | 20 | -133 | 2,235 |
| 1964 | 1,218 | 1,154 | ... | ... | 64 | 1,407 | 1,309 | 79 | 19 | -188 | 2,047 |
| 1965 | 1,247 | 1,188 | ... | ... | 59 | 1,687 | 1,573 | 90 | 24 | -440 | 1,606 |
| 1966 | 2,079 | 2,006 | ... | 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 |

(Continued)

4.A OASDI: Trust Funds

Table 4.A2—Disability Insurance, 1957–2003 (in millions of dollars)—Continued

| Year | Receipts | | | | | Expenditures | | | | Assets | |
|------|----------|--------------------------------|----------------------------------|---|---------------------------|--------------|-------------------------------|-------------------------|--|--------------------------|-----------------------|
| | Total | Net contributions ^a | Income from taxation of benefits | Payments from the general fund of the Treasury ^b | Net interest ^c | Total | Benefit payments ^d | Administrative expenses | Transfers to Railroad Retirement program | Net increase during year | Amount at end of year |
| 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 |
| 2002 | 87,379 | 77,272 | 930 | ... | 9,178 | 67,905 | 65,702 | 2,049 | 154 | 19,475 | 160,468 |
| 2003 | 88,074 | 77,442 | 944 | ... | 9,689 | 73,108 | 70,933 | 2,008 | 167 | 14,966 | 175,434 |

SOURCE: Department of the Treasury.

NOTE: ... = not applicable.

- Beginning in 1983, includes transfers from the general fund of the Treasury representing contributions that would have been paid on deemed wage credits for military service in 1957–2001, if such credits were considered to be covered wages.
- 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.
- 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.
- 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.
- Less than \$500,000.
- Amount equals total receipts less total expenditures, less amounts loaned or plus amounts repaid under interfund borrowing provisions.
- Reflects \$195 million in transfers from the DI trust fund to the general fund of the Treasury to correct estimated amounts transferred for calendar years 1984 and 1985.

CONTACT: Jeff Kunkel (410) 965-3013.

Table 4.A3—Combined OASI and DI, 1957–2003 (in millions of dollars)

| Year | Receipts | | | | | Expenditures | | | | Assets | |
|------|----------|--------------------------------|----------------------------------|---|---------------------------|--------------|-------------------------------|-------------------------|--|--------------------------|-----------------------|
| | Total | Net contributions ^a | Income from taxation of benefits | Payments from the general fund of the Treasury ^b | Net interest ^c | Total | Benefit payments ^d | Administrative expenses | Transfers to Railroad Retirement program | Net increase during year | Amount at end of year |
| 1957 | 8,090 | 7,527 | ... | ... | 563 | 7,567 | 7,404 | 164 | -2 | 523 | 23,042 |
| 1958 | 9,108 | 8,531 | ... | ... | 577 | 8,907 | 8,576 | 207 | 124 | 201 | 23,243 |
| 1959 | 9,516 | 8,943 | ... | ... | 572 | 10,793 | 10,298 | 234 | 260 | -1,277 | 21,966 |
| 1960 | 12,445 | 11,876 | ... | ... | 569 | 11,798 | 11,245 | 240 | 314 | 647 | 22,613 |
| 1961 | 12,937 | 12,323 | ... | ... | 614 | 13,388 | 12,749 | 303 | 337 | -451 | 22,162 |
| 1962 | 13,699 | 13,105 | ... | ... | 594 | 15,156 | 14,461 | 322 | 372 | -1,457 | 20,705 |
| 1963 | 16,227 | 15,640 | ... | ... | 587 | 16,217 | 15,427 | 348 | 442 | 10 | 20,715 |
| 1964 | 17,476 | 16,843 | ... | ... | 633 | 17,020 | 16,223 | 375 | 422 | 456 | 21,172 |
| 1965 | 17,857 | 17,205 | ... | ... | 651 | 19,187 | 18,311 | 418 | 459 | -1,331 | 19,841 |
| 1966 | 23,381 | 22,585 | ... | 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 | ^e 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 | ^e 11,088 | 42,163 |
| 1986 | 216,833 | 209,140 | 3,662 | 160 | 3,871 | 201,522 | 196,667 | 2,202 | 2,653 | ^e 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 |

(Continued)

4.A OASDI: Trust Funds

Table 4.A3—Combined OASI and DI, 1957–2003 (in millions of dollars)—Continued

| Year | Receipts | | | | | Expenditures | | | | Assets | |
|------|----------|--------------------------------|----------------------------------|---|---------------------------|--------------|-------------------------------|-------------------------|--|--------------------------|-----------------------|
| | Total | Net contributions ^a | Income from taxation of benefits | Payments from the general fund of the Treasury ^b | Net interest ^c | Total | Benefit payments ^d | Administrative expenses | Transfers to Railroad Retirement program | Net increase during year | Amount at end of year |
| 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 |
| 2002 | 627,085 | 532,471 | 13,839 | 414 | 80,362 | 461,653 | 453,821 | 4,185 | 3,647 | 165,432 | 1,377,965 |
| 2003 | 631,886 | 533,519 | 13,441 | ... | 84,926 | 479,086 | 470,778 | 4,562 | 3,747 | 152,799 | 1,530,764 |

SOURCE: Department of the Treasury.

NOTE: ... = not applicable.

- a. Beginning in 1983, includes transfers from the general fund of the Treasury representing contributions that would have been paid on deemed wage credits for military service in 1957–2001, if such credits were considered to be covered wages.
- b. 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. 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.

CONTACT: Jeff Kunkel (410) 965-3013.

Table 4.A4—Total annual benefits paid, by type of benefit and trust fund, and as a percentage of personal income, selected years 1937–2003 (in millions of dollars)

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

(Continued)

4.A OASDI: Trust Funds

Table 4.A4—Total annual benefits paid, by type of benefit and trust fund, and as a percentage of personal income, selected years 1937–2003 (in millions of dollars)—Continued

| Year | Total benefits | Cash benefits ^a | | Service benefits | | Rehabilitation services ^b | | Personal income ^c | Total benefits as percentage of personal income |
|------|----------------|--|----------------------|--------------------|---------------------------------|--------------------------------------|----------------------|------------------------------|---|
| | | Old-Age and Survivors Insurance ^d | Disability Insurance | Hospital Insurance | Supplementary Medical Insurance | Old-Age and Survivors Insurance | Disability Insurance | | |
| 1995 | 513,959 | 291,682 | 40,898 | 116,368 | 64,972 | ... | 39 | 6,152,300 | 8.4 |
| 1996 | 544,350 | 302,914 | 44,174 | 128,632 | 68,598 | ... | 31 | 6,520,600 | 8.3 |
| 1997 | 572,542 | 316,311 | 45,659 | 137,762 | 72,757 | ... | 53 | 6,915,100 | 8.3 |
| 1998 | 585,156 | 326,817 | 48,173 | 133,990 | 76,125 | ... | 51 | 7,423,000 | 7.9 |
| 1999 | 595,326 | 334,437 | 51,331 | 128,766 | 80,724 | ... | 68 | 7,802,400 | 7.6 |
| 2000 | 625,060 | 352,706 | 54,938 | 128,458 | 88,893 | ... | 63 | 8,429,700 | 7.4 |
| 2001 | 672,853 | 372,370 | 59,577 | 141,183 | 99,663 | ... | 60 | 8,724,100 | 7.7 |
| 2002 | 714,804 | 388,170 | 65,645 | 149,944 | 110,969 | ... | 75 | 8,878,900 | 8.1 |
| 2003 | 746,756 | 399,892 | 70,906 | 152,084 | 123,825 | 3 | 47 | 9,161,800 | 8.2 |

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

NOTE: ... = not applicable.

- a. Unnegotiated checks not deducted.
- b. Vocational rehabilitation services to disabled workers and disabled children under the 1965 Amendments to the Social Security Act and to disabled widow(er)s under the 1967 Amendments to the Social Security Act.
- c. Figures subject to revision.
- d. For 1937–1939, refunds and lump-sum death payments under the Social Security Act of 1935.
- e. Less than 0.05 percent.
- f. Less than \$500,000.

CONTACT: Jeff Kunkel (410) 965-3013.

**Table 4.A5—Total annual benefits paid from OASI trust fund, by type of benefit, selected years 1937–2003
(in millions of dollars)**

| Year | Total | Retired-worker and dependents benefits | | | Survivors benefits | | | | Special age-72 beneficiaries | Lump-sum death payments |
|------|---------|--|--------------------|----------|--------------------|-----------------------------|------------|---------|------------------------------|-------------------------|
| | | Retired workers | Wives and husbands | Children | Children | Widowed mothers and fathers | Widow(er)s | 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 |

(Continued)

4.A OASDI: Trust Funds

Table 4.A5—Total annual benefits paid from OASI trust fund, by type of benefit, selected years 1937–2003 (in millions of dollars)—Continued

| Year | Total | Retired-worker and dependents benefits | | | Survivors benefits | | | | Special age-72 beneficiaries | Lump-sum death payments |
|------|---------|--|--------------------|----------|--------------------|-----------------------------|------------|---------|------------------------------|-------------------------|
| | | Retired workers | Wives and husbands | Children | Children | Widowed mothers and fathers | Widow(er)s | Parents | | |
| 1995 | 291,682 | 205,315 | 17,348 | 1,715 | 10,717 | 1,573 | 54,761 | 32 | 3 | 218 |
| 1996 | 302,914 | 213,423 | 17,715 | 1,799 | 11,217 | 1,486 | 57,025 | 31 | 1 | 218 |
| 1997 | 316,311 | 223,554 | 18,154 | 1,882 | 11,660 | 1,466 | 59,349 | 30 | 1 | 216 |
| 1998 | 326,817 | 232,324 | 18,395 | 1,940 | 11,936 | 1,435 | 60,540 | 29 | 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 |
| 2002 | 388,170 | 281,624 | 19,884 | 2,475 | 13,690 | 1,476 | 68,782 | 25 | a | 213 |
| 2003 | 399,892 | 291,518 | 19,951 | 2,583 | 14,072 | 1,486 | 70,052 | 24 | a | 206 |

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

NOTES: Unnegotiated checks not deducted.

. . . = not applicable.

a. Less than \$500,000.

CONTACT: Jeff Kunkel (410) 965-3013.

Table 4.A6—Total annual benefits paid from DI trust fund, by type of benefit, 1957–2003 (in millions of dollars)

| Year | Total | Disabled workers | Wives and husbands | Children |
|------|--------|------------------|--------------------|----------|
| 1957 | 57 | 57 | ... | ... |
| 1958 | 249 | 246 | 1 | 1 |
| 1959 | 457 | 390 | 29 | 38 |
| 1960 | 568 | 489 | 32 | 48 |
| 1961 | 887 | 724 | 54 | 109 |
| 1962 | 1,105 | 888 | 68 | 149 |
| 1963 | 1,210 | 965 | 73 | 172 |
| 1964 | 1,309 | 1,044 | 79 | 186 |
| 1965 | 1,573 | 1,246 | 95 | 232 |
| 1966 | 1,781 | 1,394 | 108 | 280 |
| 1967 | 1,939 | 1,519 | 113 | 307 |
| 1968 | 2,294 | 1,804 | 131 | 360 |
| 1969 | 2,542 | 2,014 | 139 | 389 |
| 1970 | 3,067 | 2,448 | 165 | 454 |
| 1971 | 3,758 | 3,028 | 192 | 539 |
| 1972 | 4,473 | 3,626 | 224 | 623 |
| 1973 | 5,718 | 4,676 | 281 | 760 |
| 1974 | 6,903 | 5,662 | 320 | 920 |
| 1975 | 8,414 | 6,908 | 385 | 1,121 |
| 1976 | 9,966 | 8,190 | 447 | 1,328 |
| 1977 | 11,463 | 9,456 | 505 | 1,503 |
| 1978 | 12,513 | 10,315 | 541 | 1,657 |
| 1979 | 13,708 | 11,333 | 581 | 1,794 |
| 1980 | 15,437 | 12,816 | 638 | 1,983 |
| 1981 | 17,199 | 14,379 | 684 | 2,136 |
| 1982 | 17,338 | 14,811 | 652 | 1,875 |
| 1983 | 17,530 | 15,196 | 607 | 1,728 |
| 1984 | 17,900 | 15,623 | 536 | 1,741 |
| 1985 | 18,836 | 16,483 | 545 | 1,809 |
| 1986 | 19,847 | 17,409 | 547 | 1,890 |
| 1987 | 20,512 | 18,053 | 532 | 1,926 |
| 1988 | 21,692 | 19,165 | 529 | 1,999 |
| 1989 | 22,873 | 20,314 | 523 | 2,036 |
| 1990 | 24,803 | 22,113 | 531 | 2,159 |
| 1991 | 27,662 | 24,738 | 550 | 2,374 |
| 1992 | 31,091 | 27,856 | 572 | 2,663 |
| 1993 | 34,598 | 30,913 | 572 | 3,112 |
| 1994 | 37,717 | 33,711 | 579 | 3,428 |
| 1995 | 40,898 | 36,610 | 577 | 3,711 |
| 1996 | 44,174 | 39,625 | 515 | 4,034 |
| 1997 | 45,659 | 41,083 | 479 | 4,098 |
| 1998 | 48,173 | 43,467 | 457 | 4,249 |
| 1999 | 51,331 | 46,459 | 433 | 4,439 |
| 2000 | 54,938 | 49,848 | 421 | 4,670 |
| 2001 | 59,577 | 54,244 | 416 | 4,917 |
| 2002 | 65,645 | 59,886 | 423 | 5,337 |
| 2003 | 70,906 | 64,811 | 431 | 5,664 |

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

NOTES: Unnegotiated checks not deducted.

... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

4.B OASDI: Covered Workers

Table 4.B1—Number of workers with taxable earnings, amount of earnings, and Social Security numbers issued, selected years 1937–2003

| Year | Number ^a (thousands) | | | Earnings | | | | | | Social Security numbers issued ^b (thousands) |
|------|---------------------------------|-----------------------|---|--|-------------------------------|---------------------|------------------------------|------------------|--------|---|
| | Total | With maximum earnings | New entrants into covered employment ^c | Total in covered employment ^d (millions of dollars) | Reported taxable ^a | | Average per worker (dollars) | | | |
| | | | | | Amount (millions of dollars) | Percentage of total | Total earnings ^d | Reported taxable | | |
| 1937 | 32,900 | 1,031 | 32,900 | 32,200 | 29,620 | 92.0 | 979 | 900 | 37,139 | |
| 1940 | 35,390 | 1,196 | 4,430 | 35,700 | 32,970 | 92.4 | 1,009 | 932 | 5,227 | |
| 1945 | 46,390 | 6,361 | 3,480 | 71,600 | 62,950 | 87.9 | 1,543 | 1,357 | 3,321 | |
| 1950 | 48,280 | 13,936 | 2,520 | 109,800 | 87,500 | 79.7 | 2,274 | 1,812 | 2,891 | |
| 1951 | 58,120 | 14,270 | 6,000 | 148,900 | 120,770 | 81.1 | 2,562 | 2,078 | 4,927 | |
| 1952 | 59,580 | 16,606 | 3,500 | 159,900 | 128,640 | 80.5 | 2,684 | 2,159 | 4,363 | |
| 1953 | 60,840 | 19,013 | 3,090 | 173,000 | 135,870 | 78.5 | 2,844 | 2,233 | 3,464 | |
| 1954 | 59,610 | 18,866 | 2,360 | 171,900 | 133,520 | 77.7 | 2,884 | 2,240 | 2,743 | |
| 1955 | 65,200 | 16,704 | 4,760 | 196,100 | 157,540 | 80.3 | 3,008 | 2,416 | 4,323 | |
| 1956 | 67,610 | 19,236 | 3,660 | 216,800 | 170,720 | 78.8 | 3,207 | 2,525 | 4,376 | |
| 1957 | 70,590 | 21,095 | 3,380 | 233,900 | 181,380 | 77.5 | 3,314 | 2,569 | 3,639 | |
| 1958 | 69,770 | 21,328 | 2,450 | 236,500 | 180,720 | 76.4 | 3,390 | 2,590 | 2,290 | |
| 1959 | 71,700 | 19,112 | 3,180 | 255,000 | 202,310 | 79.3 | 3,556 | 2,822 | 3,388 | |
| 1960 | 72,530 | 20,310 | 3,130 | 265,200 | 207,000 | 78.1 | 3,656 | 2,854 | 3,415 | |
| 1961 | 72,820 | 21,265 | 2,990 | 270,700 | 209,640 | 77.4 | 3,717 | 2,879 | 3,370 | |
| 1962 | 74,280 | 23,154 | 3,360 | 289,000 | 219,050 | 75.8 | 3,891 | 2,949 | 4,519 | |
| 1963 | 75,540 | 24,570 | 3,520 | 302,300 | 225,550 | 74.6 | 4,002 | 2,986 | 8,617 | |
| 1964 | 77,430 | 26,717 | 3,890 | 324,500 | 236,390 | 72.8 | 4,191 | 3,053 | 5,623 | |
| 1965 | 80,680 | 29,136 | 4,620 | 351,700 | 250,730 | 71.3 | 4,359 | 3,108 | 6,131 | |
| 1966 | 84,600 | 20,498 | 5,080 | 390,700 | 312,540 | 80.0 | 4,618 | 3,694 | 6,506 | |
| 1967 | 87,040 | 22,948 | 4,530 | 422,300 | 329,960 | 78.1 | 4,852 | 3,791 | 5,920 | |
| 1968 | 89,380 | 19,120 | 4,830 | 460,000 | 375,840 | 81.7 | 5,147 | 4,205 | 5,862 | |
| 1969 | 92,060 | 22,577 | 5,160 | 502,800 | 402,550 | 80.1 | 5,462 | 4,373 | 6,289 | |
| 1970 | 93,090 | 24,224 | 4,440 | 531,600 | 415,600 | 78.2 | 5,711 | 4,464 | 6,132 | |
| 1971 | 93,340 | 26,404 | 4,470 | 559,700 | 426,960 | 76.3 | 5,996 | 4,574 | 6,401 | |
| 1972 | 96,240 | 24,074 | 5,150 | 617,900 | 484,110 | 78.3 | 6,420 | 5,030 | 9,564 | |
| 1973 | 99,830 | 20,250 | 5,670 | 686,700 | 561,850 | 81.8 | 6,879 | 5,628 | 10,038 | |
| 1974 | 101,330 | 15,310 | 4,940 | 746,700 | 636,760 | 85.3 | 7,369 | 6,284 | 7,998 | |
| 1975 | 100,200 | 15,070 | 4,120 | 787,600 | 664,660 | 84.4 | 7,860 | 6,633 | 8,164 | |
| 1976 | 102,600 | 15,330 | 4,700 | 874,700 | 737,700 | 84.3 | 8,525 | 7,190 | 9,043 | |
| 1977 | 105,800 | 15,700 | 5,070 | 960,100 | 816,550 | 85.0 | 9,075 | 7,718 | 7,724 | |
| 1978 | 110,600 | 17,050 | 5,460 | 1,092,600 | 915,600 | 83.8 | 9,879 | 8,278 | 5,260 | |
| 1979 | 112,700 | 11,236 | 4,883 | 1,222,200 | 1,067,000 | 87.3 | 10,845 | 9,468 | 5,213 | |
| 1980 | 113,000 | 9,903 | 4,243 | 1,328,800 | 1,180,700 | 88.9 | 11,759 | 10,449 | 5,984 | |
| 1981 | 113,000 | 8,594 | 4,090 | 1,450,900 | 1,294,100 | 89.2 | 12,840 | 11,452 | 5,581 | |
| 1982 | 111,800 | 7,929 | 3,408 | 1,516,600 | 1,365,300 | 90.0 | 13,565 | 12,212 | 5,362 | |
| 1983 | 112,100 | 7,044 | 3,914 | 1,615,200 | 1,454,100 | 90.0 | 14,409 | 12,971 | 6,699 | |
| 1984 | 116,300 | 7,421 | 4,743 | 1,800,800 | 1,608,800 | 89.3 | 15,484 | 13,833 | 5,980 | |
| 1985 | 119,800 | 7,766 | 4,756 | 1,936,800 | 1,722,600 | 88.9 | 16,167 | 14,379 | 5,720 | |
| 1986 | 122,900 | 7,624 | 4,641 | 2,081,800 | 1,844,400 | 88.6 | 16,939 | 15,007 | 5,711 | |
| 1987 | 125,600 | 7,735 | 4,956 | 2,237,000 | 1,960,000 | 87.6 | 17,811 | 15,605 | 11,621 | |
| 1988 | 129,600 | 8,483 | 5,489 | 2,432,800 | 2,088,400 | 85.8 | 18,772 | 16,114 | 11,370 | |
| 1989 | 131,700 | 8,110 | 4,856 | 2,578,700 | 2,239,500 | 86.8 | 19,580 | 17,005 | 8,049 | |
| 1990 | 133,600 | 7,575 | 4,012 | 2,703,800 | 2,358,000 | 87.2 | 20,238 | 17,650 | 9,054 | |
| 1991 | 133,000 | 7,483 | 3,541 | 2,760,500 | 2,422,500 | 87.8 | 20,756 | 18,214 | 7,509 | |
| 1992 | 134,000 | 7,667 | 3,918 | 2,917,800 | 2,532,900 | 86.8 | 21,775 | 18,902 | 6,819 | |
| 1993 | 136,100 | 7,617 | 4,204 | 3,022,900 | 2,636,100 | 87.2 | 22,211 | 19,369 | 5,893 | |
| 1994 | 138,200 | 7,518 | 4,591 | 3,197,000 | 2,785,200 | 87.1 | 23,133 | 20,153 | 5,816 | |

(Continued)

Table 4.B1—Number of workers with taxable earnings, amount of earnings, and Social Security numbers issued, selected years 1937–2003—Continued

| Year | Number ^a (thousands) | | | Earnings | | | | | Social Security numbers issued ^b (thousands) |
|-------------------|---------------------------------|-----------------------|---|--|-------------------------------|---------------------|------------------------------|------------------|---|
| | Total | With maximum earnings | New entrants into covered employment ^c | Total in covered employment ^d (millions of dollars) | Reported taxable ^a | | Average per worker (dollars) | | |
| | | | | | Amount (millions of dollars) | Percentage of total | Total earnings ^d | Reported taxable | |
| 1995 | 141,000 | 8,191 | 4,621 | 3,401,800 | 2,919,100 | 85.8 | 24,126 | 20,703 | 5,465 |
| 1996 | 143,400 | 8,682 | 4,620 | 3,587,600 | 3,073,500 | 85.7 | 25,018 | 21,433 | 5,533 |
| 1997 | 146,145 | 9,022 | 4,710 | 3,858,721 | 3,285,000 | 85.1 | 26,403 | 22,478 | 5,413 |
| 1998 | 148,786 | 9,372 | 4,904 | 4,172,641 | 3,524,900 | 84.5 | 28,045 | 23,691 | 5,288 |
| 1999 | 151,333 | 9,209 | 4,966 | 4,467,110 | 3,749,600 | 83.9 | 29,518 | 24,777 | 5,306 |
| 2000 ^e | 153,691 | 9,496 | 4,974 | 4,823,674 | 4,008,400 | 83.1 | 31,386 | 26,081 | 5,476 |
| 2001 ^e | 153,716 | 9,110 | 4,440 | 4,920,937 | 4,170,100 | 84.7 | 32,013 | 27,129 | 5,883 |
| 2002 ^f | 153,837 | 8,365 | 4,239 | 4,946,105 | 4,243,164 | 85.8 | 32,152 | 27,582 | 5,699 |
| 2003 ^g | 154,324 | ... | ... | 5,063,091 | 4,352,138 | 86.0 | 32,808 | 28,201 | 5,372 |

SOURCES: Social Security Administration, Master Earnings File, 1 percent sample; Bureau of Labor Statistics; and Bureau of Economic Analysis.

NOTE: ... = not available.

- 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, 419.4 million Social Security numbers have been issued. Some individuals have been issued more than one number.
- c. Workers reported with first taxable earnings under program in specified year. During 1937–2001, 313.7 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; employment data are preliminary estimates based on data from Bureau of Labor Statistics.
- g. Preliminary estimates based on data from Bureau of Labor Statistics and the Bureau of Economic Analysis.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B OASDI: Covered Workers

Table 4.B2—Number with taxable earnings and amount of earnings, by type of earnings, 1951–2003

| Year | Number ^a (thousands) | | Wage and salary | | | | | Self-employed | | | | |
|------|------------------------------------|---------------|---|--|---------------------------|------------------------------|-------------------------------|---|--|-------------------------------------|------------------------------|-------------------------------|
| | | | Total in covered employment ^b (millions of dollars) | Reported taxable | | Average per worker (dollars) | | Total in covered employment ^c (millions of dollars) | Reported taxable | | Average per worker (dollars) | |
| | Wage and salary | Self-employed | | Amount ^d (millions of dollars) | Percentage of total wages | Total wages ^b | Reported taxable ^d | | Amount ^d (millions of dollars) | Percentage of total self-employment | Total earnings ^c | Reported taxable ^d |
| 1951 | 54,630 | 4,190 | 132,500 | 111,250 | 84.0 | 2,425 | 2,036 | 16,400 | 9,520 | 58.0 | 3,914 | 2,272 |
| 1952 | 56,060 | 4,240 | 143,500 | 118,880 | 82.8 | 2,560 | 2,121 | 16,400 | 9,760 | 59.5 | 3,868 | 2,302 |
| 1953 | 57,220 | 4,340 | 156,000 | 125,840 | 80.7 | 2,726 | 2,199 | 17,000 | 10,030 | 59.0 | 3,917 | 2,311 |
| 1954 | 55,940 | 4,350 | 155,100 | 123,410 | 79.6 | 2,773 | 2,206 | 16,800 | 10,110 | 60.2 | 3,862 | 2,324 |
| 1955 | 59,560 | 6,810 | 171,600 | 141,810 | 82.6 | 2,881 | 2,381 | 24,500 | 15,730 | 64.2 | 3,598 | 2,310 |
| 1956 | 61,560 | 7,390 | 188,500 | 153,010 | 81.2 | 3,062 | 2,486 | 28,300 | 17,710 | 62.6 | 3,829 | 2,396 |
| 1957 | 64,730 | 7,150 | 205,500 | 163,990 | 79.8 | 3,175 | 2,533 | 28,400 | 17,390 | 61.2 | 3,972 | 2,432 |
| 1958 | 64,040 | 7,130 | 208,000 | 163,140 | 78.4 | 3,248 | 2,547 | 28,500 | 17,580 | 61.7 | 3,997 | 2,466 |
| 1959 | 66,000 | 7,060 | 225,100 | 183,620 | 81.6 | 3,411 | 2,782 | 29,900 | 18,690 | 62.5 | 4,235 | 2,647 |
| 1960 | 66,980 | 6,870 | 236,000 | 188,580 | 79.9 | 3,523 | 2,815 | 29,200 | 18,420 | 63.1 | 4,250 | 2,681 |
| 1961 | 67,360 | 6,790 | 240,700 | 190,850 | 79.3 | 3,573 | 2,833 | 30,000 | 18,790 | 62.6 | 4,418 | 2,767 |
| 1962 | 68,890 | 6,720 | 257,700 | 200,130 | 77.7 | 3,741 | 2,905 | 31,300 | 18,920 | 60.4 | 4,658 | 2,815 |
| 1963 | 70,310 | 6,590 | 270,600 | 206,840 | 76.4 | 3,849 | 2,942 | 31,700 | 18,710 | 59.0 | 4,810 | 2,839 |
| 1964 | 72,230 | 6,480 | 290,900 | 217,430 | 74.7 | 4,027 | 3,010 | 33,600 | 18,960 | 56.4 | 5,185 | 2,926 |
| 1965 | 75,430 | 6,550 | 311,400 | 230,830 | 74.1 | 4,128 | 3,060 | 40,300 | 19,900 | 49.4 | 6,153 | 3,038 |
| 1966 | 79,460 | 6,630 | 346,700 | 287,860 | 83.0 | 4,363 | 3,623 | 44,000 | 24,680 | 56.1 | 6,637 | 3,722 |
| 1967 | 82,020 | 6,470 | 377,500 | 305,670 | 81.0 | 4,603 | 3,727 | 44,800 | 24,290 | 54.2 | 6,924 | 3,754 |
| 1968 | 84,470 | 6,570 | 413,600 | 348,500 | 84.3 | 4,896 | 4,126 | 46,400 | 27,340 | 58.9 | 7,062 | 4,161 |
| 1969 | 87,200 | 6,350 | 455,700 | 375,010 | 82.3 | 5,226 | 4,301 | 47,100 | 27,540 | 58.5 | 7,417 | 4,337 |
| 1970 | 88,180 | 6,270 | 483,600 | 388,680 | 80.4 | 5,484 | 4,408 | 48,000 | 26,920 | 56.1 | 7,656 | 4,293 |
| 1971 | 88,460 | 6,290 | 509,000 | 399,550 | 78.5 | 5,754 | 4,517 | 50,700 | 27,410 | 54.1 | 8,060 | 4,358 |
| 1972 | 91,220 | 6,600 | 563,300 | 452,050 | 80.3 | 6,175 | 4,956 | 54,600 | 32,060 | 58.7 | 8,273 | 4,858 |
| 1973 | 94,610 | 7,100 | 624,400 | 523,450 | 83.8 | 6,600 | 5,533 | 62,300 | 38,400 | 61.6 | 8,775 | 5,408 |
| 1974 | 96,190 | 7,040 | 681,600 | 594,400 | 87.2 | 7,086 | 6,179 | 65,200 | 42,360 | 65.0 | 9,261 | 6,017 |
| 1975 | 94,900 | 7,000 | 717,200 | 621,100 | 86.6 | 7,557 | 6,545 | 70,400 | 43,560 | 61.9 | 10,057 | 6,223 |
| 1976 | 97,230 | 7,400 | 797,200 | 689,200 | 86.4 | 8,199 | 7,088 | 76,800 | 48,500 | 63.2 | 10,378 | 6,554 |
| 1977 | 100,450 | 7,480 | 879,500 | 763,600 | 86.8 | 8,935 | 7,602 | 80,600 | 52,950 | 65.7 | 10,775 | 7,079 |
| 1978 | 104,810 | 8,040 | 998,900 | 856,100 | 85.7 | 9,531 | 8,168 | 93,700 | 59,500 | 63.5 | 11,654 | 7,400 |
| 1979 | 106,900 | 8,200 | 1,122,000 | 997,500 | 88.9 | 10,496 | 9,331 | 100,200 | 69,500 | 69.4 | 12,220 | 8,476 |
| 1980 | 107,200 | 8,200 | 1,231,000 | 1,109,000 | 90.1 | 11,483 | 10,345 | 97,800 | 71,700 | 73.3 | 11,927 | 8,744 |
| 1981 | 107,300 | 8,250 | 1,352,000 | 1,220,000 | 90.2 | 12,600 | 11,370 | 98,900 | 74,100 | 74.9 | 11,988 | 8,982 |
| 1982 | 105,800 | 8,550 | 1,418,000 | 1,290,000 | 91.0 | 13,403 | 12,193 | 98,600 | 75,300 | 76.4 | 11,532 | 8,807 |
| 1983 | 105,900 | 9,200 | 1,502,000 | 1,369,000 | 91.1 | 14,183 | 12,927 | 113,200 | 85,100 | 75.2 | 12,304 | 9,250 |
| 1984 | 109,900 | 9,900 | 1,671,500 | 1,515,000 | 90.6 | 15,209 | 13,785 | 129,300 | 93,800 | 72.5 | 13,061 | 9,475 |
| 1985 | 113,100 | 10,600 | 1,794,500 | 1,621,000 | 90.3 | 15,866 | 14,332 | 142,300 | 101,600 | 71.4 | 13,425 | 9,585 |
| 1986 | 115,900 | 11,200 | 1,921,000 | 1,730,800 | 90.1 | 16,575 | 14,934 | 160,800 | 113,600 | 70.6 | 14,357 | 10,143 |
| 1987 | 118,200 | 12,000 | 2,057,100 | 1,835,100 | 89.2 | 17,404 | 15,525 | 179,900 | 124,900 | 69.4 | 14,992 | 10,408 |
| 1988 | 122,100 | 12,400 | 2,224,700 | 1,952,000 | 87.7 | 18,220 | 15,987 | 208,100 | 136,400 | 65.5 | 16,782 | 11,000 |
| 1989 | 123,900 | 12,900 | 2,367,800 | 2,096,000 | 88.5 | 19,111 | 16,917 | 210,900 | 143,500 | 68.0 | 16,349 | 11,124 |
| 1990 | 126,100 | 12,500 | 2,510,000 | 2,222,000 | 88.5 | 19,905 | 17,621 | 193,800 | 136,000 | 70.2 | 15,504 | 10,880 |
| 1991 | 125,200 | 12,800 | 2,565,000 | 2,283,000 | 89.0 | 20,487 | 18,235 | 195,500 | 139,500 | 71.4 | 15,273 | 10,898 |
| 1992 | 126,000 | 13,100 | 2,711,000 | 2,386,000 | 88.0 | 21,516 | 18,937 | 206,800 | 146,600 | 71.0 | 15,786 | 11,214 |
| 1993 | 128,100 | 13,200 | 2,808,900 | 2,483,400 | 88.4 | 21,927 | 19,386 | 214,000 | 152,700 | 71.4 | 16,212 | 11,568 |
| 1994 | 130,100 | 13,300 | 2,964,100 | 2,624,500 | 88.5 | 22,783 | 20,173 | 232,900 | 160,700 | 69.0 | 17,511 | 12,083 |

(Continued)

Table 4.B2—Number with taxable earnings and amount of earnings, by type of earnings, 1951–2003—Continued

| Year | Number ^a (thousands) | | Wage and salary | | | | | Self-employed | | | | |
|-------------------|------------------------------------|---------------|---|--|---------------------------|------------------------------|-------------------------------|---|--|-------------------------------------|------------------------------|-------------------------------|
| | | | Total in covered employment ^b (millions of dollars) | Reported taxable | | Average per worker (dollars) | | Total in covered employment ^c (millions of dollars) | Reported taxable | | Average per worker (dollars) | |
| | Wage and salary | Self-employed | | Amount ^d (millions of dollars) | Percentage of total wages | Total wages ^b | Reported taxable ^d | | Amount ^d (millions of dollars) | Percentage of total self-employment | Total earnings ^c | Reported taxable ^d |
| | | | | | | | | | | | | |
| 1995 | 132,800 | 13,500 | 3,159,100 | 2,754,300 | 87.2 | 23,788 | 20,740 | 242,700 | 164,800 | 67.9 | 17,978 | 12,207 |
| 1996 | 135,100 | 13,900 | 3,331,900 | 2,901,700 | 87.1 | 24,662 | 21,478 | 255,700 | 171,800 | 67.2 | 18,396 | 12,360 |
| 1997 | 137,765 | 14,020 | 3,586,721 | 3,104,300 | 86.5 | 26,035 | 22,533 | 272,000 | 180,700 | 66.4 | 19,401 | 12,889 |
| 1998 | 140,386 | 14,230 | 3,882,341 | 3,333,700 | 85.9 | 27,655 | 23,747 | 290,300 | 191,200 | 65.9 | 20,401 | 13,436 |
| 1999 | 142,703 | 14,500 | 4,159,210 | 3,547,300 | 85.3 | 29,146 | 24,858 | 307,900 | 202,300 | 65.7 | 21,234 | 13,952 |
| 2000 ^e | 145,046 | 14,725 | 4,498,374 | 3,798,900 | 84.5 | 31,013 | 26,191 | 325,300 | 209,500 | 64.4 | 22,092 | 14,228 |
| 2001 ^e | 144,921 | 14,875 | 4,591,237 | 3,953,600 | 86.1 | 31,681 | 27,281 | 329,700 | 216,500 | 65.7 | 22,165 | 14,555 |
| 2002 ^f | 144,897 | 15,150 | 4,602,609 | 4,015,000 | 87.2 | 31,765 | 27,709 | 343,496 | 228,164 | 66.4 | 22,673 | 15,060 |
| 2003 ^g | 145,059 | 15,126 | 4,698,461 | 4,110,100 | 87.5 | 32,390 | 28,334 | 364,630 | 242,038 | 66.4 | 24,106 | 16,001 |

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.

- a. Represents total number in specified type of employment. Persons with both types of covered employment during the year are included in each type.
- b. Total wages, including estimated amounts above the taxable limit.
- c. Reported self-employment net earnings.
- d. See Table 2.A3 for annual maximum taxable earnings.
- e. Preliminary data.
- f. Taxable earnings are preliminary estimates based on Social Security data; employment data are preliminary estimates based on data from Bureau of Labor Statistics.
- g. Preliminary estimates based on data from Bureau of Labor Statistics and the Bureau of Economic Analysis.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B OASDI: Covered Workers

Table 4.B3—Number of workers and median annual earnings, by type of earnings and sex, selected years 1937–2002

| Year | All workers ^a | | | Wage and salary | | | Self-employed ^b | | |
|-------------------|---------------------------|--------|--------|-----------------|--------|--------|----------------------------|-------|-------|
| | Total | Men | Women | Subtotal | Men | Women | Subtotal | Men | Women |
| | <i>Number (thousands)</i> | | | | | | | | |
| 1937 | 32,900 | 23,810 | 9,090 | 32,900 | 23,810 | 9,090 | ... | ... | ... |
| 1940 | 35,390 | 25,570 | 9,820 | 35,390 | 25,570 | 9,820 | ... | ... | ... |
| 1945 | 46,390 | 28,820 | 17,570 | 46,390 | 28,820 | 17,570 | ... | ... | ... |
| 1950 | 48,280 | 32,620 | 15,660 | 48,280 | 32,620 | 15,660 | ... | ... | ... |
| 1955 | 65,200 | 43,140 | 22,060 | 59,560 | 38,240 | 21,320 | 6,810 | 5,980 | 830 |
| 1960 | 72,530 | 47,900 | 24,630 | 66,980 | 43,100 | 23,880 | 6,870 | 5,990 | 880 |
| 1965 | 80,680 | 51,990 | 28,690 | 75,430 | 47,500 | 27,930 | 6,550 | 5,640 | 910 |
| 1970 | 93,090 | 57,330 | 35,760 | 88,180 | 53,180 | 35,000 | 6,270 | 5,370 | 900 |
| 1975 | 100,200 | 59,520 | 40,680 | 94,900 | 55,140 | 39,760 | 7,000 | 5,790 | 1,210 |
| 1980 | 113,000 | 64,288 | 48,712 | 107,200 | 59,751 | 47,449 | 8,200 | 6,407 | 1,793 |
| 1985 | 119,800 | 66,113 | 53,687 | 113,100 | 61,285 | 51,815 | 10,600 | 7,623 | 2,977 |
| 1986 | 122,900 | 67,412 | 55,488 | 115,900 | 62,398 | 53,502 | 11,200 | 7,932 | 3,268 |
| 1987 | 125,600 | 68,591 | 57,009 | 118,200 | 63,306 | 54,894 | 12,000 | 8,450 | 3,550 |
| 1988 | 129,600 | 70,596 | 59,004 | 122,100 | 65,270 | 56,830 | 12,400 | 8,630 | 3,770 |
| 1989 | 131,700 | 71,517 | 60,183 | 123,900 | 66,105 | 57,795 | 12,900 | 8,842 | 4,058 |
| 1990 | 133,600 | 72,291 | 61,309 | 126,100 | 67,064 | 59,036 | 12,500 | 8,526 | 3,974 |
| 1991 | 133,000 | 71,787 | 61,213 | 125,200 | 66,406 | 58,794 | 12,800 | 8,669 | 4,131 |
| 1992 | 134,000 | 72,016 | 61,984 | 126,000 | 66,543 | 59,457 | 13,100 | 8,797 | 4,303 |
| 1993 | 136,100 | 73,154 | 62,946 | 128,100 | 67,673 | 60,427 | 13,200 | 8,840 | 4,360 |
| 1994 | 138,200 | 73,989 | 64,211 | 130,100 | 68,481 | 61,619 | 13,300 | 8,840 | 4,460 |
| 1995 | 141,000 | 75,444 | 65,556 | 132,800 | 69,900 | 62,900 | 13,500 | 8,908 | 4,592 |
| 1996 | 143,400 | 76,241 | 67,158 | 135,100 | 70,670 | 64,429 | 13,900 | 9,074 | 4,826 |
| 1997 | 146,145 | 77,498 | 68,647 | 137,765 | 71,910 | 65,855 | 14,020 | 9,078 | 4,942 |
| 1998 | 148,786 | 78,671 | 70,115 | 140,386 | 73,111 | 67,275 | 14,230 | 9,108 | 5,122 |
| 1999 | 151,333 | 80,042 | 71,291 | 142,703 | 74,376 | 68,327 | 14,500 | 9,224 | 5,276 |
| 2000 ^c | 153,691 | 81,091 | 72,600 | 145,046 | 75,476 | 69,570 | 14,725 | 9,250 | 5,475 |
| 2001 ^c | 153,716 | 81,049 | 72,667 | 144,921 | 75,412 | 69,509 | 14,875 | 9,232 | 5,643 |
| 2002 ^c | 153,837 | 80,964 | 72,873 | 144,897 | 75,222 | 69,675 | 15,150 | 9,276 | 5,874 |

(Continued)

Table 4.B3—Number of workers and median annual earnings, by type of earnings and sex, selected years 1937–2002—Continued

| Year | All workers ^a | | | Wage and salary | | | Self-employed ^b | | |
|-------------------|---|--------|--------|-----------------|--------|--------|----------------------------|--------|--------|
| | Total | Men | Women | Subtotal | Men | Women | Subtotal | Men | Women |
| | <i>Median earnings ^d (dollars)</i> | | | | | | | | |
| 1937 | 761 | 945 | 484 | 761 | 945 | 484 | ... | ... | ... |
| 1940 | 746 | 935 | 472 | 746 | 935 | 472 | ... | ... | ... |
| 1945 | 1,159 | 1,654 | 770 | 1,159 | 1,654 | 770 | ... | ... | ... |
| 1950 | 1,926 | 2,532 | 1,124 | 1,926 | 2,532 | 1,124 | ... | ... | ... |
| 1955 | 2,438 | 3,315 | 1,351 | 2,383 | 3,348 | 1,338 | 2,397 | 2,550 | 1,552 |
| 1960 | 2,894 | 3,879 | 1,679 | 2,833 | 3,875 | 1,676 | 2,903 | 3,129 | 1,695 |
| 1965 | 3,414 | 4,685 | 1,984 | 3,319 | 4,630 | 1,979 | 3,858 | 4,242 | 1,898 |
| 1970 | 4,375 | 6,180 | 2,735 | 4,317 | 6,173 | 2,770 | 5,104 | 5,683 | 2,360 |
| 1975 | 5,803 | 8,250 | 3,730 | 5,790 | 8,315 | 3,794 | 6,700 | 7,846 | 3,113 |
| 1980 | 8,549 | 11,963 | 6,012 | 8,612 | 12,166 | 6,106 | 8,699 | 10,572 | 4,133 |
| 1985 | 11,265 | 14,959 | 8,293 | 11,638 | 15,706 | 8,525 | 9,877 | 12,301 | 5,529 |
| 1986 | 11,831 | 15,579 | 8,796 | 12,064 | 16,025 | 9,019 | 10,424 | 12,908 | 6,152 |
| 1987 | 12,327 | 16,073 | 9,261 | 12,576 | 16,559 | 9,500 | 10,886 | 13,401 | 6,573 |
| 1988 | 12,825 | 16,613 | 9,753 | 13,086 | 17,055 | 9,992 | 11,478 | 14,090 | 7,036 |
| 1989 | 13,314 | 17,014 | 10,265 | 13,762 | 17,800 | 10,577 | 11,602 | 14,538 | 7,010 |
| 1990 | 13,898 | 17,582 | 10,837 | 14,432 | 18,483 | 11,199 | 11,220 | 14,097 | 6,898 |
| 1991 | 14,278 | 17,765 | 11,369 | 14,859 | 18,730 | 11,767 | 11,125 | 13,703 | 7,186 |
| 1992 | 14,739 | 18,208 | 11,842 | 15,386 | 19,292 | 12,268 | 11,392 | 13,966 | 7,452 |
| 1993 | 15,000 | 18,430 | 12,093 | 15,665 | 19,516 | 12,546 | 11,595 | 14,128 | 7,720 |
| 1994 | 15,560 | 19,249 | 12,422 | 16,010 | 19,969 | 12,807 | 12,051 | 14,737 | 8,002 |
| 1995 | 16,108 | 19,907 | 12,897 | 16,618 | 20,672 | 13,296 | 12,198 | 14,931 | 8,301 |
| 1996 | 16,712 | 20,779 | 13,335 | 17,256 | 21,591 | 13,763 | 12,481 | 15,300 | 8,628 |
| 1997 | 17,562 | 21,814 | 14,043 | 18,127 | 22,693 | 14,482 | 12,910 | 15,911 | 8,944 |
| 1998 | 18,513 | 23,028 | 14,834 | 19,103 | 23,920 | 15,290 | 13,462 | 16,565 | 9,365 |
| 1999 | 19,265 | 23,927 | 15,465 | 19,885 | 24,839 | 15,938 | 14,051 | 17,338 | 9,784 |
| 2000 ^c | 20,226 | 25,035 | 16,289 | 20,885 | 26,001 | 16,804 | 14,489 | 17,875 | 10,136 |
| 2001 ^c | 20,907 | 25,654 | 17,038 | 21,621 | 26,639 | 17,591 | 14,539 | 18,016 | 10,323 |
| 2002 ^c | 21,153 | 25,747 | 17,423 | 21,914 | 26,797 | 18,036 | 14,053 | 17,449 | 10,370 |

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

NOTE: . . . = not applicable.

- a. Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total.
- b. Not covered before 1951.
- c. Preliminary data.
- d. For all workers, medians relate to combined earnings from wage and salary employment and self-employment. For all wage and salary workers, medians relate to wages and salaries only.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B OASDI: Covered Workers

Table 4.B4—Percentage of workers with earnings below annual maximum taxable, by sex, selected years 1937–2002

| Year | All workers ^a | | | All self-employed workers | | | Annual maximum taxable earnings (dollars) |
|------|--------------------------|------|-------|---------------------------|------|-------|---|
| | Total | Men | Women | Total | Men | Women | |
| 1937 | 96.9 | 95.8 | 99.7 | ... | ... | ... | 3,000 |
| 1940 | 96.6 | 95.4 | 99.7 | ... | ... | ... | 3,000 |
| 1945 | 86.3 | 78.6 | 98.9 | ... | ... | ... | 3,000 |
| 1950 | 71.1 | 59.9 | 94.6 | ... | ... | ... | 3,000 |
| 1951 | 75.5 | 64.6 | 96.7 | 65.4 | 62.6 | 83.3 | 3,600 |
| 1952 | 72.1 | 60.0 | 95.4 | 64.1 | 61.2 | 83.5 | 3,600 |
| 1953 | 68.8 | 55.5 | 93.8 | 62.9 | 59.5 | 83.1 | 3,600 |
| 1954 | 68.4 | 55.4 | 93.0 | 62.6 | 58.8 | 82.8 | 3,600 |
| 1955 | 74.4 | 63.4 | 95.9 | 74.0 | 72.3 | 86.3 | 4,200 |
| 1956 | 71.6 | 59.7 | 94.5 | 71.2 | 69.1 | 86.0 | 4,200 |
| 1957 | 70.1 | 58.7 | 93.1 | 69.6 | 67.2 | 85.5 | 4,200 |
| 1958 | 69.4 | 58.4 | 91.8 | 68.8 | 66.3 | 85.7 | 4,200 |
| 1959 | 73.3 | 62.7 | 94.3 | 72.0 | 69.6 | 88.0 | 4,800 |
| 1960 | 72.0 | 60.9 | 93.5 | 71.6 | 69.2 | 87.7 | 4,800 |
| 1961 | 70.8 | 59.6 | 92.4 | 70.3 | 67.8 | 86.9 | 4,800 |
| 1962 | 68.8 | 57.1 | 91.1 | 67.9 | 65.3 | 85.3 | 4,800 |
| 1963 | 67.5 | 55.5 | 90.0 | 66.3 | 63.4 | 85.3 | 4,800 |
| 1964 | 65.5 | 53.1 | 88.5 | 63.8 | 60.5 | 84.4 | 4,800 |
| 1965 | 63.9 | 51.0 | 87.3 | 59.5 | 55.8 | 82.5 | 4,800 |
| 1966 | 75.8 | 64.4 | 95.6 | 68.3 | 65.0 | 88.4 | 6,600 |
| 1967 | 73.6 | 61.5 | 94.2 | 66.7 | 63.2 | 87.5 | 6,600 |
| 1968 | 78.6 | 68.0 | 96.3 | 70.3 | 67.2 | 89.7 | 7,800 |
| 1969 | 75.5 | 62.8 | 96.0 | 68.3 | 65.0 | 89.1 | 7,800 |
| 1970 | 74.0 | 61.8 | 93.5 | 67.8 | 64.3 | 88.3 | 7,800 |
| 1971 | 71.7 | 59.1 | 91.7 | 66.7 | 63.3 | 86.2 | 7,800 |
| 1972 | 75.0 | 62.9 | 93.9 | 68.8 | 65.0 | 89.7 | 9,000 |
| 1973 | 79.7 | 68.9 | 96.2 | 71.1 | 67.4 | 91.0 | 10,800 |
| 1974 | 84.9 | 76.2 | 97.8 | 75.7 | 72.1 | 94.0 | 13,200 |
| 1975 | 84.9 | 76.4 | 97.5 | 77.8 | 74.4 | 93.9 | 14,100 |
| 1976 | 85.1 | 76.3 | 97.5 | 78.6 | 75.1 | 94.3 | 15,300 |
| 1977 | 85.2 | 76.3 | 97.5 | 79.3 | 75.8 | 94.1 | 16,500 |
| 1978 | 84.6 | 75.4 | 97.1 | 79.3 | 75.6 | 94.0 | 17,700 |
| 1979 | 90.0 | 83.6 | 98.6 | 84.3 | 81.3 | 95.9 | 22,900 |
| 1980 | 91.2 | 85.5 | 98.8 | 86.9 | 84.2 | 96.6 | 25,900 |
| 1981 | 92.4 | 87.4 | 99.0 | 89.4 | 87.1 | 97.2 | 29,700 |
| 1982 | 92.9 | 88.3 | 98.9 | 91.0 | 88.8 | 97.7 | 32,400 |
| 1983 | 93.7 | 89.6 | 99.0 | 92.0 | 90.0 | 97.7 | 35,700 |
| 1984 | 93.6 | 89.4 | 98.9 | 91.8 | 89.7 | 97.6 | 37,800 |
| 1985 | 93.5 | 89.3 | 98.8 | 92.0 | 89.8 | 97.5 | 39,600 |
| 1986 | 93.8 | 89.7 | 98.7 | 92.3 | 90.2 | 97.5 | 42,000 |
| 1987 | 93.9 | 89.9 | 98.6 | 92.5 | 90.4 | 97.5 | 43,800 |
| 1988 | 93.5 | 89.4 | 98.3 | 91.7 | 89.4 | 97.1 | 45,000 |
| 1989 | 93.8 | 90.1 | 98.3 | 92.4 | 90.1 | 97.3 | 48,000 |
| 1990 | 94.3 | 90.9 | 98.4 | 93.3 | 91.3 | 97.7 | 51,300 |
| 1991 | 94.4 | 91.1 | 98.3 | 93.6 | 91.6 | 97.7 | 53,400 |
| 1992 | 94.3 | 91.0 | 98.1 | 93.6 | 91.7 | 97.6 | 55,500 |
| 1993 | 94.4 | 91.3 | 98.1 | 93.7 | 91.9 | 97.4 | 57,600 |
| 1994 | 94.6 | 91.4 | 98.1 | 93.9 | 92.0 | 97.5 | 60,600 |

(Continued)

Table 4.B4—Percentage of workers with earnings below annual maximum taxable, by sex, selected years 1937–2002—Continued

| Year | All workers ^a | | | All self-employed workers | | | Annual maximum taxable earnings (dollars) |
|-------------------|--------------------------|------|-------|---------------------------|------|-------|---|
| | Total | Men | Women | Total | Men | Women | |
| 1995 | 94.2 | 91.0 | 97.9 | 93.9 | 92.0 | 97.5 | 61,200 |
| 1996 | 93.9 | 90.6 | 97.7 | 93.9 | 92.0 | 97.4 | 62,700 |
| 1997 | 93.8 | 90.5 | 97.6 | 93.8 | 91.9 | 97.3 | 65,400 |
| 1998 | 93.7 | 90.3 | 97.5 | 94.0 | 92.2 | 97.3 | 68,400 |
| 1999 | 93.9 | 90.7 | 97.5 | 94.2 | 92.3 | 97.4 | 72,600 |
| 2000 ^b | 93.8 | 90.6 | 97.4 | 94.2 | 92.3 | 97.4 | 76,200 |
| 2001 ^b | 94.1 | 91.0 | 97.5 | 94.5 | 92.7 | 97.5 | 80,400 |
| 2002 ^b | 94.6 | 91.8 | 97.6 | 95.0 | 93.2 | 97.7 | 84,900 |

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

NOTE: . . . = not applicable.

- a. For 1937–1950, relates to wage and salary workers. Beginning in 1951, includes self-employed workers.
 b. Preliminary data.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B OASDI: Covered Workers

Table 4.B5—Number of workers, by sex and age, selected years 1937–2002 (in thousands)

| Year | Total, all ages | Under 20 | 20–24 | 25–29 | 30–34 | 35–39 | 40–44 | 45–49 | 50–54 | 55–59 | 60–61 | 62–64 | 65–69 | 70–71 | 72 or older |
|--------------------|--------------------|-------------|--------|--------|--------|--------|--------|--------|--------|--------|-------|-------|-----------------|-------|----------------|
| <i>All workers</i> | | | | | | | | | | | | | | | |
| 1937 | 32,900 | 3,277 | 6,302 | 5,480 | 4,413 | 3,688 | 3,055 | 2,580 | 1,918 | 1,308 | 384 | 398 | ^a 97 | ... | ... |
| 1940 | 35,390 | 2,963 | 6,481 | 5,794 | 4,904 | 3,930 | 3,342 | 2,706 | 2,147 | 1,488 | 437 | 494 | 451 | 106 | 152 |
| 1945 | 46,390 | 6,313 | 5,908 | 5,571 | 5,495 | 5,288 | 4,623 | 4,061 | 3,275 | 2,577 | 831 | 926 | 975 | 214 | 333 |
| 1950 | 48,280 | 4,469 | 7,057 | 6,732 | 5,991 | 5,609 | 5,016 | 4,076 | 3,375 | 2,597 | 811 | 1,052 | 979 | 210 | 306 |
| 1955 | 65,200 | 5,410 | 7,065 | 7,499 | 7,801 | 7,458 | 7,222 | 6,507 | 5,299 | 4,261 | 1,423 | 1,893 | 2,091 | 537 | 734 |
| 1960 | 72,530 | 6,328 | 8,749 | 7,461 | 7,812 | 8,301 | 7,938 | 7,432 | 6,448 | 4,996 | 1,643 | 2,102 | 1,989 | 419 | 912 |
| 1965 | 80,680 | 8,556 | 11,066 | 8,261 | 7,488 | 8,120 | 8,550 | 7,936 | 7,163 | 5,931 | 1,943 | 2,272 | 2,027 | 424 | 943 |
| 1970 | 93,090 | 10,790 | 14,945 | 10,587 | 8,492 | 8,028 | 8,539 | 8,647 | 7,700 | 6,594 | 2,236 | 2,692 | 2,362 | 475 | 1,003 |
| 1975 | 100,200 | 11,939 | 16,419 | 13,852 | 10,304 | 8,644 | 7,997 | 8,157 | 7,896 | 6,626 | 2,289 | 2,543 | 2,139 | 444 | 951 |
| 1980 | 113,000 | 12,372 | 18,403 | 16,464 | 14,184 | 10,982 | 9,003 | 7,961 | 7,768 | 7,076 | 2,326 | 2,632 | 2,292 | 491 | 1,046 |
| 1985 | 119,800 | 10,685 | 17,727 | 18,012 | 16,193 | 14,276 | 10,961 | 8,713 | 7,435 | 6,870 | 2,410 | 2,726 | 2,206 | 489 | 1,097 |
| 1990 | 133,600 | 10,907 | 16,760 | 18,701 | 18,696 | 17,008 | 14,984 | 11,119 | 8,533 | 6,928 | 2,454 | 2,854 | 2,687 | 605 | 1,362 |
| 1995 | 141,000 | 10,832 | 15,465 | 17,078 | 18,692 | 18,760 | 16,918 | 14,622 | 10,510 | 7,667 | 2,440 | 2,777 | 2,836 | 699 | 1,704 |
| 1996 | 143,400 | 11,156 | 15,251 | 17,184 | 18,389 | 19,026 | 17,481 | 15,108 | 11,205 | 7,942 | 2,520 | 2,804 | 2,863 | 698 | 1,772 |
| 1997 | 146,145 | 11,402 | 15,486 | 17,156 | 18,033 | 19,279 | 17,964 | 15,369 | 12,023 | 8,453 | 2,569 | 2,902 | 2,913 | 731 | 1,865 |
| 1998 | 148,786 | 11,904 | 15,712 | 17,010 | 17,694 | 19,366 | 18,393 | 15,763 | 12,662 | 8,947 | 2,687 | 2,991 | 2,970 | 753 | 1,932 |
| 1999 | 151,333 | 12,241 | 16,106 | 16,754 | 17,517 | 19,407 | 18,769 | 16,318 | 13,297 | 9,332 | 2,759 | 3,087 | 3,013 | 771 | 1,962 |
| 2000 ^b | 153,691 | 12,322 | 16,595 | 16,327 | 17,600 | 19,115 | 19,069 | 16,871 | 14,064 | 9,614 | 2,856 | 3,224 | 3,139 | 824 | 2,070 |
| 2001 ^b | 153,716 | 11,636 | 16,813 | 15,914 | 17,491 | 18,570 | 19,116 | 17,251 | 14,405 | 10,166 | 2,956 | 3,297 | 3,195 | 819 | 2,086 |
| 2002 ^b | 153,837 | 10,915 | 16,878 | 15,784 | 17,162 | 17,873 | 18,999 | 17,494 | 14,642 | 10,944 | 3,247 | 3,430 | 3,319 | 863 | 2,285 |
| <i>Men</i> | | | | | | | | | | | | | | | |
| 1937 | 23,810 | 2,020 | 4,021 | 3,797 | 3,237 | 3,775 | 2,387 | 2,091 | 1,606 | 1,110 | 330 | 351 | ^a 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 | 77,498 | 5,823 | 7,943 | 9,017 | 9,697 | 10,280 | 9,498 | 7,997 | 6,376 | 4,578 | 1,423 | 1,641 | 1,650 | 433 | 1,141 |
| 1998 | 78,671 | 6,068 | 8,029 | 8,895 | 9,472 | 10,345 | 9,684 | 8,196 | 6,673 | 4,835 | 1,476 | 1,690 | 1,688 | 444 | 1,177 |
| 1999 | 80,042 | 6,251 | 8,238 | 8,774 | 9,415 | 10,376 | 9,880 | 8,480 | 6,977 | 5,028 | 1,520 | 1,734 | 1,713 | 454 | 1,200 |
| 2000 ^b | 81,090 | 6,278 | 8,486 | 8,513 | 9,428 | 10,214 | 10,030 | 8,774 | 7,316 | 5,148 | 1,576 | 1,786 | 1,793 | 484 | 1,263 |
| 2001 ^b | 81,049 | 5,883 | 8,596 | 8,328 | 9,348 | 9,940 | 10,067 | 8,995 | 7,473 | 5,417 | 1,614 | 1,828 | 1,826 | 472 | 1,262 |
| 2002 ^b | 80,962 | 5,496 | 8,618 | 8,196 | 9,173 | 9,575 | 9,993 | 9,123 | 7,585 | 5,808 | 1,759 | 1,889 | 1,893 | 485 | 1,369 |

(Continued)

Table 4.B5—Number of workers, by sex and age, selected years 1937–2002 (in thousands)—Continued

| Year | Total, all ages | Under 20 | 20–24 | 25–29 | 30–34 | 35–39 | 40–44 | 45–49 | 50–54 | 55–59 | 60–61 | 62–64 | 65–69 | 70–71 | 72 or older |
|-------------------|--------------------|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-----------------|-------|----------------|
| <i>Women</i> | | | | | | | | | | | | | | | |
| 1937 | 9,090 | 1,257 | 2,281 | 1,683 | 1,176 | 913 | 668 | 489 | 312 | 198 | 54 | 47 | ^a 12 | ... | ... |
| 1940 | 9,820 | 1,142 | 2,409 | 1,766 | 1,359 | 1,008 | 792 | 555 | 377 | 218 | 64 | 60 | 48 | 10 | 12 |
| 1945 | 17,570 | 2,970 | 3,612 | 2,517 | 1,993 | 1,802 | 1,473 | 1,221 | 866 | 593 | 167 | 161 | 137 | 25 | 33 |
| 1950 | 15,660 | 1,939 | 2,842 | 2,235 | 1,856 | 1,720 | 1,597 | 1,249 | 958 | 646 | 176 | 209 | 164 | 29 | 40 |
| 1955 | 22,060 | 2,384 | 3,085 | 2,480 | 2,456 | 2,423 | 2,376 | 2,180 | 1,704 | 1,266 | 411 | 506 | 525 | 123 | 141 |
| 1960 | 24,630 | 2,580 | 3,294 | 2,313 | 2,348 | 2,710 | 2,750 | 2,614 | 2,265 | 1,660 | 518 | 622 | 597 | 126 | 233 |
| 1965 | 28,690 | 3,350 | 4,335 | 2,687 | 2,335 | 2,704 | 3,086 | 2,934 | 2,627 | 2,128 | 669 | 753 | 668 | 144 | 270 |
| 1970 | 35,760 | 4,482 | 6,306 | 3,827 | 2,928 | 2,902 | 3,252 | 3,405 | 3,029 | 2,510 | 844 | 962 | 840 | 154 | 319 |
| 1975 | 40,680 | 5,304 | 7,297 | 5,607 | 3,864 | 3,333 | 3,166 | 3,266 | 3,167 | 2,603 | 871 | 948 | 787 | 159 | 308 |
| 1980 | 48,712 | 5,752 | 8,432 | 7,186 | 5,978 | 4,610 | 3,825 | 3,371 | 3,252 | 2,924 | 935 | 1,035 | 881 | 182 | 349 |
| 1985 | 53,686 | 5,138 | 8,295 | 8,142 | 7,127 | 6,356 | 4,911 | 3,875 | 3,249 | 2,938 | 1,002 | 1,233 | 909 | 200 | 411 |
| 1990 | 61,309 | 5,217 | 7,925 | 8,570 | 8,445 | 7,792 | 7,007 | 5,143 | 3,882 | 3,071 | 1,073 | 1,235 | 1,161 | 247 | 540 |
| 1995 | 65,557 | 5,241 | 7,396 | 7,981 | 8,546 | 8,654 | 7,951 | 6,959 | 4,891 | 3,474 | 1,066 | 1,230 | 1,222 | 295 | 651 |
| 1996 | 67,158 | 5,483 | 7,375 | 8,110 | 8,454 | 8,829 | 8,241 | 7,236 | 5,242 | 3,634 | 1,104 | 1,235 | 1,234 | 295 | 685 |
| 1997 | 68,647 | 5,579 | 7,543 | 8,139 | 8,336 | 8,998 | 8,466 | 7,372 | 5,648 | 3,875 | 1,146 | 1,261 | 1,264 | 298 | 724 |
| 1998 | 70,115 | 5,837 | 7,683 | 8,115 | 8,222 | 9,021 | 8,709 | 7,567 | 5,989 | 4,113 | 1,212 | 1,302 | 1,283 | 308 | 755 |
| 1999 | 71,291 | 5,990 | 7,868 | 7,980 | 8,102 | 9,031 | 8,889 | 7,838 | 6,321 | 4,304 | 1,239 | 1,353 | 1,299 | 317 | 762 |
| 2000 ^b | 72,600 | 6,045 | 8,109 | 7,814 | 8,172 | 8,901 | 9,039 | 8,097 | 6,748 | 4,466 | 1,280 | 1,439 | 1,346 | 340 | 807 |
| 2001 ^b | 72,667 | 5,752 | 8,216 | 7,586 | 8,144 | 8,631 | 9,049 | 8,255 | 6,932 | 4,748 | 1,343 | 1,469 | 1,369 | 347 | 825 |
| 2002 ^b | 72,872 | 5,419 | 8,259 | 7,588 | 7,989 | 8,298 | 9,006 | 8,371 | 7,056 | 5,136 | 1,488 | 1,542 | 1,426 | 378 | 916 |

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

NOTES: Age refers to age attained during year.

... = not applicable.

a. Represents workers attaining age 65 during the year. Workers aged 65 or older were not covered under the program in that year.

b. Preliminary data.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B OASDI: Covered Workers

Table 4.B6—Median earnings of workers, by sex and age, selected years 1937–2002 (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 |
|--------------------|--------------------|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|------------------|-------|----------------|
| All workers | | | | | | | | | | | | | | | |
| 1937 | 761 | 170 | 570 | 829 | 998 | 1,061 | 1,126 | 1,121 | 1,177 | 1,020 | 1,010 | 927 | ^a 512 | ... | ... |
| 1940 | 746 | 140 | 498 | 764 | 934 | 1,041 | 1,064 | 1,110 | 1,071 | 1,018 | 978 | 963 | 874 | 924 | 788 |
| 1945 | 1,159 | 288 | 669 | 818 | 1,383 | 1,617 | 1,842 | 2,026 | 1,874 | 1,821 | 1,782 | 1,739 | 1,482 | 1,341 | 1,307 |
| 1950 | 1,926 | 385 | 1,376 | 1,971 | 2,312 | 2,456 | 2,473 | 2,517 | 2,442 | 2,394 | 2,492 | 2,252 | 1,973 | 1,916 | 1,589 |
| 1955 | 2,438 | 443 | 1,601 | 2,689 | 3,173 | 3,233 | 3,196 | 3,068 | 2,966 | 2,728 | 2,525 | 2,427 | 1,736 | 1,279 | 1,149 |
| 1960 | 2,894 | 561 | 1,917 | 3,138 | 3,738 | 3,903 | 3,891 | 3,785 | 3,643 | 3,452 | 3,166 | 3,052 | 1,590 | 1,140 | 1,252 |
| 1965 | 3,414 | 613 | 2,326 | 3,919 | 4,540 | 4,747 | 4,756 | 4,665 | 4,526 | 4,304 | 4,087 | 3,767 | 1,791 | 1,171 | 1,326 |
| 1970 | 4,375 | 810 | 2,988 | 5,334 | 6,156 | 6,339 | 6,357 | 6,292 | 6,105 | 5,831 | 5,473 | 5,047 | 2,099 | 1,578 | 1,683 |
| 1975 | 5,803 | 1,070 | 4,187 | 6,795 | 8,249 | 8,629 | 8,725 | 8,810 | 8,748 | 8,299 | 7,779 | 6,620 | 2,524 | 2,105 | 2,137 |
| 1980 | 8,549 | 1,646 | 6,205 | 9,593 | 11,510 | 12,540 | 12,690 | 12,784 | 12,794 | 12,309 | 11,606 | 9,651 | 4,451 | 3,306 | 3,140 |
| 1985 | 11,265 | 1,647 | 7,136 | 12,453 | 14,886 | 16,458 | 16,984 | 16,849 | 16,528 | 15,831 | 14,724 | 11,907 | 5,974 | 4,330 | 3,729 |
| 1990 | 13,898 | 1,937 | 8,054 | 14,687 | 17,482 | 19,296 | 20,664 | 20,958 | 20,157 | 18,584 | 17,163 | 13,021 | 6,812 | 5,375 | 4,536 |
| 1995 | 16,108 | 2,076 | 8,392 | 16,134 | 19,654 | 21,629 | 23,468 | 24,690 | 24,090 | 21,320 | 19,136 | 12,961 | 7,551 | 5,816 | 4,681 |
| 1996 | 16,712 | 2,140 | 8,562 | 16,664 | 20,327 | 22,311 | 24,116 | 25,317 | 25,176 | 22,083 | 19,718 | 13,408 | 7,692 | 6,217 | 4,861 |
| 1997 | 17,562 | 2,310 | 9,074 | 17,596 | 21,261 | 23,279 | 24,979 | 26,264 | 26,415 | 23,398 | 20,514 | 14,284 | 8,056 | 6,387 | 5,033 |
| 1998 | 18,513 | 2,515 | 9,763 | 18,666 | 22,453 | 24,345 | 25,971 | 27,390 | 27,609 | 24,688 | 21,372 | 15,229 | 8,431 | 6,747 | 5,302 |
| 1999 | 19,265 | 2,610 | 10,163 | 19,563 | 23,469 | 25,173 | 26,788 | 28,315 | 28,643 | 25,577 | 22,151 | 15,902 | 8,935 | 6,780 | 5,271 |
| 2000 ^b | 20,226 | 2,713 | 10,707 | 20,595 | 24,812 | 26,383 | 27,828 | 29,407 | 29,536 | 26,723 | 22,873 | 16,543 | 9,456 | 7,304 | 5,380 |
| 2001 ^b | 20,907 | 2,715 | 10,681 | 20,969 | 25,615 | 27,235 | 28,551 | 30,145 | 30,438 | 27,732 | 23,692 | 17,778 | 10,558 | 7,861 | 5,757 |
| 2002 ^b | 21,153 | 2,654 | 10,269 | 20,895 | 25,870 | 27,733 | 29,008 | 30,358 | 31,019 | 28,403 | 24,482 | 18,591 | 11,119 | 8,162 | 5,895 |
| Men | | | | | | | | | | | | | | | |
| 1937 | 945 | 174 | 647 | 1,117 | 1,202 | 1,286 | 1,338 | 1,308 | 1,232 | 1,137 | 1,131 | 1,008 | ^a 563 | ... | ... |
| 1940 | 935 | 147 | 550 | 928 | 1,143 | 1,289 | 1,306 | 1,320 | 1,238 | 1,153 | 1,088 | 1,058 | 950 | 917 | 899 |
| 1945 | 1,654 | 271 | 422 | 813 | 1,983 | 2,245 | 2,405 | 2,364 | 2,319 | 2,170 | 2,106 | 2,000 | 1,666 | 1,462 | 1,390 |
| 1950 | 2,532 | 402 | 1,566 | 2,465 | 2,918 | 3,102 | 3,131 | 3,156 | 3,018 | 2,959 | 2,812 | 2,618 | 2,317 | 2,049 | 1,707 |
| 1955 | 3,315 | 468 | 1,871 | 3,450 | 4,079 | 4,201 | 4,159 | 4,005 | 3,818 | 3,512 | 3,201 | 3,044 | 2,164 | 1,498 | 1,292 |
| 1960 | 3,879 | 615 | 2,116 | 3,942 | 4,831 | 5,175 | 5,167 | 4,954 | 4,702 | 4,416 | 3,982 | 3,812 | 2,112 | 1,207 | 1,340 |
| 1965 | 4,685 | 710 | 2,609 | 4,957 | 6,055 | 6,481 | 6,519 | 6,369 | 5,921 | 5,581 | 4,993 | 4,784 | 2,628 | 1,246 | 1,443 |
| 1970 | 6,180 | 930 | 3,281 | 6,827 | 8,131 | 8,528 | 8,686 | 8,735 | 8,370 | 7,675 | 7,051 | 6,456 | 2,927 | 1,662 | 1,863 |
| 1975 | 8,250 | 1,246 | 4,870 | 8,464 | 11,170 | 12,131 | 12,533 | 12,605 | 12,270 | 11,290 | 10,398 | 8,700 | 2,895 | 2,276 | 2,371 |
| 1980 | 11,963 | 1,857 | 7,007 | 11,880 | 15,491 | 17,982 | 18,720 | 18,896 | 18,391 | 17,585 | 15,939 | 13,201 | 4,902 | 3,658 | 3,529 |
| 1985 | 14,959 | 1,771 | 8,185 | 14,465 | 18,642 | 22,021 | 24,433 | 24,385 | 23,841 | 22,117 | 19,953 | 16,532 | 6,760 | 4,977 | 4,351 |
| 1990 | 17,582 | 2,058 | 8,945 | 16,412 | 21,211 | 24,424 | 27,608 | 29,074 | 28,027 | 25,509 | 23,243 | 17,408 | 7,714 | 6,153 | 5,129 |
| 1995 | 19,907 | 2,164 | 9,618 | 17,810 | 23,200 | 26,912 | 29,732 | 32,334 | 32,505 | 28,260 | 24,673 | 17,090 | 8,133 | 6,430 | 4,977 |
| 1996 | 20,779 | 2,234 | 9,900 | 18,538 | 24,024 | 27,769 | 30,658 | 32,850 | 33,648 | 29,426 | 25,177 | 17,632 | 8,441 | 6,715 | 5,295 |
| 1997 | 21,814 | 2,379 | 10,356 | 19,748 | 25,231 | 28,874 | 31,790 | 33,738 | 34,890 | 31,018 | 26,229 | 18,159 | 8,832 | 7,097 | 5,300 |
| 1998 | 23,028 | 2,600 | 11,135 | 21,040 | 26,645 | 30,154 | 32,996 | 34,823 | 36,125 | 32,577 | 27,588 | 19,750 | 9,286 | 7,429 | 5,638 |
| 1999 | 23,927 | 2,718 | 11,616 | 22,200 | 27,805 | 31,113 | 33,946 | 35,717 | 36,924 | 33,428 | 28,382 | 20,172 | 9,873 | 7,323 | 5,594 |
| 2000 ^b | 25,035 | 2,801 | 12,175 | 23,395 | 29,400 | 32,358 | 35,230 | 36,945 | 37,917 | 34,762 | 28,840 | 21,128 | 10,478 | 7,911 | 5,795 |
| 2001 ^b | 25,654 | 2,784 | 11,982 | 23,487 | 30,149 | 33,145 | 35,817 | 37,468 | 38,400 | 35,365 | 29,914 | 22,034 | 12,010 | 8,571 | 6,250 |
| 2002 ^b | 25,747 | 2,724 | 11,451 | 23,185 | 30,447 | 33,714 | 36,065 | 37,696 | 38,373 | 35,927 | 30,744 | 22,924 | 12,535 | 8,779 | 6,410 |

(Continued)

Table 4.B6—Median earnings of workers, by sex and age, selected years 1937–2002 (in dollars)—Continued

| Year | Total, all ages | Under 20 | 20–24 | 25–29 | 30–34 | 35–39 | 40–44 | 45–49 | 50–54 | 55–59 | 60–61 | 62–64 | 65–69 | 70–71 | 72 or older |
|-------------------|--------------------|-------------|-------|--------|--------|--------|--------|--------|--------|--------|--------|--------|------------------|-------|----------------|
| <i>Women</i> | | | | | | | | | | | | | | | |
| 1937 | 484 | 163 | 477 | 602 | 621 | 609 | 604 | 589 | 576 | 563 | 585 | 582 | ^a 366 | ... | ... |
| 1940 | 472 | 127 | 432 | 530 | 590 | 599 | 596 | 590 | 580 | 562 | 499 | 577 | 607 | 999 | 424 |
| 1945 | 770 | 307 | 811 | 821 | 871 | 971 | 1,026 | 1,018 | 987 | 955 | 946 | 899 | 832 | 766 | 928 |
| 1950 | 1,124 | 362 | 1,153 | 1,158 | 1,196 | 1,297 | 1,421 | 1,456 | 1,410 | 1,416 | 1,370 | 1,349 | 1,176 | 1,399 | 1,232 |
| 1955 | 1,351 | 408 | 1,312 | 1,406 | 1,430 | 1,586 | 1,706 | 1,775 | 1,768 | 1,622 | 1,542 | 1,445 | 1,057 | 949 | 802 |
| 1960 | 1,679 | 484 | 1,558 | 1,969 | 1,718 | 1,899 | 2,075 | 2,205 | 2,290 | 2,221 | 2,040 | 1,783 | 1,142 | 1,007 | 1,036 |
| 1965 | 1,984 | 539 | 1,852 | 2,067 | 2,069 | 2,243 | 2,478 | 2,660 | 2,715 | 2,764 | 2,678 | 2,372 | 1,208 | 1,054 | 1,093 |
| 1970 | 2,735 | 675 | 2,538 | 3,151 | 2,953 | 3,210 | 3,498 | 3,721 | 3,790 | 3,747 | 3,729 | 3,236 | 1,674 | 1,344 | 1,375 |
| 1975 | 3,730 | 905 | 3,287 | 4,800 | 4,454 | 4,512 | 4,870 | 5,168 | 5,340 | 5,300 | 5,020 | 4,055 | 2,189 | 1,895 | 1,715 |
| 1980 | 6,012 | 1,451 | 5,083 | 7,496 | 7,649 | 7,495 | 7,761 | 7,893 | 8,079 | 7,966 | 7,756 | 6,044 | 3,589 | 2,853 | 2,569 |
| 1985 | 8,293 | 1,524 | 6,063 | 10,251 | 10,986 | 11,169 | 11,163 | 11,072 | 10,898 | 10,714 | 10,133 | 7,728 | 4,959 | 3,671 | 3,067 |
| 1990 | 10,837 | 1,816 | 7,104 | 12,677 | 13,642 | 14,339 | 15,031 | 14,920 | 14,373 | 13,088 | 12,194 | 9,133 | 5,888 | 4,387 | 3,830 |
| 1995 | 12,897 | 1,991 | 7,232 | 14,249 | 15,853 | 16,547 | 18,068 | 18,732 | 17,937 | 16,030 | 14,147 | 9,882 | 6,910 | 5,120 | 4,376 |
| 1996 | 13,335 | 2,051 | 7,383 | 14,637 | 16,387 | 17,009 | 18,532 | 19,496 | 18,834 | 16,728 | 14,670 | 10,358 | 6,971 | 5,605 | 4,372 |
| 1997 | 14,043 | 2,243 | 7,873 | 15,238 | 17,150 | 17,801 | 19,277 | 20,325 | 19,989 | 17,750 | 15,762 | 11,003 | 7,331 | 5,638 | 4,687 |
| 1998 | 14,834 | 2,435 | 8,529 | 16,128 | 18,133 | 18,625 | 20,046 | 21,484 | 21,088 | 18,656 | 16,606 | 11,646 | 7,619 | 5,968 | 4,871 |
| 1999 | 15,465 | 2,519 | 8,928 | 16,897 | 18,823 | 19,283 | 20,688 | 22,265 | 22,129 | 19,594 | 17,168 | 12,324 | 8,032 | 6,245 | 4,876 |
| 2000 ^b | 16,289 | 2,635 | 9,445 | 17,777 | 19,896 | 20,381 | 21,549 | 23,205 | 23,083 | 20,681 | 17,977 | 12,900 | 8,464 | 6,466 | 4,954 |
| 2001 ^b | 17,038 | 2,647 | 9,516 | 18,329 | 20,750 | 21,112 | 22,234 | 24,042 | 24,166 | 21,840 | 18,707 | 14,094 | 9,219 | 7,105 | 5,215 |
| 2002 ^b | 17,423 | 2,591 | 9,257 | 18,478 | 21,163 | 21,669 | 22,775 | 24,392 | 25,089 | 22,851 | 19,577 | 15,070 | 9,760 | 7,551 | 5,332 |

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

NOTES: The amount of median earnings includes estimates above the taxable maximum.

Age refers to age attained during year.

... = not applicable.

a. Earnings of workers attaining age 65 during the year. Workers aged 65 or older not covered under program in that year.

b. Preliminary data.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B OASDI: Covered Workers

Table 4.B7—Number of wage and salary workers, by sex and amount of taxable earnings, 1992–2002 (in thousands)

| Year | Total | Workers with earnings below the taxable maximum (by dollar amount of earnings) | | | | | | | | | | | Workers with maximum earnings |
|------------------------------------|---------|--|-------------|-------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-------------------------------|
| | | 1–999 | 1,000–4,999 | 5,000–9,999 | 10,000–19,999 | 20,000–29,999 | 30,000–39,999 | 40,000–49,999 | 50,000–59,999 | 60,000–69,999 | 70,000–79,999 | 80,000–84,899 | |
| <i>All wage and salary workers</i> | | | | | | | | | | | | | |
| 1992 | 126,000 | 9,357 | 19,519 | 17,496 | 29,812 | 20,699 | 12,554 | 7,084 | 2,422 | ... | ... | ... | 7,057 |
| 1993 | 128,100 | 9,655 | 19,395 | 17,521 | 29,900 | 21,134 | 12,786 | 7,371 | 3,325 | ... | ... | ... | 7,013 |
| 1994 | 130,100 | 9,591 | 19,403 | 17,273 | 29,903 | 21,482 | 13,230 | 7,709 | 4,310 | 277 | ... | ... | 6,921 |
| 1995 | 132,800 | 9,213 | 19,355 | 17,213 | 30,142 | 22,097 | 13,853 | 8,171 | 4,662 | 498 | ... | ... | 7,597 |
| 1996 | 135,100 | 9,161 | 19,195 | 16,977 | 29,832 | 22,612 | 14,435 | 8,706 | 5,052 | 1,053 | ... | ... | 8,077 |
| 1997 | 137,765 | 8,743 | 18,811 | 16,853 | 29,676 | 23,076 | 15,243 | 9,330 | 5,523 | 2,106 | ... | ... | 8,405 |
| 1998 | 140,386 | 8,427 | 18,402 | 16,431 | 29,360 | 23,586 | 16,095 | 10,062 | 6,008 | 3,268 | ... | ... | 8,747 |
| 1999 | 142,703 | 8,260 | 18,162 | 16,261 | 28,975 | 23,861 | 16,763 | 10,546 | 6,456 | 3,974 | 856 | ... | 8,589 |
| 2000 ^a | 145,046 | 8,207 | 17,864 | 15,866 | 28,213 | 24,118 | 17,258 | 11,249 | 7,009 | 4,409 | 1,981 | ... | 8,873 |
| 2001 ^a | 144,921 | 8,072 | 17,406 | 15,418 | 27,385 | 23,681 | 17,443 | 11,642 | 7,383 | 4,675 | 3,121 | 173 | 8,521 |
| 2002 ^a | 144,897 | 8,262 | 17,415 | 15,298 | 26,604 | 23,244 | 17,440 | 11,755 | 7,598 | 4,922 | 3,308 | 1,257 | 7,795 |
| <i>Men</i> | | | | | | | | | | | | | |
| 1992 | 66,543 | 4,171 | 8,743 | 7,726 | 13,773 | 11,128 | 8,069 | 5,109 | 1,868 | ... | ... | ... | 5,955 |
| 1993 | 67,673 | 4,429 | 8,665 | 7,740 | 13,875 | 11,270 | 8,074 | 5,224 | 2,527 | ... | ... | ... | 5,869 |
| 1994 | 68,481 | 4,350 | 8,548 | 7,546 | 13,836 | 11,360 | 8,211 | 5,372 | 3,243 | 222 | ... | ... | 5,794 |
| 1995 | 69,901 | 4,256 | 8,510 | 7,457 | 13,865 | 11,653 | 8,448 | 5,587 | 3,444 | 388 | ... | ... | 6,292 |
| 1996 | 70,670 | 4,177 | 8,333 | 7,261 | 13,491 | 11,791 | 8,667 | 5,838 | 3,672 | 800 | ... | ... | 6,641 |
| 1997 | 71,910 | 4,040 | 8,158 | 7,154 | 13,199 | 11,864 | 8,957 | 6,162 | 3,932 | 1,582 | ... | ... | 6,862 |
| 1998 | 73,111 | 3,900 | 7,964 | 6,936 | 12,868 | 11,947 | 9,297 | 6,520 | 4,199 | 2,406 | ... | ... | 7,074 |
| 1999 | 74,376 | 3,848 | 7,894 | 6,892 | 12,595 | 11,942 | 9,565 | 6,711 | 4,456 | 2,895 | 642 | ... | 6,936 |
| 2000 ^a | 75,477 | 3,842 | 7,776 | 6,732 | 12,139 | 11,860 | 9,678 | 7,018 | 4,701 | 3,149 | 1,465 | ... | 7,115 |
| 2001 ^a | 75,412 | 3,822 | 7,687 | 6,622 | 11,823 | 11,475 | 9,635 | 7,085 | 4,854 | 3,229 | 2,261 | 133 | 6,787 |
| 2002 ^a | 75,221 | 3,987 | 7,749 | 6,652 | 11,548 | 11,117 | 9,501 | 7,003 | 4,883 | 3,320 | 2,356 | 931 | 6,175 |
| <i>Women</i> | | | | | | | | | | | | | |
| 1992 | 59,457 | 5,186 | 10,776 | 9,770 | 16,039 | 9,571 | 4,485 | 1,975 | ... | ... | ... | ... | 1,103 |
| 1993 | 60,427 | 5,226 | 10,730 | 9,781 | 16,026 | 9,864 | 4,712 | 2,147 | ... | ... | ... | ... | 1,144 |
| 1994 | 61,619 | 5,241 | 10,856 | 9,726 | 16,068 | 10,122 | 5,020 | 2,337 | 1,067 | 55 | ... | ... | 1,127 |
| 1995 | 62,900 | 4,957 | 10,845 | 9,756 | 16,277 | 10,444 | 5,405 | 2,584 | 1,217 | 110 | ... | ... | 1,305 |
| 1996 | 64,429 | 4,985 | 10,862 | 9,716 | 16,341 | 10,819 | 5,768 | 2,868 | 1,380 | 253 | ... | ... | 1,437 |
| 1997 | 65,855 | 4,703 | 10,653 | 9,698 | 16,477 | 11,212 | 6,285 | 3,169 | 1,591 | 524 | ... | ... | 1,543 |
| 1998 | 67,275 | 4,527 | 10,438 | 9,495 | 16,492 | 11,640 | 6,798 | 3,541 | 1,808 | 862 | ... | ... | 1,673 |
| 1999 | 68,327 | 4,411 | 10,267 | 9,369 | 16,380 | 11,919 | 7,199 | 3,835 | 2,000 | 1,079 | 214 | ... | 1,652 |
| 2000 ^a | 69,569 | 4,364 | 10,088 | 9,134 | 16,074 | 12,258 | 7,580 | 4,231 | 2,307 | 1,259 | 516 | ... | 1,757 |
| 2001 ^a | 69,509 | 4,250 | 9,720 | 8,796 | 15,563 | 12,206 | 7,808 | 4,557 | 2,529 | 1,446 | 860 | 40 | 1,735 |
| 2002 ^a | 69,676 | 4,275 | 9,666 | 8,647 | 15,056 | 12,127 | 7,938 | 4,752 | 2,715 | 1,602 | 952 | 326 | 1,620 |

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

NOTE: ... = not applicable.

a. Preliminary data.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

**Table 4.B8—Number of self-employed workers, by sex and age, selected years 1951–2002
(in thousands)**

| Year | Total, all ages | Under 20 | 20–24 | 25–29 | 30–34 | 35–39 | 40–44 | 45–49 | 50–54 | 55–59 | 60–61 | 62–64 | 65–69 | 70–71 | 72 or older |
|----------------------------------|--------------------|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|----------------|
| <i>All self-employed workers</i> | | | | | | | | | | | | | | | |
| 1951 | 4,190 | 6 | 71 | 246 | 414 | 543 | 592 | 565 | 503 | 462 | 164 | 215 | 237 | 55 | 117 |
| 1955 | 6,810 | 18 | 114 | 362 | 600 | 757 | 865 | 874 | 790 | 737 | 290 | 441 | 497 | 143 | 322 |
| 1960 | 6,870 | 19 | 133 | 305 | 560 | 743 | 848 | 929 | 918 | 846 | 316 | 452 | 414 | 101 | 286 |
| 1965 | 6,550 | 31 | 143 | 292 | 452 | 664 | 814 | 870 | 913 | 885 | 328 | 411 | 388 | 92 | 267 |
| 1970 | 6,270 | 33 | 159 | 348 | 476 | 581 | 729 | 808 | 837 | 839 | 327 | 407 | 388 | 94 | 244 |
| 1975 | 7,000 | 67 | 302 | 581 | 679 | 700 | 731 | 813 | 869 | 823 | 317 | 382 | 393 | 95 | 248 |
| 1980 | 8,200 | 78 | 380 | 824 | 1,052 | 983 | 869 | 812 | 851 | 852 | 307 | 381 | 419 | 112 | 280 |
| 1985 | 10,600 | 112 | 527 | 1,099 | 1,488 | 1,522 | 1,261 | 1,030 | 930 | 929 | 368 | 434 | 455 | 124 | 321 |
| 1990 | 12,500 | 152 | 529 | 1,123 | 1,663 | 1,854 | 1,736 | 1,377 | 1,113 | 980 | 381 | 487 | 567 | 150 | 389 |
| 1991 | 12,800 | 136 | 521 | 1,105 | 1,697 | 1,897 | 1,818 | 1,474 | 1,170 | 998 | 388 | 486 | 561 | 158 | 391 |
| 1992 | 13,100 | 137 | 509 | 1,093 | 1,678 | 1,951 | 1,864 | 1,589 | 1,243 | 1,018 | 382 | 484 | 576 | 166 | 410 |
| 1993 | 13,200 | 131 | 488 | 1,029 | 1,650 | 1,956 | 1,892 | 1,647 | 1,325 | 1,047 | 375 | 481 | 589 | 164 | 426 |
| 1994 | 13,300 | 140 | 473 | 989 | 1,624 | 1,936 | 1,945 | 1,726 | 1,357 | 1,070 | 375 | 482 | 580 | 164 | 437 |
| 1995 | 13,500 | 143 | 482 | 1,005 | 1,612 | 1,960 | 1,964 | 1,808 | 1,393 | 1,097 | 385 | 467 | 574 | 166 | 445 |
| 1996 | 13,900 | 147 | 490 | 1,036 | 1,614 | 2,013 | 2,035 | 1,873 | 1,471 | 1,144 | 404 | 475 | 575 | 164 | 458 |
| 1997 | 14,020 | 151 | 498 | 1,030 | 1,548 | 1,978 | 2,053 | 1,874 | 1,555 | 1,203 | 402 | 485 | 592 | 169 | 483 |
| 1998 | 14,230 | 162 | 510 | 1,045 | 1,524 | 1,963 | 2,092 | 1,885 | 1,616 | 1,265 | 415 | 493 | 590 | 178 | 492 |
| 1999 | 14,500 | 171 | 535 | 1,040 | 1,521 | 1,965 | 2,088 | 1,969 | 1,684 | 1,322 | 420 | 514 | 595 | 174 | 502 |
| 2000 ^a | 14,725 | 177 | 565 | 1,031 | 1,502 | 1,945 | 2,084 | 2,008 | 1,786 | 1,345 | 445 | 527 | 600 | 184 | 526 |
| 2001 ^a | 14,875 | 177 | 596 | 1,031 | 1,508 | 1,884 | 2,087 | 2,030 | 1,814 | 1,422 | 458 | 533 | 621 | 181 | 533 |
| 2002 ^a | 15,150 | 179 | 622 | 1,048 | 1,534 | 1,832 | 2,094 | 2,057 | 1,839 | 1,523 | 500 | 560 | 638 | 174 | 551 |
| <i>Men</i> | | | | | | | | | | | | | | | |
| 1951 | 3,620 | 5 | 61 | 219 | 370 | 478 | 519 | 479 | 430 | 393 | 139 | 179 | 204 | 47 | 97 |
| 1955 | 5,980 | 16 | 104 | 335 | 555 | 687 | 773 | 773 | 679 | 631 | 247 | 373 | 420 | 122 | 265 |
| 1960 | 5,990 | 16 | 119 | 284 | 515 | 678 | 757 | 812 | 793 | 709 | 260 | 386 | 348 | 83 | 230 |
| 1965 | 5,640 | 26 | 127 | 263 | 410 | 598 | 714 | 759 | 772 | 742 | 272 | 339 | 326 | 75 | 217 |
| 1970 | 5,370 | 28 | 136 | 306 | 422 | 522 | 642 | 699 | 712 | 695 | 268 | 324 | 320 | 77 | 201 |
| 1975 | 5,790 | 57 | 251 | 479 | 564 | 584 | 619 | 680 | 715 | 672 | 255 | 309 | 326 | 78 | 201 |
| 1980 | 6,407 | 60 | 305 | 639 | 793 | 752 | 672 | 641 | 681 | 668 | 244 | 301 | 333 | 92 | 226 |
| 1985 | 7,623 | 79 | 378 | 782 | 1,060 | 1,058 | 873 | 730 | 674 | 686 | 278 | 328 | 351 | 97 | 249 |
| 1990 | 8,525 | 103 | 346 | 746 | 1,112 | 1,241 | 1,148 | 914 | 762 | 693 | 270 | 355 | 424 | 116 | 295 |
| 1991 | 8,668 | 92 | 341 | 726 | 1,109 | 1,268 | 1,204 | 976 | 793 | 699 | 273 | 350 | 418 | 119 | 299 |
| 1992 | 8,798 | 89 | 330 | 714 | 1,090 | 1,289 | 1,228 | 1,041 | 830 | 706 | 271 | 344 | 427 | 126 | 312 |
| 1993 | 8,840 | 89 | 310 | 674 | 1,075 | 1,290 | 1,241 | 1,078 | 885 | 713 | 261 | 341 | 436 | 125 | 322 |
| 1994 | 8,839 | 89 | 309 | 638 | 1,053 | 1,269 | 1,268 | 1,127 | 890 | 723 | 263 | 333 | 423 | 122 | 331 |
| 1995 | 8,908 | 97 | 305 | 648 | 1,030 | 1,271 | 1,281 | 1,170 | 906 | 735 | 269 | 325 | 413 | 124 | 335 |
| 1996 | 9,074 | 94 | 306 | 658 | 1,021 | 1,281 | 1,322 | 1,200 | 954 | 754 | 276 | 328 | 415 | 119 | 346 |
| 1997 | 9,078 | 98 | 311 | 638 | 975 | 1,245 | 1,313 | 1,197 | 997 | 788 | 275 | 334 | 420 | 122 | 365 |
| 1998 | 9,109 | 98 | 314 | 641 | 947 | 1,217 | 1,326 | 1,188 | 1,033 | 819 | 275 | 338 | 415 | 130 | 368 |
| 1999 | 9,225 | 107 | 319 | 632 | 948 | 1,207 | 1,314 | 1,240 | 1,063 | 844 | 279 | 352 | 415 | 127 | 377 |
| 2000 ^a | 9,250 | 108 | 334 | 611 | 912 | 1,183 | 1,289 | 1,255 | 1,122 | 850 | 293 | 350 | 420 | 133 | 391 |
| 2001 ^a | 9,232 | 104 | 341 | 605 | 890 | 1,133 | 1,286 | 1,260 | 1,128 | 885 | 297 | 352 | 431 | 131 | 389 |
| 2002 ^a | 9,275 | 107 | 350 | 585 | 883 | 1,092 | 1,256 | 1,274 | 1,135 | 941 | 319 | 364 | 441 | 125 | 404 |

(Continued)

4.B OASDI: Covered Workers

**Table 4.B8—Number of self-employed workers, by sex and age, selected years 1951–2002
(in thousands)—Continued**

| Year | Total, all ages | Under 20 | 20–24 | 25–29 | 30–34 | 35–39 | 40–44 | 45–49 | 50–54 | 55–59 | 60–61 | 62–64 | 65–69 | 70–71 | 72 or older |
|-------------------|--------------------|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|----------------|
| <i>Women</i> | | | | | | | | | | | | | | | |
| 1951 | 570 | 1 | 10 | 27 | 44 | 65 | 73 | 86 | 73 | 69 | 25 | 36 | 33 | 8 | 20 |
| 1955 | 830 | 2 | 10 | 27 | 45 | 70 | 92 | 101 | 111 | 106 | 43 | 68 | 77 | 21 | 57 |
| 1960 | 880 | 3 | 14 | 21 | 45 | 65 | 91 | 117 | 125 | 137 | 56 | 66 | 67 | 18 | 55 |
| 1965 | 910 | 5 | 16 | 29 | 42 | 66 | 100 | 111 | 141 | 143 | 56 | 72 | 62 | 17 | 50 |
| 1970 | 900 | 5 | 23 | 42 | 54 | 59 | 87 | 109 | 125 | 144 | 59 | 65 | 68 | 17 | 43 |
| 1975 | 1,210 | 10 | 51 | 102 | 115 | 116 | 112 | 133 | 154 | 151 | 62 | 73 | 67 | 17 | 47 |
| 1980 | 1,793 | 18 | 75 | 185 | 259 | 231 | 197 | 171 | 170 | 184 | 63 | 80 | 86 | 20 | 54 |
| 1985 | 2,977 | 33 | 149 | 317 | 428 | 464 | 388 | 300 | 256 | 243 | 90 | 106 | 104 | 27 | 72 |
| 1990 | 3,975 | 49 | 183 | 377 | 551 | 613 | 588 | 463 | 350 | 287 | 111 | 132 | 142 | 34 | 94 |
| 1991 | 4,131 | 44 | 180 | 378 | 588 | 629 | 614 | 499 | 376 | 299 | 115 | 136 | 143 | 39 | 92 |
| 1992 | 4,302 | 48 | 179 | 380 | 588 | 662 | 636 | 548 | 413 | 312 | 110 | 140 | 148 | 39 | 98 |
| 1993 | 4,360 | 41 | 178 | 355 | 575 | 666 | 651 | 569 | 440 | 334 | 114 | 140 | 153 | 39 | 104 |
| 1994 | 4,460 | 51 | 164 | 352 | 572 | 667 | 677 | 599 | 468 | 346 | 112 | 148 | 157 | 42 | 105 |
| 1995 | 4,592 | 46 | 177 | 357 | 582 | 689 | 683 | 638 | 487 | 362 | 116 | 142 | 161 | 42 | 109 |
| 1996 | 4,826 | 54 | 183 | 377 | 594 | 733 | 713 | 673 | 517 | 390 | 128 | 147 | 160 | 45 | 112 |
| 1997 | 4,942 | 54 | 188 | 392 | 572 | 733 | 739 | 676 | 558 | 415 | 128 | 151 | 172 | 47 | 118 |
| 1998 | 5,121 | 65 | 196 | 404 | 577 | 746 | 767 | 697 | 583 | 445 | 140 | 155 | 175 | 48 | 124 |
| 1999 | 5,276 | 64 | 216 | 408 | 573 | 757 | 773 | 729 | 621 | 478 | 141 | 162 | 180 | 47 | 126 |
| 2000 ^a | 5,475 | 69 | 231 | 421 | 590 | 762 | 795 | 754 | 664 | 495 | 152 | 176 | 180 | 51 | 135 |
| 2001 ^a | 5,643 | 73 | 255 | 426 | 618 | 751 | 801 | 769 | 686 | 537 | 161 | 181 | 190 | 50 | 144 |
| 2002 ^a | 5,874 | 72 | 273 | 463 | 651 | 739 | 838 | 783 | 704 | 582 | 181 | 196 | 197 | 49 | 147 |

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

NOTE: Age refers to age attained during year.

a. Preliminary data.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

Table 4.B9—Number of self-employed workers, by sex and amount of taxable earnings, 1992–2002 (in thousands)

| Year | Total | Workers with earnings below taxable maximum (by dollar amount of earnings) | | | | | | | | | | | Workers with maximum earnings |
|----------------------------------|--------|--|-------------|-------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-------------------------------|
| | | 1–999 | 1,000–4,999 | 5,000–9,999 | 10,000–19,999 | 20,000–29,999 | 30,000–39,999 | 40,000–49,999 | 50,000–59,999 | 60,000–69,999 | 70,000–79,999 | 80,000–84,899 | |
| All self-employed workers | | | | | | | | | | | | | |
| 1992 | 13,100 | 593 | 2,927 | 2,519 | 2,755 | 1,576 | 971 | 612 | 308 | ... | ... | ... | 839 |
| 1993 | 13,200 | 587 | 2,866 | 2,562 | 2,776 | 1,570 | 990 | 633 | 388 | ... | ... | ... | 828 |
| 1994 | 13,300 | 551 | 2,825 | 2,510 | 2,832 | 1,586 | 1,019 | 645 | 426 | 92 | ... | ... | 814 |
| 1995 | 13,500 | 535 | 2,781 | 2,593 | 2,882 | 1,604 | 1,044 | 678 | 444 | 116 | ... | ... | 822 |
| 1996 | 13,900 | 521 | 2,791 | 2,667 | 2,964 | 1,650 | 1,092 | 713 | 471 | 176 | ... | ... | 853 |
| 1997 | 14,020 | 522 | 2,716 | 2,674 | 2,966 | 1,669 | 1,100 | 737 | 489 | 278 | ... | ... | 869 |
| 1998 | 14,230 | 510 | 2,643 | 2,675 | 3,011 | 1,717 | 1,157 | 777 | 505 | 387 | ... | ... | 848 |
| 1999 | 14,500 | 485 | 2,573 | 2,688 | 3,075 | 1,756 | 1,191 | 804 | 535 | 384 | 162 | ... | 848 |
| 2000 ^a | 14,725 | 512 | 2,532 | 2,674 | 3,079 | 1,768 | 1,216 | 830 | 573 | 410 | 276 | ... | 856 |
| 2001 ^a | 14,875 | 511 | 2,548 | 2,665 | 3,143 | 1,746 | 1,198 | 844 | 593 | 405 | 321 | 85 | 816 |
| 2002 ^a | 15,150 | 527 | 2,639 | 2,731 | 3,244 | 1,713 | 1,170 | 837 | 598 | 423 | 307 | 199 | 762 |
| Men | | | | | | | | | | | | | |
| 1992 | 8,798 | 288 | 1,603 | 1,606 | 1,936 | 1,145 | 746 | 485 | 253 | ... | ... | ... | 734 |
| 1993 | 8,840 | 291 | 1,559 | 1,632 | 1,927 | 1,141 | 760 | 500 | 316 | ... | ... | ... | 715 |
| 1994 | 8,839 | 268 | 1,511 | 1,552 | 1,958 | 1,153 | 772 | 503 | 340 | 77 | ... | ... | 705 |
| 1995 | 8,908 | 256 | 1,492 | 1,581 | 1,964 | 1,152 | 782 | 521 | 356 | 96 | ... | ... | 708 |
| 1996 | 9,074 | 247 | 1,468 | 1,598 | 1,997 | 1,176 | 807 | 545 | 367 | 141 | ... | ... | 729 |
| 1997 | 9,078 | 255 | 1,429 | 1,550 | 1,980 | 1,171 | 796 | 559 | 381 | 223 | ... | ... | 735 |
| 1998 | 9,109 | 247 | 1,378 | 1,518 | 1,955 | 1,189 | 831 | 584 | 389 | 309 | ... | ... | 710 |
| 1999 | 9,225 | 233 | 1,336 | 1,497 | 1,972 | 1,202 | 848 | 591 | 409 | 299 | 129 | ... | 709 |
| 2000 ^a | 9,250 | 240 | 1,314 | 1,454 | 1,946 | 1,185 | 849 | 598 | 424 | 312 | 216 | ... | 711 |
| 2001 ^a | 9,232 | 241 | 1,302 | 1,442 | 1,938 | 1,157 | 818 | 603 | 429 | 308 | 252 | 68 | 674 |
| 2002 ^a | 9,275 | 252 | 1,362 | 1,456 | 1,951 | 1,117 | 792 | 584 | 434 | 310 | 233 | 156 | 628 |
| Women | | | | | | | | | | | | | |
| 1992 | 4,302 | 305 | 1,323 | 913 | 819 | 431 | 225 | 127 | 55 | ... | ... | ... | 105 |
| 1993 | 4,360 | 296 | 1,308 | 930 | 849 | 429 | 230 | 133 | 73 | ... | ... | ... | 113 |
| 1994 | 4,460 | 282 | 1,314 | 957 | 873 | 435 | 246 | 142 | 85 | 15 | ... | ... | 109 |
| 1995 | 4,592 | 280 | 1,289 | 1,012 | 918 | 452 | 261 | 157 | 88 | 20 | ... | ... | 114 |
| 1996 | 4,826 | 274 | 1,323 | 1,069 | 967 | 475 | 285 | 168 | 104 | 35 | ... | ... | 125 |
| 1997 | 4,942 | 267 | 1,287 | 1,125 | 985 | 499 | 303 | 178 | 108 | 55 | ... | ... | 134 |
| 1998 | 5,121 | 264 | 1,265 | 1,157 | 1,056 | 528 | 327 | 193 | 116 | 78 | ... | ... | 138 |
| 1999 | 5,276 | 251 | 1,237 | 1,191 | 1,103 | 554 | 343 | 212 | 126 | 85 | 33 | ... | 139 |
| 2000 ^a | 5,475 | 272 | 1,219 | 1,220 | 1,133 | 583 | 367 | 232 | 149 | 97 | 59 | ... | 145 |
| 2001 ^a | 5,643 | 270 | 1,246 | 1,223 | 1,205 | 589 | 380 | 242 | 164 | 97 | 69 | 17 | 142 |
| 2002 ^a | 5,874 | 275 | 1,277 | 1,275 | 1,293 | 596 | 378 | 253 | 163 | 113 | 74 | 42 | 134 |

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

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

... = not applicable.

a. Preliminary data.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B OASDI: Covered Workers

Table 4.B10—Number of workers with Social Security (OASDI) taxable earnings, amount taxable, and contributions, by state or other area and type of earnings, 2002

| State or area ^a | Number ^b (thousands) | | | Taxable earnings ^c (millions of dollars) | | | OASDI contributions ^d (millions of dollars) | | |
|----------------------------|------------------------------------|-----------------|---------------|--|-----------------|---------------|---|-----------------|---------------|
| | Total | Wage and salary | Self-employed | Total | Wage and salary | Self-employed | Total | Wage and salary | Self-employed |
| All areas | 153,837 | 144,897 | 15,150 | 4,243,164 | 4,015,000 | 228,164 | 526,152 | 497,860 | 28,292 |
| Alabama | 2,252 | 2,132 | 209 | 54,224 | 51,608 | 2,616 | 6,724 | 6,399 | 324 |
| Alaska | 369 | 347 | 39 | 9,832 | 9,250 | 582 | 1,219 | 1,147 | 72 |
| Arizona | 2,660 | 2,531 | 224 | 71,170 | 67,928 | 3,242 | 8,825 | 8,423 | 402 |
| Arkansas | 1,383 | 1,296 | 146 | 30,295 | 28,562 | 1,732 | 3,757 | 3,542 | 215 |
| California | 16,587 | 15,254 | 2,047 | 500,748 | 462,791 | 37,957 | 62,093 | 57,386 | 4,707 |
| Colorado | 2,397 | 2,234 | 277 | 68,726 | 64,343 | 4,383 | 8,522 | 7,979 | 544 |
| Connecticut | 1,935 | 1,808 | 206 | 64,437 | 60,111 | 4,326 | 7,990 | 7,454 | 536 |
| Delaware | 481 | 464 | 30 | 14,101 | 13,650 | 451 | 1,749 | 1,693 | 56 |
| District of Columbia | 356 | 342 | 28 | 11,884 | 11,244 | 640 | 1,474 | 1,394 | 79 |
| Florida | 8,556 | 8,024 | 917 | 215,149 | 204,231 | 10,918 | 26,678 | 25,325 | 1,354 |
| Georgia | 4,453 | 4,211 | 420 | 121,188 | 115,411 | 5,777 | 15,027 | 14,311 | 716 |
| Hawaii | 673 | 636 | 64 | 18,454 | 17,535 | 918 | 2,288 | 2,174 | 114 |
| Idaho | 703 | 660 | 75 | 16,246 | 15,321 | 926 | 2,015 | 1,900 | 115 |
| Illinois | 6,528 | 6,173 | 611 | 189,578 | 180,532 | 9,046 | 23,508 | 22,386 | 1,122 |
| Indiana | 3,467 | 3,314 | 296 | 90,841 | 86,870 | 3,971 | 11,264 | 10,772 | 492 |
| Iowa | 1,688 | 1,583 | 190 | 41,116 | 38,760 | 2,357 | 5,098 | 4,806 | 292 |
| Kansas | 1,550 | 1,470 | 150 | 40,111 | 38,009 | 2,102 | 4,974 | 4,713 | 261 |
| Kentucky | 2,132 | 2,009 | 216 | 50,823 | 48,340 | 2,482 | 6,302 | 5,994 | 308 |
| Louisiana | 2,108 | 1,979 | 212 | 48,584 | 45,692 | 2,892 | 6,024 | 5,666 | 359 |
| Maine | 718 | 663 | 91 | 17,144 | 15,857 | 1,287 | 2,126 | 1,966 | 160 |
| Maryland | 3,088 | 2,943 | 264 | 101,034 | 96,604 | 4,430 | 12,528 | 11,979 | 549 |
| Massachusetts | 3,421 | 3,189 | 373 | 109,267 | 102,428 | 6,840 | 13,549 | 12,701 | 848 |
| Michigan | 5,498 | 5,254 | 445 | 157,254 | 151,164 | 6,090 | 19,499 | 18,744 | 755 |
| Minnesota | 3,000 | 2,841 | 305 | 87,280 | 82,973 | 4,307 | 10,823 | 10,289 | 534 |
| Mississippi | 1,379 | 1,300 | 134 | 30,268 | 28,528 | 1,740 | 3,753 | 3,537 | 216 |
| Missouri | 3,066 | 2,898 | 297 | 76,155 | 72,349 | 3,806 | 9,443 | 8,971 | 472 |
| Montana | 509 | 467 | 73 | 10,638 | 9,713 | 925 | 1,319 | 1,204 | 115 |
| Nebraska | 1,014 | 957 | 107 | 24,715 | 23,408 | 1,308 | 3,065 | 2,903 | 162 |
| Nevada | 1,099 | 1,048 | 86 | 28,135 | 26,776 | 1,359 | 3,489 | 3,320 | 168 |
| New Hampshire | 767 | 717 | 83 | 23,051 | 21,628 | 1,422 | 2,858 | 2,682 | 176 |
| New Jersey | 4,728 | 4,491 | 408 | 163,269 | 155,444 | 7,825 | 20,245 | 19,275 | 970 |
| New Mexico | 906 | 857 | 87 | 21,099 | 20,053 | 1,045 | 2,616 | 2,487 | 130 |
| New York | 9,873 | 9,252 | 1,039 | 304,426 | 288,572 | 15,854 | 37,749 | 35,783 | 1,966 |
| North Carolina | 4,461 | 4,212 | 424 | 115,778 | 109,753 | 6,024 | 14,356 | 13,609 | 747 |
| North Dakota | 367 | 339 | 49 | 8,202 | 7,584 | 618 | 1,017 | 940 | 77 |
| Ohio | 5,961 | 5,631 | 549 | 152,729 | 145,209 | 7,520 | 18,938 | 18,006 | 932 |
| Oklahoma | 1,812 | 1,697 | 192 | 41,580 | 39,342 | 2,238 | 5,156 | 4,878 | 277 |
| Oregon | 1,880 | 1,764 | 186 | 50,005 | 47,117 | 2,888 | 6,201 | 5,843 | 358 |
| Pennsylvania | 6,695 | 6,363 | 564 | 188,218 | 178,969 | 9,249 | 23,339 | 22,192 | 1,147 |
| Rhode Island | 608 | 579 | 56 | 17,367 | 16,497 | 870 | 2,154 | 2,046 | 108 |
| South Carolina | 2,148 | 2,043 | 181 | 52,726 | 50,305 | 2,420 | 6,538 | 6,238 | 300 |
| South Dakota | 448 | 417 | 58 | 9,593 | 8,879 | 715 | 1,190 | 1,101 | 89 |
| Tennessee | 3,119 | 2,921 | 337 | 78,407 | 73,334 | 5,072 | 9,722 | 9,093 | 629 |
| Texas | 10,507 | 9,805 | 1,172 | 278,283 | 261,730 | 16,554 | 34,507 | 32,454 | 2,053 |
| Utah | 1,214 | 1,166 | 102 | 29,166 | 28,001 | 1,165 | 3,617 | 3,472 | 144 |

(Continued)

Table 4.B10—Number of workers with Social Security (OASDI) taxable earnings, amount taxable, and contributions, by state or other area and type of earnings, 2002—Continued

| State or area ^a | Number ^b (thousands) | | | Taxable earnings ^c (millions of dollars) | | | OASDI contributions ^d (millions of dollars) | | |
|--------------------------------|------------------------------------|-----------------|---------------|--|-----------------|---------------|---|-----------------|---------------|
| | Total | Wage and salary | Self-employed | Total | Wage and salary | Self-employed | Total | Wage and salary | Self-employed |
| Vermont | 378 | 352 | 47 | 9,445 | 8,803 | 642 | 1,171 | 1,092 | 80 |
| Virginia | 4,119 | 3,929 | 342 | 124,754 | 119,369 | 5,384 | 15,469 | 14,802 | 668 |
| Washington | 3,269 | 3,102 | 288 | 97,402 | 92,640 | 4,763 | 12,078 | 11,487 | 591 |
| West Virginia | 867 | 821 | 79 | 19,996 | 18,970 | 1,026 | 2,479 | 2,352 | 127 |
| Wisconsin | 3,199 | 3,058 | 262 | 87,078 | 83,447 | 3,631 | 10,798 | 10,347 | 450 |
| Wyoming | 296 | 278 | 34 | 7,045 | 6,595 | 450 | 874 | 818 | 56 |
| Outlying area | | | | | | | | | |
| Puerto Rico | 1,157 | 1,095 | 70 | 19,269 | 18,002 | 1,267 | 2,389 | 2,232 | 157 |
| Other and unknown ^e | 1,986 | 1,980 | 8 | 44,879 | 44,770 | 109 | 5,565 | 5,551 | 14 |

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

NOTE: Data are based on preliminary estimates.

- State designation based primarily on employee end-of-year residence, obtained from employer wage reports filed via magnetic media. State designation based on location of employer for reports filed via paper.
- Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total. National and state totals and subtotals are unduplicated counts of workers in each type of employment.
- Annual maximum taxable earnings for Social Security (OASDI) from a single employer or from self-employment were \$84,900 in 2002.
- For 2002 earnings, paid at the rate of 6.2 percent of taxable wages by both employees and employers, 6.2 percent of taxable tips by employees, and 12.4 percent of self-employment income by self-employed workers. Data are unadjusted for multi-employer tax refunds.
- Persons employed in American Samoa, Guam, Northern Mariana Islands, and Virgin Islands; U.S. citizens employed abroad by U.S. employers; persons employed on U.S. oceanborne vessels; and workers with unknown residence.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B OASDI: Covered Workers

Table 4.B11—Number of workers with Social Security (OASDI) taxable earnings, amount taxable, and contributions, by type of earnings, selected years 1937–2003

| Year | Number ^a (thousands) | | | Taxable earnings ^b (millions of dollars) | | | OASDI contributions ^{c,d} (millions of dollars) | | |
|------|------------------------------------|-----------------|---------------|--|-----------------|---------------|---|-----------------|---------------|
| | Total | Wage and salary | Self-employed | Total | Wage and salary | Self-employed | Total | Wage and salary | Self-employed |
| 1937 | 32,900 | 32,900 | ... | 29,620 | 29,620 | ... | 592 | 592 | ... |
| 1940 | 35,390 | 35,390 | ... | 32,970 | 32,970 | ... | 659 | 659 | ... |
| 1945 | 46,390 | 46,390 | ... | 62,950 | 62,950 | ... | 1,259 | 1,259 | ... |
| 1950 | 48,280 | 48,280 | ... | 87,500 | 87,500 | ... | 2,625 | 2,625 | ... |
| 1951 | 58,120 | 54,630 | 4,190 | 120,770 | 111,250 | 9,520 | 3,552 | 3,338 | 214 |
| 1952 | 59,580 | 56,060 | 4,240 | 128,640 | 118,880 | 9,760 | 3,786 | 3,566 | 220 |
| 1953 | 60,840 | 57,220 | 4,340 | 135,870 | 125,840 | 10,030 | 4,001 | 3,775 | 226 |
| 1954 | 59,610 | 55,940 | 4,350 | 133,520 | 123,410 | 10,110 | 5,240 | 4,936 | 303 |
| 1955 | 65,200 | 59,560 | 6,810 | 157,540 | 141,810 | 15,730 | 6,144 | 5,672 | 472 |
| 1956 | 67,610 | 61,560 | 7,390 | 170,720 | 153,010 | 17,710 | 6,652 | 6,120 | 531 |
| 1957 | 70,590 | 64,730 | 7,150 | 181,380 | 163,990 | 17,390 | 7,966 | 7,380 | 587 |
| 1958 | 69,770 | 64,040 | 7,130 | 180,720 | 163,140 | 17,580 | 7,935 | 7,341 | 593 |
| 1959 | 71,700 | 66,000 | 7,060 | 202,310 | 183,620 | 18,690 | 9,882 | 9,181 | 701 |
| 1960 | 72,530 | 66,980 | 6,870 | 207,000 | 188,580 | 18,420 | 12,144 | 11,315 | 829 |
| 1961 | 72,820 | 67,360 | 6,790 | 209,640 | 190,850 | 18,790 | 12,297 | 11,451 | 846 |
| 1962 | 74,280 | 68,890 | 6,720 | 219,050 | 200,130 | 18,920 | 13,397 | 12,508 | 889 |
| 1963 | 75,540 | 70,310 | 6,590 | 225,550 | 206,840 | 18,710 | 16,006 | 14,996 | 1,010 |
| 1964 | 77,430 | 72,230 | 6,480 | 236,390 | 217,430 | 18,960 | 16,788 | 15,764 | 1,024 |
| 1965 | 80,680 | 75,430 | 6,550 | 250,730 | 230,830 | 19,900 | 17,810 | 16,735 | 1,075 |
| 1966 | 84,600 | 79,460 | 6,630 | 312,540 | 287,860 | 24,680 | 23,597 | 22,165 | 1,431 |
| 1967 | 87,040 | 82,020 | 6,470 | 329,960 | 305,670 | 24,290 | 25,275 | 23,842 | 1,433 |
| 1968 | 89,380 | 84,470 | 6,570 | 375,800 | 348,500 | 27,300 | 28,069 | 26,486 | 1,583 |
| 1969 | 92,060 | 87,200 | 6,350 | 402,510 | 375,010 | 27,500 | 33,233 | 31,501 | 1,733 |
| 1970 | 93,090 | 88,180 | 6,270 | 415,580 | 388,680 | 26,900 | 34,344 | 32,649 | 1,695 |
| 1971 | 93,340 | 88,460 | 6,290 | 426,950 | 399,550 | 27,400 | 38,649 | 36,759 | 1,891 |
| 1972 | 96,240 | 91,220 | 6,600 | 484,150 | 452,050 | 32,100 | 43,804 | 41,589 | 2,215 |
| 1973 | 99,830 | 94,610 | 7,100 | 561,850 | 523,450 | 38,400 | 53,463 | 50,775 | 2,688 |
| 1974 | 101,330 | 96,190 | 7,040 | 636,800 | 594,400 | 42,400 | 61,814 | 58,846 | 2,968 |
| 1975 | 100,200 | 94,900 | 7,000 | 664,700 | 621,100 | 43,600 | 64,541 | 61,489 | 3,052 |
| 1976 | 102,600 | 97,230 | 7,400 | 737,700 | 689,200 | 48,500 | 71,626 | 68,231 | 3,395 |
| 1977 | 105,800 | 100,450 | 7,480 | 816,600 | 763,600 | 53,000 | 79,306 | 75,596 | 3,710 |
| 1978 | 110,600 | 104,810 | 8,040 | 915,600 | 856,100 | 59,500 | 90,691 | 86,466 | 4,225 |
| 1979 | 112,700 | 106,900 | 8,200 | 1,067,000 | 997,500 | 69,500 | 106,246 | 101,346 | 4,900 |
| 1980 | 113,000 | 107,200 | 8,200 | 1,180,700 | 1,109,000 | 71,700 | 117,729 | 112,674 | 5,055 |
| 1981 | 113,000 | 107,300 | 8,250 | 1,294,100 | 1,220,000 | 74,100 | 136,468 | 130,540 | 5,928 |
| 1982 | 111,800 | 105,800 | 8,550 | 1,365,300 | 1,290,000 | 75,300 | 145,382 | 139,320 | 6,062 |
| 1983 | 112,100 | 105,900 | 9,200 | 1,454,100 | 1,369,000 | 85,100 | 154,703 | 147,852 | 6,851 |
| 1984 | 116,300 | 109,900 | 9,900 | 1,608,800 | 1,515,000 | 93,800 | 183,403 | 172,710 | 10,693 |
| 1985 | 119,800 | 113,400 | 10,600 | 1,722,600 | 1,621,000 | 101,600 | 196,376 | 184,794 | 11,582 |
| 1986 | 122,900 | 115,900 | 11,200 | 1,844,400 | 1,730,800 | 113,600 | 210,262 | 197,311 | 12,950 |
| 1987 | 125,600 | 118,200 | 12,000 | 1,960,000 | 1,835,100 | 124,900 | 223,440 | 209,201 | 14,239 |
| 1988 | 129,600 | 122,100 | 12,400 | 2,088,400 | 1,952,000 | 136,400 | 253,114 | 236,582 | 16,532 |
| 1989 | 131,700 | 123,900 | 12,900 | 2,239,500 | 2,096,000 | 143,500 | 271,427 | 254,035 | 17,392 |
| 1990 | 133,600 | 126,100 | 12,500 | 2,358,000 | 2,222,000 | 136,000 | 292,392 | 275,528 | 16,864 |
| 1991 | 133,000 | 125,200 | 12,800 | 2,422,500 | 2,283,000 | 139,500 | 300,390 | 283,092 | 17,298 |
| 1992 | 134,000 | 126,000 | 13,100 | 2,532,900 | 2,386,000 | 146,900 | 314,080 | 295,864 | 18,216 |
| 1993 | 136,100 | 128,100 | 13,200 | 2,636,100 | 2,483,400 | 152,700 | 326,876 | 307,942 | 18,935 |
| 1994 | 138,200 | 130,100 | 13,300 | 2,785,200 | 2,624,500 | 160,700 | 345,365 | 325,438 | 19,927 |

(Continued)

Table 4.B11—Number of workers with Social Security (OASDI) taxable earnings, amount taxable, and contributions, by type of earnings, selected years 1937–2003—Continued

| Year | Number ^a (thousands) | | | Taxable earnings ^b (millions of dollars) | | | OASDI contributions ^{c,d} (millions of dollars) | | |
|-------------------|------------------------------------|-----------------|---------------|--|-----------------|---------------|---|-----------------|---------------|
| | Total | Wage and salary | Self-employed | Total | Wage and salary | Self-employed | Total | Wage and salary | Self-employed |
| 1995 | 141,000 | 132,800 | 13,500 | 2,919,100 | 2,754,300 | 164,800 | 361,968 | 341,533 | 20,435 |
| 1996 | 143,400 | 135,100 | 13,900 | 3,073,500 | 2,901,700 | 171,800 | 381,114 | 359,811 | 21,303 |
| 1997 | 146,145 | 137,765 | 14,020 | 3,285,000 | 3,104,300 | 180,700 | 407,340 | 384,933 | 22,407 |
| 1998 | 148,786 | 140,386 | 14,230 | 3,524,900 | 3,333,700 | 191,200 | 437,088 | 413,379 | 23,709 |
| 1999 | 151,333 | 142,703 | 14,500 | 3,749,600 | 3,547,300 | 202,300 | 464,950 | 439,865 | 25,085 |
| 2000 ^e | 153,691 | 145,046 | 14,725 | 4,008,400 | 3,798,900 | 209,500 | 497,042 | 471,064 | 25,978 |
| 2001 ^e | 153,716 | 144,921 | 14,875 | 4,170,100 | 3,953,600 | 216,500 | 517,092 | 490,246 | 26,846 |
| 2002 ^f | 153,837 | 144,897 | 15,150 | 4,243,164 | 4,015,000 | 228,164 | 526,152 | 497,860 | 28,292 |
| 2003 ^g | 154,324 | 145,059 | 15,126 | 4,352,138 | 4,110,100 | 242,038 | 539,665 | 509,652 | 30,013 |

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

NOTE: . . . = not applicable.

- a. Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total.
- b. See Table 2.A3 for annual maximum taxable earnings.
- c. See Table 2.A3 for contribution rates.
- d. Unadjusted for multi-employer tax refunds. Unadjusted for tax credits. See Table 2.A5 for information on tax credits.
- e. Preliminary data.
- f. Taxable earnings are preliminary estimates based on Social Security data; employment data are preliminary estimates based on data from Bureau of Labor Statistics and the National Income and Product Accounts.
- g. Preliminary estimates based on data from Bureau of Labor Statistics and Bureau of Economic Analysis.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B HI: Covered Workers

Table 4.B12—Number of workers with Medicare Part A (HI) taxable earnings, amount taxable, and contributions, by state or other area and type of earnings, 2002

| State or area ^a | Number ^b (thousands) | | | Taxable earnings ^c (millions of dollars) | | | HI contributions ^d (millions of dollars) | | |
|----------------------------|------------------------------------|-----------------|---------------|--|-----------------|---------------|--|-----------------|---------------|
| | Total | Wage and salary | Self-employed | Total | Wage and salary | Self-employed | Total | Wage and salary | Self-employed |
| All areas | 157,473 | 148,675 | 15,810 | 5,133,096 | 4,789,600 | 343,496 | 148,860 | 138,898 | 9,961 |
| Alabama | 2,270 | 2,150 | 215 | 60,929 | 56,992 | 3,937 | 1,767 | 1,653 | 114 |
| Alaska | 392 | 372 | 40 | 12,100 | 11,338 | 761 | 351 | 329 | 22 |
| Arizona | 2,675 | 2,546 | 236 | 80,116 | 75,333 | 4,783 | 2,323 | 2,185 | 139 |
| Arkansas | 1,391 | 1,305 | 151 | 33,388 | 31,249 | 2,139 | 968 | 906 | 62 |
| California | 17,397 | 16,100 | 2,138 | 652,233 | 594,587 | 57,646 | 18,915 | 17,243 | 1,672 |
| Colorado | 2,551 | 2,399 | 289 | 87,162 | 80,342 | 6,820 | 2,528 | 2,330 | 198 |
| Connecticut | 1,973 | 1,848 | 221 | 92,208 | 84,095 | 8,113 | 2,674 | 2,439 | 235 |
| Delaware | 484 | 467 | 32 | 15,885 | 15,041 | 844 | 461 | 436 | 24 |
| District of Columbia | 367 | 353 | 30 | 15,976 | 14,264 | 1,712 | 463 | 414 | 50 |
| Florida | 8,632 | 8,102 | 949 | 250,696 | 235,408 | 15,288 | 7,270 | 6,827 | 443 |
| Georgia | 4,557 | 4,318 | 440 | 145,907 | 137,406 | 8,500 | 4,231 | 3,985 | 247 |
| Hawaii | 695 | 659 | 66 | 21,057 | 19,862 | 1,195 | 611 | 576 | 35 |
| Idaho | 707 | 665 | 76 | 17,519 | 16,482 | 1,037 | 508 | 478 | 30 |
| Illinois | 6,761 | 6,416 | 643 | 238,344 | 223,706 | 14,638 | 6,912 | 6,487 | 424 |
| Indiana | 3,487 | 3,334 | 307 | 100,168 | 94,429 | 5,740 | 2,905 | 2,738 | 166 |
| Iowa | 1,697 | 1,591 | 196 | 44,589 | 41,674 | 2,915 | 1,293 | 1,209 | 85 |
| Kansas | 1,558 | 1,478 | 156 | 45,181 | 42,181 | 3,000 | 1,310 | 1,223 | 87 |
| Kentucky | 2,180 | 2,059 | 223 | 57,673 | 54,358 | 3,315 | 1,673 | 1,576 | 96 |
| Louisiana | 2,265 | 2,142 | 219 | 60,000 | 56,068 | 3,932 | 1,740 | 1,626 | 114 |
| Maine | 749 | 695 | 93 | 19,709 | 18,245 | 1,464 | 572 | 529 | 42 |
| Maryland | 3,152 | 3,008 | 283 | 120,985 | 113,608 | 7,377 | 3,509 | 3,295 | 214 |
| Massachusetts | 3,642 | 3,423 | 398 | 146,223 | 135,161 | 11,062 | 4,240 | 3,920 | 321 |
| Michigan | 5,530 | 5,287 | 468 | 178,486 | 170,116 | 8,369 | 5,176 | 4,933 | 243 |
| Minnesota | 3,017 | 2,857 | 318 | 100,595 | 95,187 | 5,408 | 2,917 | 2,760 | 157 |
| Mississippi | 1,388 | 1,309 | 138 | 32,772 | 30,308 | 2,464 | 950 | 879 | 71 |
| Missouri | 3,133 | 2,968 | 306 | 88,217 | 82,702 | 5,515 | 2,558 | 2,398 | 160 |
| Montana | 513 | 471 | 74 | 11,617 | 10,371 | 1,246 | 337 | 301 | 36 |
| Nebraska | 1,020 | 963 | 112 | 27,445 | 25,780 | 1,664 | 796 | 748 | 48 |
| Nevada | 1,160 | 1,111 | 90 | 34,906 | 32,936 | 1,970 | 1,012 | 955 | 57 |
| New Hampshire | 776 | 726 | 87 | 27,474 | 25,551 | 1,924 | 797 | 741 | 56 |
| New Jersey | 4,758 | 4,521 | 442 | 211,851 | 197,915 | 13,935 | 6,144 | 5,740 | 404 |
| New Mexico | 917 | 867 | 88 | 23,222 | 21,995 | 1,227 | 673 | 638 | 36 |
| New York | 9,918 | 9,296 | 1,097 | 402,200 | 370,593 | 31,606 | 11,664 | 10,747 | 917 |
| North Carolina | 4,481 | 4,233 | 440 | 130,663 | 122,173 | 8,491 | 3,789 | 3,543 | 246 |
| North Dakota | 370 | 342 | 50 | 8,731 | 8,051 | 681 | 253 | 233 | 20 |
| Ohio | 6,400 | 6,094 | 571 | 190,500 | 180,141 | 10,358 | 5,524 | 5,224 | 300 |
| Oklahoma | 1,831 | 1,717 | 198 | 45,671 | 43,098 | 2,573 | 1,324 | 1,250 | 75 |
| Oregon | 1,891 | 1,776 | 191 | 55,587 | 51,893 | 3,694 | 1,612 | 1,505 | 107 |
| Pennsylvania | 6,744 | 6,411 | 594 | 219,100 | 205,880 | 13,220 | 6,354 | 5,971 | 383 |
| Rhode Island | 617 | 588 | 59 | 19,932 | 18,693 | 1,239 | 578 | 542 | 36 |
| South Carolina | 2,156 | 2,051 | 187 | 58,282 | 55,009 | 3,273 | 1,690 | 1,595 | 95 |
| South Dakota | 452 | 421 | 59 | 10,370 | 9,494 | 875 | 301 | 275 | 25 |
| Tennessee | 3,143 | 2,944 | 350 | 91,549 | 83,921 | 7,628 | 2,655 | 2,434 | 221 |
| Texas | 11,016 | 10,337 | 1,210 | 341,833 | 318,151 | 23,682 | 9,913 | 9,226 | 687 |
| Utah | 1,225 | 1,177 | 106 | 32,470 | 30,904 | 1,566 | 942 | 896 | 45 |

(Continued)

Table 4.B12—Number of workers with Medicare Part A (HI) taxable earnings, amount taxable, and contributions, by state or other area and type of earnings, 2002—Continued

| State or area ^a | Number ^b (thousands) | | | Taxable earnings ^c (millions of dollars) | | | HI contributions ^d (millions of dollars) | | |
|--------------------------------|------------------------------------|-----------------|---------------|--|-----------------|---------------|--|-----------------|---------------|
| | Total | Wage and salary | Self-employed | Total | Wage and salary | Self-employed | Total | Wage and salary | Self-employed |
| Vermont | 379 | 354 | 49 | 10,343 | 9,528 | 815 | 300 | 276 | 24 |
| Virginia | 4,161 | 3,971 | 359 | 147,086 | 138,160 | 8,927 | 4,266 | 4,007 | 259 |
| Washington | 3,301 | 3,134 | 298 | 113,483 | 107,205 | 6,278 | 3,291 | 3,109 | 182 |
| West Virginia | 875 | 829 | 80 | 21,948 | 20,343 | 1,606 | 637 | 590 | 47 |
| Wisconsin | 3,211 | 3,071 | 274 | 97,264 | 92,490 | 4,774 | 2,821 | 2,682 | 138 |
| Wyoming | 299 | 281 | 36 | 7,749 | 7,165 | 583 | 225 | 208 | 17 |
| Outlying area | | | | | | | | | |
| Puerto Rico | 1,197 | 1,135 | 70 | 21,250 | 19,702 | 1,548 | 616 | 571 | 45 |
| Other and unknown ^e | 2,010 | 2,004 | 8 | 52,457 | 52,317 | 140 | 1,521 | 1,517 | 4 |

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

NOTE: Data are based on preliminary estimates.

- State designation based primarily on employee end-of-year residence, obtained from employer wage reports filed via magnetic media. State designation based on location of employer for reports filed via paper.
- Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total. National and state totals and subtotals are unduplicated counts of workers in each type of employment.
- No annual maximum taxable earnings amount for Medicare.
- For 2002 earnings, paid at the rate of 1.45 percent of taxable wages by both employees and employers, 1.45 percent of taxable tips by employees, and 2.9 percent of self-employment income by self-employed workers.
- Persons employed in American Samoa, Guam, Northern Mariana Islands, and Virgin Islands; U.S. citizens employed abroad by U.S. employers; persons employed on U.S. oceanborne vessels; and workers with unknown residence.

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.B OASDI: Covered Workers

Table 4.B13—Social Security (OASDI) taxable earnings, by sex and age, 2002

| Sex | Total, all ages | Under 20 | 20–29 | 30–39 | 40–49 | 50–59 | 60–61 | 62–64 | 65–69 | 70 or older |
|--|--------------------|----------|---------|-----------|-----------|---------|---------|--------|--------|-------------|
| Social Security (OASDI) taxable earnings (in millions of dollars) | | | | | | | | | | |
| All workers | 4,243,164 | 44,489 | 596,825 | 1,105,414 | 1,282,135 | 912,785 | 101,444 | 90,942 | 65,782 | 43,349 |
| Men | 2,590,702 | 23,693 | 338,511 | 683,953 | 787,628 | 560,308 | 65,018 | 58,811 | 43,813 | 28,966 |
| Women | 1,652,462 | 20,796 | 258,313 | 421,460 | 494,507 | 352,477 | 36,426 | 32,131 | 21,968 | 14,384 |
| Percentage distribution, by age | | | | | | | | | | |
| All workers | 100 | 1 | 14 | 26 | 30 | 22 | 2 | 2 | 2 | 1 |
| Men | 100 | 1 | 13 | 26 | 30 | 22 | 3 | 2 | 2 | 1 |
| Women | 100 | 1 | 16 | 26 | 30 | 21 | 2 | 2 | 1 | 1 |
| Percentage distribution, by sex | | | | | | | | | | |
| All workers | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Men | 61 | 53 | 57 | 62 | 61 | 61 | 64 | 65 | 67 | 67 |
| Women | 39 | 47 | 43 | 38 | 39 | 39 | 36 | 35 | 33 | 33 |

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

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

Table 4.B14—Medicare (HI) taxable earnings, by sex and age, 2002

| Sex | Total, all ages | Under 20 | 20–29 | 30–39 | 40–49 | 50–59 | 60–61 | 62–64 | 65–69 | 70 or older |
|--|--------------------|----------|---------|-----------|-----------|-----------|---------|---------|--------|-------------|
| Medicare (HI) taxable earnings (in millions of dollars) | | | | | | | | | | |
| All workers | 5,133,096 | 45,090 | 626,103 | 1,275,732 | 1,607,889 | 1,187,778 | 128,514 | 120,688 | 84,427 | 56,875 |
| Men | 3,300,304 | 24,063 | 356,170 | 812,888 | 1,045,901 | 786,390 | 88,140 | 85,758 | 60,189 | 40,805 |
| Women | 1,832,792 | 21,027 | 269,933 | 462,844 | 561,988 | 401,388 | 40,374 | 34,930 | 24,238 | 16,070 |
| Percentage distribution, by age | | | | | | | | | | |
| All workers | 100 | 1 | 12 | 25 | 31 | 23 | 3 | 2 | 2 | 1 |
| Men | 100 | 1 | 11 | 25 | 32 | 24 | 3 | 3 | 2 | 1 |
| Women | 100 | 1 | 15 | 25 | 31 | 22 | 2 | 2 | 1 | 1 |
| Percentage distribution, by sex | | | | | | | | | | |
| All workers | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Men | 64 | 53 | 57 | 64 | 65 | 66 | 69 | 71 | 71 | 72 |
| Women | 36 | 47 | 43 | 36 | 35 | 34 | 31 | 29 | 29 | 28 |

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

CONTACT: Greg Diez (410) 965-0153 or William Kearns (410) 965-6750.

4.C OASDI: Insured Workers

Table 4.C1—Estimated number, by insured status, December 31, 1940–2004 (in millions)

| Year | Workers fully insured for retirement benefits, survivor benefits, or both | | | Workers insured for disability benefits |
|------|---|---------------------|-------------------------|---|
| | Total | Permanently insured | Not permanently insured | |
| 1940 | 24.2 | 1.1 | 23.1 | ... |
| 1941 | 25.8 | 1.4 | 24.4 | ... |
| 1942 | 28.1 | 1.8 | 26.3 | ... |
| 1943 | 29.9 | 2.3 | 27.6 | ... |
| 1944 | 31.9 | 2.8 | 29.1 | ... |
| 1945 | 33.4 | 3.4 | 30.0 | ... |
| 1946 | 35.4 | 8.6 | 26.8 | ... |
| 1947 | 37.3 | 11.6 | 25.7 | ... |
| 1948 | 38.9 | 13.2 | 25.7 | ... |
| 1949 | 40.1 | 14.9 | 25.2 | ... |
| 1950 | 59.8 | 21.0 | 38.8 | ... |
| 1951 | 62.8 | 22.9 | 39.9 | ... |
| 1952 | 68.2 | 25.6 | 42.7 | ... |
| 1953 | 71.0 | 27.7 | 43.4 | ... |
| 1954 | 70.2 | 29.9 | 40.4 | 31.9 |
| 1955 | 70.5 | 32.5 | 38.0 | 35.4 |
| 1956 | 74.0 | 36.1 | 38.0 | 37.2 |
| 1957 | 76.1 | 38.3 | 37.9 | 38.4 |
| 1958 | 76.5 | 40.3 | 36.2 | 43.4 |
| 1959 | 76.7 | 42.2 | 34.6 | 46.4 |
| 1960 | 84.4 | 47.6 | 36.8 | 48.5 |
| 1961 | 88.5 | 53.3 | 35.3 | 50.5 |
| 1962 | 89.8 | 54.9 | 34.8 | 51.5 |
| 1963 | 91.3 | 56.6 | 34.7 | 52.3 |
| 1964 | 92.8 | 58.3 | 34.5 | 53.3 |
| 1965 | 94.8 | 60.2 | 34.6 | 55.0 |
| 1966 | 97.2 | 61.9 | 35.3 | 55.7 |
| 1967 | 99.9 | 63.3 | 36.6 | 56.9 |
| 1968 | 102.6 | 64.5 | 38.1 | 70.1 |
| 1969 | 105.7 | 66.1 | 39.5 | 72.4 |
| 1970 | 108.4 | 67.4 | 41.0 | 74.5 |
| 1971 | 110.9 | 68.6 | 42.4 | 76.1 |
| 1972 | 113.5 | 69.9 | 43.7 | 77.8 |
| 1973 | 116.9 | 71.3 | 45.6 | 80.4 |
| 1974 | 120.3 | 72.8 | 47.5 | 83.3 |
| 1975 | 123.2 | 74.4 | 48.8 | 85.3 |
| 1976 | 126.1 | 76.2 | 49.9 | 87.0 |
| 1977 | 129.1 | 78.2 | 50.9 | 89.3 |
| 1978 | 133.4 | 80.4 | 53.0 | 93.7 |
| 1979 | 137.4 | 83.1 | 54.3 | 98.0 |
| 1980 | 140.5 | 85.4 | 55.0 | 100.3 |
| 1981 | 142.9 | 88.1 | 54.9 | 102.6 |
| 1982 | 144.8 | 90.8 | 54.0 | 104.5 |
| 1983 | 146.6 | 94.1 | 52.5 | 105.4 |
| 1984 | 148.4 | 97.0 | 51.4 | 107.1 |
| 1985 | 151.0 | 100.2 | 50.8 | 109.6 |
| 1986 | 153.3 | 103.4 | 49.9 | 111.6 |
| 1987 | 155.8 | 107.5 | 48.3 | 113.5 |
| 1988 | 158.4 | 110.8 | 47.6 | 115.7 |
| 1989 | 161.5 | 113.7 | 47.8 | 118.1 |
| 1990 | 164.0 | 116.4 | 47.6 | 120.1 |
| 1991 | 165.9 | 118.7 | 47.2 | 121.5 |
| 1992 | 167.4 | 121.0 | 46.4 | 122.9 |
| 1993 | 169.2 | 123.6 | 45.6 | 124.4 |
| 1994 | 170.8 | 125.9 | 44.9 | 126.2 |

(Continued)

Table 4.C1—Estimated number, by insured status, December 31, 1940–2004 (in millions)—Continued

| Year | Workers fully insured for retirement benefits, survivor benefits, or both | | | Workers insured for disability benefits |
|------|---|---------------------|-------------------------|---|
| | Total | Permanently insured | Not permanently insured | |
| 1995 | 173.2 | 128.4 | 44.8 | 128.2 |
| 1996 | 175.4 | 130.9 | 44.4 | 130.3 |
| 1997 | 177.8 | 133.8 | 44.0 | 132.4 |
| 1998 | 180.3 | 136.4 | 44.0 | 134.7 |
| 1999 | 182.9 | 138.7 | 44.2 | 137.1 |
| 2000 | 185.4 | 140.6 | 44.8 | 139.3 |
| 2001 | 187.7 | 142.5 | 45.1 | 141.0 |
| 2002 | 189.6 | 144.6 | 44.9 | 142.6 |
| 2003 | 191.7 | 146.6 | 45.1 | 144.6 |
| 2004 | 194.0 | 148.6 | 45.4 | 146.7 |

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

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, sex, and age, December 31, 1970–2004, selected years (in thousands)

| Year | Total, all ages | Under 20 | 20–24 | 25–29 | 30–34 | 35–39 | 40–44 | 45–49 | 50–54 | 55–59 | 60–64 | 65–69 | 70–74 | 75 or older |
|--|-----------------|----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|-------|-------|-------------|
| <i>Fully insured for retirement benefits, survivor benefits, or both</i> | | | | | | | | | | | | | | |
| <i>Total</i> | | | | | | | | | | | | | | |
| 1970 | 108,415 | 4,104 | 14,972 | 12,704 | 10,156 | 9,220 | 9,686 | 10,028 | 9,172 | 7,925 | 6,686 | 5,262 | 3,798 | 4,703 |
| 1975 | 123,230 | 5,304 | 16,938 | 17,056 | 12,716 | 10,148 | 9,238 | 9,606 | 9,719 | 8,634 | 7,525 | 6,227 | 4,405 | 5,714 |
| 1980 | 140,471 | 6,558 | 19,153 | 19,270 | 17,199 | 12,785 | 10,240 | 9,211 | 9,404 | 9,270 | 8,242 | 6,984 | 5,219 | 6,937 |
| 1985 | 150,972 | 4,301 | 17,735 | 20,771 | 19,299 | 17,100 | 12,780 | 10,206 | 9,044 | 9,023 | 8,857 | 7,538 | 5,915 | 8,402 |
| 1990 | 164,004 | 4,805 | 16,446 | 20,466 | 21,098 | 19,316 | 17,124 | 12,718 | 10,045 | 8,753 | 8,800 | 8,161 | 6,397 | 9,875 |
| 1991 | 165,902 | 4,325 | 16,436 | 19,971 | 21,328 | 19,805 | 17,417 | 13,742 | 10,482 | 8,807 | 8,693 | 8,119 | 6,609 | 10,168 |
| 1992 | 167,437 | 3,960 | 16,139 | 19,380 | 21,369 | 20,310 | 17,761 | 14,477 | 11,123 | 9,008 | 8,508 | 8,160 | 6,759 | 10,484 |
| 1993 | 169,235 | 3,743 | 15,772 | 18,868 | 21,390 | 20,676 | 18,269 | 15,214 | 11,659 | 9,286 | 8,518 | 8,203 | 6,858 | 10,778 |
| 1994 | 170,832 | 3,753 | 15,247 | 18,545 | 21,246 | 20,988 | 18,799 | 16,065 | 12,151 | 9,471 | 8,399 | 8,129 | 7,016 | 11,025 |
| 1995 | 173,155 | 3,983 | 14,807 | 18,602 | 20,852 | 21,258 | 19,347 | 17,021 | 12,508 | 9,737 | 8,496 | 8,123 | 7,070 | 11,350 |
| 1996 | 175,359 | 4,226 | 14,583 | 18,555 | 20,358 | 21,440 | 19,810 | 17,309 | 13,532 | 10,165 | 8,533 | 8,086 | 7,050 | 11,712 |
| 1997 | 177,817 | 4,377 | 14,725 | 18,431 | 19,823 | 21,498 | 20,317 | 17,643 | 14,261 | 10,792 | 8,816 | 8,032 | 7,092 | 12,010 |
| 1998 | 180,340 | 4,641 | 15,019 | 18,168 | 19,371 | 21,595 | 20,666 | 18,146 | 14,976 | 11,322 | 9,083 | 7,962 | 7,102 | 12,289 |
| 1999 | 182,903 | 4,860 | 15,399 | 17,844 | 19,122 | 21,489 | 21,021 | 18,683 | 15,811 | 11,809 | 9,250 | 8,015 | 7,044 | 12,557 |
| 2000 | 185,361 | 4,909 | 15,867 | 17,373 | 19,181 | 21,172 | 21,332 | 19,208 | 16,667 | 12,226 | 9,543 | 8,044 | 7,046 | 12,795 |
| 2001 | 187,668 | 4,788 | 16,307 | 17,168 | 19,182 | 20,706 | 21,552 | 19,721 | 17,064 | 12,986 | 10,024 | 8,145 | 7,011 | 13,015 |
| 2002 | 189,554 | 4,615 | 16,445 | 17,071 | 19,136 | 20,240 | 21,655 | 20,220 | 17,447 | 13,747 | 10,469 | 8,288 | 6,981 | 13,240 |
| 2003 | 191,748 | 4,525 | 16,613 | 17,275 | 18,880 | 19,821 | 21,710 | 20,616 | 17,894 | 14,527 | 10,939 | 8,545 | 6,932 | 13,471 |
| 2004 | 193,952 | 4,476 | 16,593 | 17,651 | 18,480 | 19,590 | 21,640 | 20,975 | 18,419 | 15,358 | 11,400 | 8,796 | 6,994 | 13,579 |
| <i>Male</i> | | | | | | | | | | | | | | |
| 1970 | 62,945 | 2,702 | 8,563 | 7,108 | 5,861 | 5,431 | 5,681 | 5,766 | 5,297 | 4,694 | 3,905 | 3,025 | 2,172 | 2,742 |
| 1975 | 69,314 | 3,210 | 9,376 | 9,229 | 7,153 | 5,847 | 5,368 | 5,543 | 5,527 | 4,920 | 4,279 | 3,426 | 2,413 | 3,024 |
| 1980 | 76,634 | 3,700 | 10,223 | 10,198 | 9,310 | 7,119 | 5,788 | 5,247 | 5,339 | 5,213 | 4,567 | 3,763 | 2,752 | 3,416 |
| 1985 | 80,723 | 2,325 | 9,407 | 10,871 | 10,233 | 9,219 | 7,029 | 5,676 | 5,073 | 5,052 | 4,862 | 3,992 | 3,067 | 3,917 |
| 1990 | 86,476 | 2,568 | 8,651 | 10,728 | 11,050 | 10,179 | 9,109 | 6,889 | 5,513 | 4,850 | 4,820 | 4,336 | 3,298 | 4,486 |
| 1991 | 87,278 | 2,303 | 8,613 | 10,475 | 11,174 | 10,418 | 9,205 | 7,407 | 5,719 | 4,872 | 4,767 | 4,315 | 3,409 | 4,603 |
| 1992 | 87,883 | 2,077 | 8,466 | 10,155 | 11,198 | 10,678 | 9,344 | 7,752 | 6,042 | 4,967 | 4,660 | 4,335 | 3,484 | 4,726 |
| 1993 | 88,577 | 1,958 | 8,248 | 9,866 | 11,215 | 10,854 | 9,584 | 8,097 | 6,299 | 5,098 | 4,644 | 4,331 | 3,538 | 4,845 |
| 1994 | 89,229 | 1,962 | 7,960 | 9,685 | 11,134 | 10,998 | 9,852 | 8,505 | 6,533 | 5,168 | 4,576 | 4,295 | 3,617 | 4,945 |
| 1995 | 90,214 | 2,078 | 7,677 | 9,686 | 10,930 | 11,120 | 10,130 | 8,962 | 6,696 | 5,283 | 4,626 | 4,299 | 3,634 | 5,094 |
| 1996 | 91,129 | 2,177 | 7,543 | 9,634 | 10,663 | 11,202 | 10,361 | 9,065 | 7,217 | 5,486 | 4,624 | 4,277 | 3,624 | 5,257 |
| 1997 | 92,179 | 2,255 | 7,589 | 9,533 | 10,363 | 11,220 | 10,614 | 9,203 | 7,566 | 5,803 | 4,750 | 4,246 | 3,647 | 5,391 |
| 1998 | 93,254 | 2,387 | 7,707 | 9,374 | 10,099 | 11,264 | 10,777 | 9,444 | 7,900 | 6,056 | 4,875 | 4,201 | 3,652 | 5,519 |
| 1999 | 94,341 | 2,503 | 7,860 | 9,175 | 9,945 | 11,196 | 10,940 | 9,712 | 8,298 | 6,292 | 4,934 | 4,211 | 3,630 | 5,645 |
| 2000 | 95,415 | 2,510 | 8,100 | 8,906 | 9,942 | 11,032 | 11,081 | 9,968 | 8,704 | 6,491 | 5,063 | 4,211 | 3,647 | 5,760 |
| 2001 | 96,416 | 2,438 | 8,323 | 8,776 | 9,918 | 10,782 | 11,180 | 10,215 | 8,863 | 6,864 | 5,300 | 4,247 | 3,639 | 5,872 |
| 2002 | 97,447 | 2,394 | 8,494 | 8,762 | 9,871 | 10,532 | 11,221 | 10,466 | 9,037 | 7,231 | 5,515 | 4,310 | 3,624 | 5,990 |
| 2003 | 98,418 | 2,333 | 8,588 | 8,866 | 9,711 | 10,300 | 11,239 | 10,664 | 9,243 | 7,609 | 5,731 | 4,430 | 3,598 | 6,108 |
| 2004 | 99,400 | 2,302 | 8,569 | 9,062 | 9,478 | 10,162 | 11,197 | 10,827 | 9,492 | 8,013 | 5,967 | 4,541 | 3,618 | 6,172 |
| <i>Female</i> | | | | | | | | | | | | | | |
| 1970 | 45,470 | 1,402 | 6,409 | 5,597 | 4,295 | 3,789 | 4,005 | 4,262 | 3,874 | 3,231 | 2,781 | 2,237 | 1,626 | 1,961 |
| 1975 | 53,916 | 2,094 | 7,562 | 7,827 | 5,563 | 4,302 | 3,871 | 4,063 | 4,192 | 3,714 | 3,246 | 2,801 | 1,991 | 2,691 |
| 1980 | 63,837 | 2,858 | 8,931 | 9,072 | 7,889 | 5,666 | 4,452 | 3,963 | 4,065 | 4,057 | 3,676 | 3,221 | 2,468 | 3,521 |
| 1985 | 70,249 | 1,976 | 8,328 | 9,901 | 9,066 | 7,881 | 5,751 | 4,530 | 3,970 | 3,971 | 3,995 | 3,546 | 2,848 | 4,485 |
| 1990 | 77,528 | 2,237 | 7,795 | 9,739 | 10,048 | 9,137 | 8,015 | 5,829 | 4,533 | 3,903 | 3,981 | 3,824 | 3,099 | 5,389 |
| 1991 | 78,624 | 2,023 | 7,824 | 9,496 | 10,154 | 9,387 | 8,212 | 6,335 | 4,764 | 3,935 | 3,926 | 3,803 | 3,200 | 5,565 |
| 1992 | 79,553 | 1,883 | 7,673 | 9,225 | 10,171 | 9,632 | 8,417 | 6,725 | 5,081 | 4,041 | 3,848 | 3,825 | 3,275 | 5,758 |
| 1993 | 80,658 | 1,786 | 7,524 | 9,002 | 10,176 | 9,822 | 8,685 | 7,117 | 5,360 | 4,188 | 3,874 | 3,872 | 3,319 | 5,933 |
| 1994 | 81,604 | 1,791 | 7,287 | 8,860 | 10,112 | 9,990 | 8,947 | 7,560 | 5,618 | 4,302 | 3,823 | 3,834 | 3,398 | 6,080 |
| 1995 | 82,941 | 1,905 | 7,130 | 8,916 | 9,921 | 10,138 | 9,218 | 8,059 | 5,812 | 4,454 | 3,871 | 3,824 | 3,437 | 6,257 |
| 1996 | 84,229 | 2,048 | 7,040 | 8,921 | 9,695 | 10,238 | 9,449 | 8,245 | 6,315 | 4,679 | 3,909 | 3,809 | 3,427 | 6,455 |
| 1997 | 85,638 | 2,122 | 7,136 | 8,899 | 9,460 | 10,278 | 9,703 | 8,440 | 6,695 | 4,989 | 4,065 | 3,787 | 3,445 | 6,619 |
| 1998 | 87,086 | 2,254 | 7,312 | 8,795 | 9,272 | 10,332 | 9,889 | 8,702 | 7,076 | 5,266 | 4,209 | 3,761 | 3,451 | 6,770 |
| 1999 | 88,562 | 2,356 | 7,539 | 8,668 | 9,178 | 10,293 | 10,081 | 8,971 | 7,514 | 5,516 | 4,316 | 3,804 | 3,414 | 6,912 |

(Continued)

**Table 4.C2—Estimated number, insured status, sex, and age, December 31, 1970–2004, selected years
(in thousands)—Continued**

| Year | Total, all ages | Under 20 | 20–24 | 25–29 | 30–34 | 35–39 | 40–44 | 45–49 | 50–54 | 55–59 | 60–64 | 65–69 | 70–74 | 75 or older |
|--|--------------------|----------|--------|--------|--------|--------|--------|--------|--------|--------|-------|-------|-------|----------------|
| 2000 | 89,947 | 2,399 | 7,767 | 8,466 | 9,239 | 10,140 | 10,251 | 9,240 | 7,963 | 5,734 | 4,480 | 3,833 | 3,399 | 7,035 |
| 2001 | 91,252 | 2,350 | 7,983 | 8,392 | 9,264 | 9,924 | 10,372 | 9,506 | 8,201 | 6,121 | 4,725 | 3,898 | 3,372 | 7,144 |
| 2002 | 92,107 | 2,221 | 7,951 | 8,310 | 9,265 | 9,707 | 10,434 | 9,754 | 8,411 | 6,516 | 4,954 | 3,978 | 3,357 | 7,250 |
| 2003 | 93,330 | 2,192 | 8,025 | 8,409 | 9,169 | 9,520 | 10,471 | 9,953 | 8,651 | 6,918 | 5,208 | 4,116 | 3,334 | 7,363 |
| 2004 | 94,552 | 2,174 | 8,024 | 8,590 | 9,002 | 9,428 | 10,443 | 10,148 | 8,928 | 7,345 | 5,433 | 4,255 | 3,376 | 7,407 |
| Insured for disability benefits | | | | | | | | | | | | | | |
| <i>Total</i> | | | | | | | | | | | | | | |
| 1970 | 74,504 | 3,860 | 12,432 | 9,858 | 7,257 | 6,743 | 7,399 | 7,817 | 7,250 | 6,486 | 5,401 | ... | ... | ... |
| 1975 | 85,305 | 4,948 | 14,144 | 13,289 | 9,313 | 7,610 | 7,271 | 7,762 | 7,892 | 7,035 | 6,041 | ... | ... | ... |
| 1980 | 100,329 | 6,341 | 17,410 | 16,104 | 12,997 | 9,788 | 8,267 | 7,628 | 7,888 | 7,669 | 6,238 | ... | ... | ... |
| 1985 | 109,572 | 4,105 | 15,868 | 17,976 | 15,851 | 13,683 | 10,661 | 8,747 | 7,780 | 7,763 | 7,138 | ... | ... | ... |
| 1990 | 120,081 | 4,541 | 15,023 | 17,954 | 17,691 | 16,099 | 14,339 | 10,991 | 8,759 | 7,569 | 7,116 | ... | ... | ... |
| 1991 | 121,530 | 4,047 | 14,788 | 17,620 | 17,946 | 16,653 | 14,890 | 11,743 | 9,075 | 7,700 | 7,070 | ... | ... | ... |
| 1992 | 122,883 | 3,655 | 14,295 | 17,188 | 18,204 | 17,178 | 15,203 | 12,610 | 9,683 | 7,823 | 7,045 | ... | ... | ... |
| 1993 | 124,430 | 3,461 | 13,945 | 16,758 | 18,341 | 17,646 | 15,672 | 13,262 | 10,261 | 8,093 | 6,991 | ... | ... | ... |
| 1994 | 126,205 | 3,514 | 13,639 | 16,433 | 18,358 | 17,957 | 16,234 | 14,029 | 10,724 | 8,310 | 7,009 | ... | ... | ... |
| 1995 | 128,233 | 3,763 | 13,374 | 16,409 | 18,068 | 18,291 | 16,787 | 14,823 | 11,095 | 8,571 | 7,051 | ... | ... | ... |
| 1996 | 130,315 | 4,021 | 13,206 | 16,440 | 17,665 | 18,507 | 17,278 | 15,328 | 11,839 | 8,889 | 7,142 | ... | ... | ... |
| 1997 | 132,354 | 4,173 | 13,408 | 16,307 | 17,224 | 18,635 | 17,699 | 15,553 | 12,664 | 9,451 | 7,242 | ... | ... | ... |
| 1998 | 134,654 | 4,439 | 13,712 | 16,151 | 16,840 | 18,717 | 18,082 | 15,964 | 13,288 | 10,000 | 7,462 | ... | ... | ... |
| 1999 | 137,081 | 4,667 | 14,089 | 15,905 | 16,638 | 18,729 | 18,383 | 16,525 | 14,025 | 10,437 | 7,683 | ... | ... | ... |
| 2000 | 139,304 | 4,711 | 14,554 | 15,511 | 16,704 | 18,480 | 18,745 | 17,065 | 14,829 | 10,775 | 7,930 | ... | ... | ... |
| 2001 | 141,004 | 4,565 | 14,806 | 15,231 | 16,783 | 18,115 | 18,946 | 17,567 | 15,313 | 11,466 | 8,211 | ... | ... | ... |
| 2002 | 142,557 | 4,393 | 14,920 | 15,220 | 16,759 | 17,738 | 19,066 | 18,038 | 15,593 | 12,153 | 8,677 | ... | ... | ... |
| 2003 | 144,621 | 4,309 | 15,105 | 15,443 | 16,586 | 17,411 | 19,131 | 18,404 | 16,054 | 12,834 | 9,093 | 251 | ... | ... |
| 2004 | 146,700 | 4,270 | 15,137 | 15,818 | 16,292 | 17,235 | 19,071 | 18,714 | 16,573 | 13,581 | 9,490 | 518 | ... | ... |
| <i>Male</i> | | | | | | | | | | | | | | |
| 1970 | 49,847 | 2,550 | 7,622 | 6,519 | 5,331 | 4,956 | 5,191 | 5,218 | 4,722 | 4,224 | 3,512 | ... | ... | ... |
| 1975 | 54,323 | 3,004 | 8,274 | 8,191 | 6,400 | 5,320 | 4,911 | 5,037 | 4,977 | 4,389 | 3,822 | ... | ... | ... |
| 1980 | 60,140 | 3,586 | 9,607 | 9,218 | 8,068 | 6,348 | 5,238 | 4,733 | 4,833 | 4,672 | 3,837 | ... | ... | ... |
| 1985 | 62,896 | 2,219 | 8,650 | 9,952 | 9,169 | 8,105 | 6,319 | 5,124 | 4,561 | 4,570 | 4,227 | ... | ... | ... |
| 1990 | 66,898 | 2,424 | 8,039 | 9,749 | 9,909 | 9,157 | 8,070 | 6,175 | 4,941 | 4,319 | 4,116 | ... | ... | ... |
| 1991 | 67,380 | 2,145 | 7,907 | 9,549 | 9,985 | 9,435 | 8,309 | 6,553 | 5,064 | 4,380 | 4,052 | ... | ... | ... |
| 1992 | 67,837 | 1,906 | 7,644 | 9,296 | 10,095 | 9,691 | 8,432 | 6,982 | 5,363 | 4,425 | 4,003 | ... | ... | ... |
| 1993 | 68,435 | 1,806 | 7,426 | 9,042 | 10,177 | 9,892 | 8,650 | 7,287 | 5,665 | 4,532 | 3,959 | ... | ... | ... |
| 1994 | 69,150 | 1,829 | 7,263 | 8,824 | 10,156 | 10,028 | 8,944 | 7,651 | 5,878 | 4,632 | 3,946 | ... | ... | ... |
| 1995 | 69,979 | 1,957 | 7,079 | 8,774 | 9,971 | 10,186 | 9,244 | 8,020 | 6,054 | 4,737 | 3,957 | ... | ... | ... |
| 1996 | 70,815 | 2,068 | 6,948 | 8,747 | 9,720 | 10,272 | 9,509 | 8,252 | 6,435 | 4,863 | 4,003 | ... | ... | ... |
| 1997 | 71,659 | 2,146 | 6,996 | 8,656 | 9,444 | 10,303 | 9,724 | 8,343 | 6,848 | 5,152 | 4,047 | ... | ... | ... |
| 1998 | 72,611 | 2,279 | 7,117 | 8,516 | 9,186 | 10,342 | 9,892 | 8,549 | 7,149 | 5,444 | 4,138 | ... | ... | ... |
| 1999 | 73,646 | 2,401 | 7,275 | 8,349 | 9,006 | 10,321 | 10,031 | 8,846 | 7,503 | 5,660 | 4,254 | ... | ... | ... |
| 2000 | 74,581 | 2,403 | 7,501 | 8,099 | 8,996 | 10,146 | 10,215 | 9,153 | 7,881 | 5,832 | 4,355 | ... | ... | ... |
| 2001 | 75,238 | 2,319 | 7,605 | 7,936 | 8,983 | 9,926 | 10,290 | 9,415 | 8,105 | 6,182 | 4,478 | ... | ... | ... |
| 2002 | 76,077 | 2,286 | 7,759 | 7,963 | 8,950 | 9,699 | 10,323 | 9,646 | 8,225 | 6,510 | 4,716 | ... | ... | ... |
| 2003 | 76,874 | 2,227 | 7,863 | 8,072 | 8,814 | 9,463 | 10,308 | 9,806 | 8,432 | 6,850 | 4,903 | 137 | ... | ... |
| 2004 | 77,719 | 2,200 | 7,875 | 8,263 | 8,622 | 9,316 | 10,230 | 9,929 | 8,687 | 7,212 | 5,104 | 280 | ... | ... |
| <i>Female</i> | | | | | | | | | | | | | | |
| 1970 | 24,656 | 1,310 | 4,810 | 3,339 | 1,926 | 1,787 | 2,208 | 2,599 | 2,527 | 2,262 | 1,889 | ... | ... | ... |
| 1975 | 30,982 | 1,945 | 5,870 | 5,098 | 2,913 | 2,290 | 2,360 | 2,726 | 2,915 | 2,646 | 2,219 | ... | ... | ... |
| 1980 | 40,189 | 2,755 | 7,804 | 6,886 | 4,929 | 3,441 | 3,028 | 2,894 | 3,055 | 2,997 | 2,401 | ... | ... | ... |
| 1985 | 46,676 | 1,886 | 7,218 | 8,025 | 6,682 | 5,578 | 4,342 | 3,622 | 3,219 | 3,193 | 2,911 | ... | ... | ... |
| 1990 | 53,183 | 2,116 | 6,984 | 8,206 | 7,782 | 6,942 | 6,269 | 4,816 | 3,818 | 3,250 | 3,000 | ... | ... | ... |
| 1991 | 54,150 | 1,902 | 6,881 | 8,071 | 7,960 | 7,217 | 6,581 | 5,190 | 4,010 | 3,320 | 3,019 | ... | ... | ... |
| 1992 | 55,046 | 1,749 | 6,652 | 7,892 | 8,109 | 7,487 | 6,771 | 5,628 | 4,319 | 3,398 | 3,041 | ... | ... | ... |
| 1993 | 55,995 | 1,656 | 6,519 | 7,715 | 8,165 | 7,754 | 7,022 | 5,974 | 4,597 | 3,561 | 3,033 | ... | ... | ... |
| 1994 | 57,055 | 1,685 | 6,376 | 7,609 | 8,202 | 7,929 | 7,289 | 6,378 | 4,845 | 3,678 | 3,063 | ... | ... | ... |
| 1995 | 58,254 | 1,806 | 6,295 | 7,635 | 8,097 | 8,105 | 7,544 | 6,803 | 5,042 | 3,834 | 3,094 | ... | ... | ... |
| 1996 | 59,500 | 1,953 | 6,258 | 7,693 | 7,946 | 8,234 | 7,769 | 7,077 | 5,404 | 4,026 | 3,139 | ... | ... | ... |
| 1997 | 60,696 | 2,026 | 6,412 | 7,651 | 7,780 | 8,332 | 7,975 | 7,210 | 5,816 | 4,298 | 3,196 | ... | ... | ... |
| 1998 | 62,043 | 2,161 | 6,595 | 7,635 | 7,654 | 8,376 | 8,190 | 7,415 | 6,139 | 4,555 | 3,324 | ... | ... | ... |
| 1999 | 63,435 | 2,266 | 6,813 | 7,556 | 7,633 | 8,408 | 8,351 | 7,679 | 6,523 | 4,777 | 3,429 | ... | ... | ... |

(Continued)

4.C OASDI: Insured Workers

**Table 4.C2—Estimated number, insured status, sex, and age, December 31, 1970–2004, selected years
(in thousands)—Continued**

| Year | Total, all ages | Under 20 | 20–24 | 25–29 | 30–34 | 35–39 | 40–44 | 45–49 | 50–54 | 55–59 | 60–64 | 65–69 | 70–74 | 75 or older |
|------|--------------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|----------------|
| 2000 | 64,724 | 2,308 | 7,053 | 7,412 | 7,709 | 8,335 | 8,530 | 7,911 | 6,949 | 4,943 | 3,575 | ... | ... | ... |
| 2001 | 65,766 | 2,247 | 7,201 | 7,296 | 7,801 | 8,189 | 8,656 | 8,152 | 7,208 | 5,285 | 3,733 | ... | ... | ... |
| 2002 | 66,480 | 2,107 | 7,161 | 7,256 | 7,809 | 8,039 | 8,743 | 8,392 | 7,368 | 5,643 | 3,962 | ... | ... | ... |
| 2003 | 67,747 | 2,083 | 7,242 | 7,371 | 7,771 | 7,947 | 8,824 | 8,599 | 7,621 | 5,985 | 4,190 | 115 | ... | ... |
| 2004 | 68,980 | 2,070 | 7,262 | 7,555 | 7,670 | 7,919 | 8,841 | 8,785 | 7,886 | 6,368 | 4,387 | 237 | ... | ... |

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

NOTES: Figures are subject to revision.

... = not applicable.

CONTACT: Jeff Kunkel (410) 965-3013.

Table 4.C5—Estimated size of the population in the Social Security area and percentage fully insured, by sex and age, 2000–2004 (in thousands)

| Age at end of year | 2000 | | 2001 | | 2002 | | 2003 | | 2004 | |
|--------------------|------------|--------------------------|------------|--------------------------|------------|--------------------------|------------|--------------------------|------------|--------------------------|
| | Population | Percentage fully insured | Population | Percentage fully insured | Population | Percentage fully insured | Population | Percentage fully insured | Population | Percentage fully insured |
| Total | | | | | | | | | | |
| Total | 289,812 | ^a 87 | 293,015 | ^a 87 | 295,645 | ^a 87 | 298,051 | ^a 87 | 300,654 | ^a 87 |
| Under 15 | 62,484 | ^b | 62,780 | ^b | 62,876 | ^b | 62,900 | ^b | 62,840 | ^b |
| 15–19 | 20,194 | 24 | 20,268 | 24 | 20,407 | 23 | 20,622 | 22 | 20,953 | 21 |
| 20–24 | 19,793 | 80 | 20,291 | 80 | 20,599 | 80 | 20,761 | 80 | 20,823 | 80 |
| 25–29 | 19,500 | 89 | 19,469 | 88 | 19,485 | 88 | 19,706 | 88 | 20,108 | 88 |
| 30–34 | 21,177 | 91 | 21,363 | 90 | 21,369 | 90 | 21,128 | 89 | 20,747 | 89 |
| 35–39 | 22,936 | 92 | 22,660 | 91 | 22,237 | 91 | 21,836 | 91 | 21,647 | 90 |
| 40–44 | 23,217 | 92 | 23,439 | 92 | 23,527 | 92 | 23,564 | 92 | 23,509 | 92 |
| 45–49 | 21,001 | 91 | 21,510 | 92 | 22,053 | 92 | 22,491 | 92 | 22,873 | 92 |
| 50–54 | 18,551 | 90 | 18,857 | 90 | 19,211 | 91 | 19,632 | 91 | 20,159 | 91 |
| 55–59 | 14,131 | 87 | 14,910 | 87 | 15,701 | 88 | 16,474 | 88 | 17,289 | 89 |
| 60–64 | 11,246 | 85 | 11,621 | 86 | 12,147 | 86 | 12,669 | 86 | 13,140 | 87 |
| 65–69 | 9,658 | 83 | 9,705 | 84 | 9,817 | 84 | 10,006 | 85 | 10,230 | 86 |
| 70–74 | 8,898 | 79 | 8,838 | 79 | 8,757 | 80 | 8,677 | 80 | 8,636 | 81 |
| 75 or older | 17,027 | 75 | 17,305 | 75 | 17,458 | 76 | 17,585 | 77 | 17,698 | 77 |
| Male | | | | | | | | | | |
| Subtotal | 143,254 | ^a 92 | 144,910 | ^a 92 | 146,261 | ^a 92 | 147,516 | ^a 92 | 148,855 | ^a 92 |
| Under 15 | 31,927 | ^b | 32,072 | ^b | 32,123 | ^b | 32,136 | ^b | 32,105 | ^b |
| 15–19 | 10,393 | 24 | 10,427 | 23 | 10,461 | 23 | 10,544 | 22 | 10,706 | 22 |
| 20–24 | 10,204 | 79 | 10,467 | 80 | 10,642 | 80 | 10,733 | 80 | 10,752 | 80 |
| 25–29 | 9,974 | 89 | 9,976 | 88 | 9,989 | 88 | 10,112 | 88 | 10,323 | 88 |
| 30–34 | 10,786 | 92 | 10,886 | 91 | 10,887 | 91 | 10,760 | 90 | 10,559 | 90 |
| 35–39 | 11,605 | 95 | 11,478 | 94 | 11,271 | 93 | 11,081 | 93 | 10,989 | 92 |
| 40–44 | 11,650 | 95 | 11,763 | 95 | 11,814 | 95 | 11,838 | 95 | 11,821 | 95 |
| 45–49 | 10,454 | 95 | 10,711 | 95 | 10,988 | 95 | 11,214 | 95 | 11,409 | 95 |
| 50–54 | 9,170 | 95 | 9,316 | 95 | 9,490 | 95 | 9,699 | 95 | 9,964 | 95 |
| 55–59 | 6,912 | 94 | 7,302 | 94 | 7,691 | 94 | 8,072 | 94 | 8,473 | 95 |
| 60–64 | 5,414 | 94 | 5,595 | 95 | 5,850 | 94 | 6,108 | 94 | 6,342 | 94 |
| 65–69 | 4,514 | 93 | 4,542 | 93 | 4,606 | 94 | 4,707 | 94 | 4,820 | 94 |
| 70–74 | 3,962 | 92 | 3,947 | 92 | 3,927 | 92 | 3,905 | 92 | 3,901 | 93 |
| 75 or older | 6,289 | 92 | 6,426 | 91 | 6,521 | 92 | 6,607 | 92 | 6,689 | 92 |
| Female | | | | | | | | | | |
| Subtotal | 146,558 | ^a 82 | 148,105 | ^a 83 | 149,384 | ^a 83 | 150,535 | ^a 83 | 151,799 | ^a 83 |
| Under 15 | 30,557 | ^b | 30,708 | ^b | 30,754 | ^b | 30,764 | ^b | 30,736 | ^b |
| 15–19 | 9,800 | 24 | 9,840 | 24 | 9,946 | 22 | 10,078 | 22 | 10,247 | 21 |
| 20–24 | 9,589 | 81 | 9,823 | 81 | 9,957 | 80 | 10,028 | 80 | 10,071 | 80 |
| 25–29 | 9,526 | 89 | 9,492 | 88 | 9,495 | 88 | 9,594 | 88 | 9,785 | 88 |
| 30–34 | 10,391 | 89 | 10,478 | 88 | 10,482 | 88 | 10,369 | 88 | 10,188 | 88 |
| 35–39 | 11,331 | 89 | 11,182 | 89 | 10,966 | 89 | 10,756 | 89 | 10,658 | 88 |
| 40–44 | 11,567 | 89 | 11,676 | 89 | 11,714 | 89 | 11,726 | 89 | 11,688 | 89 |
| 45–49 | 10,546 | 88 | 10,799 | 88 | 11,066 | 88 | 11,277 | 88 | 11,464 | 89 |
| 50–54 | 9,381 | 85 | 9,541 | 86 | 9,721 | 87 | 9,933 | 87 | 10,195 | 88 |
| 55–59 | 7,219 | 79 | 7,608 | 80 | 8,010 | 81 | 8,402 | 82 | 8,817 | 83 |
| 60–64 | 5,832 | 77 | 6,026 | 78 | 6,296 | 79 | 6,561 | 79 | 6,798 | 80 |
| 65–69 | 5,144 | 75 | 5,163 | 75 | 5,210 | 76 | 5,299 | 78 | 5,409 | 79 |
| 70–74 | 4,935 | 69 | 4,890 | 69 | 4,830 | 70 | 4,772 | 70 | 4,734 | 71 |
| 75 or older | 10,738 | 66 | 10,879 | 66 | 10,937 | 66 | 10,977 | 67 | 11,009 | 67 |

SOURCE: U.S. Census Bureau.

NOTES: Population in the Social Security area includes residents of the 50 states and the District of Columbia adjusted for net census undercount; civilian residents of 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.

a. Percentage of population aged 20 or older and fully insured.

b. Less than 0.5 percent.

CONTACT: Felicitie Bell (410) 965-3020 or Michael Miller (410) 965-7776.

4.C OASDI: Insured Workers

Table 4.C6—Revised period life table, 2000

| Exact age | Male | | | Female | | | Exact age | Male | | | Female | | |
|-----------|--------------------------------|------------------------------|-----------------|--------------------------------|------------------------------|-----------------|-----------|--------------------------------|------------------------------|-----------------|--------------------------------|------------------------------|-----------------|
| | Death probability ^a | Number of lives ^b | Life expectancy | Death probability ^a | Number of lives ^b | Life expectancy | | Death probability ^a | Number of lives ^b | Life expectancy | Death probability ^a | Number of lives ^b | Life expectancy |
| 0 | 0.007589 | 100,000 | 73.98 | 0.006234 | 100,000 | 79.35 | 60 | 0.012547 | 84,682 | 19.49 | 0.007888 | 90,867 | 22.92 |
| 1 | 0.000543 | 99,241 | 73.54 | 0.000447 | 99,377 | 78.84 | 61 | 0.013673 | 83,620 | 18.73 | 0.008647 | 90,151 | 22.10 |
| 2 | 0.000376 | 99,187 | 72.58 | 0.000301 | 99,332 | 77.88 | 62 | 0.015020 | 82,476 | 17.99 | 0.009542 | 89,371 | 21.29 |
| 3 | 0.000283 | 99,150 | 71.61 | 0.000198 | 99,302 | 76.90 | 63 | 0.016636 | 81,237 | 17.25 | 0.010598 | 88,518 | 20.49 |
| 4 | 0.000218 | 99,122 | 70.63 | 0.000188 | 99,283 | 75.92 | 64 | 0.018482 | 79,886 | 16.54 | 0.011795 | 87,580 | 19.70 |
| 5 | 0.000199 | 99,100 | 69.64 | 0.000165 | 99,264 | 74.93 | 65 | 0.020548 | 78,410 | 15.84 | 0.013148 | 86,547 | 18.93 |
| 6 | 0.000191 | 99,081 | 68.66 | 0.000150 | 99,248 | 73.94 | 66 | 0.022728 | 76,798 | 15.16 | 0.014574 | 85,409 | 18.18 |
| 7 | 0.000183 | 99,062 | 67.67 | 0.000139 | 99,233 | 72.95 | 67 | 0.024913 | 75,053 | 14.50 | 0.015965 | 84,164 | 17.44 |
| 8 | 0.000166 | 99,043 | 66.68 | 0.000129 | 99,219 | 71.96 | 68 | 0.027044 | 73,183 | 13.86 | 0.017267 | 82,821 | 16.71 |
| 9 | 0.000144 | 99,027 | 65.69 | 0.000120 | 99,206 | 70.97 | 69 | 0.029211 | 71,204 | 13.23 | 0.018565 | 81,391 | 16.00 |
| 10 | 0.000126 | 99,013 | 64.70 | 0.000115 | 99,194 | 69.98 | 70 | 0.031632 | 69,124 | 12.61 | 0.020038 | 79,880 | 15.29 |
| 11 | 0.000133 | 99,000 | 63.71 | 0.000120 | 99,183 | 68.99 | 71 | 0.034378 | 66,937 | 12.01 | 0.021767 | 78,279 | 14.59 |
| 12 | 0.000189 | 98,987 | 62.72 | 0.000142 | 99,171 | 68.00 | 72 | 0.037344 | 64,636 | 11.42 | 0.023691 | 76,575 | 13.91 |
| 13 | 0.000305 | 98,968 | 61.73 | 0.000184 | 99,157 | 67.01 | 73 | 0.040545 | 62,223 | 10.84 | 0.025838 | 74,761 | 13.23 |
| 14 | 0.000466 | 98,938 | 60.75 | 0.000241 | 99,139 | 66.02 | 74 | 0.044058 | 59,700 | 10.28 | 0.028258 | 72,829 | 12.57 |
| 15 | 0.000642 | 98,892 | 59.78 | 0.000305 | 99,115 | 65.04 | 75 | 0.048038 | 57,069 | 9.73 | 0.031076 | 70,771 | 11.92 |
| 16 | 0.000808 | 98,829 | 58.81 | 0.000366 | 99,084 | 64.06 | 76 | 0.052535 | 54,328 | 9.20 | 0.034298 | 68,572 | 11.29 |
| 17 | 0.000957 | 98,749 | 57.86 | 0.000412 | 99,048 | 63.08 | 77 | 0.057503 | 51,474 | 8.68 | 0.037847 | 66,220 | 10.67 |
| 18 | 0.001078 | 98,654 | 56.92 | 0.000436 | 99,007 | 62.10 | 78 | 0.062971 | 48,514 | 8.18 | 0.041727 | 63,714 | 10.07 |
| 19 | 0.001174 | 98,548 | 55.98 | 0.000444 | 98,964 | 61.13 | 79 | 0.069030 | 45,459 | 7.69 | 0.046048 | 61,055 | 9.49 |
| 20 | 0.001271 | 98,432 | 55.04 | 0.000450 | 98,920 | 60.16 | 80 | 0.075763 | 42,321 | 7.23 | 0.051019 | 58,244 | 8.92 |
| 21 | 0.001363 | 98,307 | 54.11 | 0.000460 | 98,876 | 59.19 | 81 | 0.083294 | 39,115 | 6.78 | 0.056721 | 55,272 | 8.37 |
| 22 | 0.001415 | 98,173 | 53.19 | 0.000468 | 98,830 | 58.21 | 82 | 0.091719 | 35,857 | 6.35 | 0.063095 | 52,137 | 7.85 |
| 23 | 0.001415 | 98,034 | 52.26 | 0.000475 | 98,784 | 57.24 | 83 | 0.101116 | 32,568 | 5.94 | 0.070179 | 48,848 | 7.34 |
| 24 | 0.001380 | 97,896 | 51.33 | 0.000484 | 98,737 | 56.27 | 84 | 0.111477 | 29,275 | 5.55 | 0.078074 | 45,420 | 6.86 |
| 25 | 0.001330 | 97,760 | 50.40 | 0.000492 | 98,689 | 55.29 | 85 | 0.122763 | 26,011 | 5.18 | 0.086900 | 41,873 | 6.39 |
| 26 | 0.001291 | 97,630 | 49.47 | 0.000504 | 98,641 | 54.32 | 86 | 0.134943 | 22,818 | 4.84 | 0.096760 | 38,235 | 5.96 |
| 27 | 0.001269 | 97,504 | 48.53 | 0.000523 | 98,591 | 53.35 | 87 | 0.148004 | 19,739 | 4.52 | 0.107728 | 34,535 | 5.54 |
| 28 | 0.001275 | 97,381 | 47.59 | 0.000549 | 98,539 | 52.38 | 88 | 0.161948 | 16,817 | 4.21 | 0.119852 | 30,815 | 5.15 |
| 29 | 0.001306 | 97,256 | 46.65 | 0.000584 | 98,485 | 51.40 | 89 | 0.176798 | 14,094 | 3.93 | 0.133149 | 27,121 | 4.78 |
| 30 | 0.001346 | 97,129 | 45.72 | 0.000624 | 98,428 | 50.43 | 90 | 0.192573 | 11,602 | 3.67 | 0.147622 | 23,510 | 4.44 |
| 31 | 0.001391 | 96,999 | 44.78 | 0.000670 | 98,366 | 49.46 | 91 | 0.209287 | 9,368 | 3.42 | 0.163263 | 20,040 | 4.12 |
| 32 | 0.001455 | 96,864 | 43.84 | 0.000724 | 98,301 | 48.50 | 92 | 0.226948 | 7,407 | 3.20 | 0.180052 | 16,768 | 3.83 |
| 33 | 0.001538 | 96,723 | 42.90 | 0.000788 | 98,229 | 47.53 | 93 | 0.245551 | 5,726 | 2.99 | 0.197963 | 13,749 | 3.56 |
| 34 | 0.001641 | 96,574 | 41.97 | 0.000862 | 98,152 | 46.57 | 94 | 0.265081 | 4,320 | 2.80 | 0.216961 | 11,027 | 3.31 |
| 35 | 0.001761 | 96,416 | 41.03 | 0.000943 | 98,067 | 45.61 | 95 | 0.284598 | 3,175 | 2.63 | 0.236221 | 8,635 | 3.09 |
| 36 | 0.001895 | 96,246 | 40.11 | 0.001031 | 97,975 | 44.65 | 96 | 0.303872 | 2,271 | 2.47 | 0.255493 | 6,595 | 2.89 |
| 37 | 0.002044 | 96,063 | 39.18 | 0.001127 | 97,874 | 43.70 | 97 | 0.322655 | 1,581 | 2.34 | 0.274498 | 4,910 | 2.71 |
| 38 | 0.002207 | 95,867 | 38.26 | 0.001231 | 97,764 | 42.75 | 98 | 0.340694 | 1,071 | 2.21 | 0.292942 | 3,562 | 2.55 |
| 39 | 0.002385 | 95,656 | 37.34 | 0.001342 | 97,643 | 41.80 | 99 | 0.357729 | 706 | 2.10 | 0.310519 | 2,519 | 2.40 |
| 40 | 0.002578 | 95,427 | 36.43 | 0.001465 | 97,512 | 40.85 | 100 | 0.375615 | 454 | 1.98 | 0.329150 | 1,737 | 2.26 |
| 41 | 0.002789 | 95,181 | 35.52 | 0.001597 | 97,369 | 39.91 | 101 | 0.394396 | 283 | 1.88 | 0.348899 | 1,165 | 2.12 |
| 42 | 0.003025 | 94,916 | 34.62 | 0.001730 | 97,214 | 38.98 | 102 | 0.414116 | 171 | 1.78 | 0.369833 | 759 | 1.99 |
| 43 | 0.003289 | 94,629 | 33.73 | 0.001861 | 97,046 | 38.04 | 103 | 0.434821 | 100 | 1.68 | 0.392023 | 478 | 1.87 |
| 44 | 0.003577 | 94,318 | 32.84 | 0.001995 | 96,865 | 37.11 | 104 | 0.456562 | 57 | 1.58 | 0.415544 | 291 | 1.75 |
| 45 | 0.003902 | 93,980 | 31.95 | 0.002145 | 96,672 | 36.19 | 105 | 0.479391 | 31 | 1.49 | 0.440477 | 170 | 1.63 |
| 46 | 0.004244 | 93,613 | 31.08 | 0.002315 | 96,464 | 35.26 | 106 | 0.503360 | 16 | 1.40 | 0.466905 | 95 | 1.52 |
| 47 | 0.004568 | 93,216 | 30.21 | 0.002498 | 96,241 | 34.34 | 107 | 0.528528 | 8 | 1.32 | 0.494920 | 51 | 1.42 |
| 48 | 0.004859 | 92,790 | 29.34 | 0.002693 | 96,001 | 33.43 | 108 | 0.554954 | 4 | 1.24 | 0.524615 | 26 | 1.32 |
| 49 | 0.005142 | 92,339 | 28.48 | 0.002908 | 95,742 | 32.52 | 109 | 0.582702 | 2 | 1.16 | 0.556092 | 12 | 1.23 |

(Continued)

Table 4.C6—Revised period life table, 2000—Continued

| Exact age | Male | | | Female | | | Exact age | Male | | | Female | | |
|-----------|--------------------------------|------------------------------|-----------------|--------------------------------|------------------------------|-----------------|-----------|--------------------------------|------------------------------|-----------------|--------------------------------|------------------------------|-----------------|
| | Death probability ^a | Number of lives ^b | Life expectancy | Death probability ^a | Number of lives ^b | Life expectancy | | Death probability ^a | Number of lives ^b | Life expectancy | Death probability ^a | Number of lives ^b | Life expectancy |
| 50 | 0.005450 | 91,865 | 27.63 | 0.003149 | 95,464 | 31.61 | 110 | 0.611837 | 1 | 1.09 | 0.589457 | 5 | 1.14 |
| 51 | 0.005821 | 91,364 | 26.78 | 0.003424 | 95,163 | 30.71 | 111 | 0.642429 | 0 | 1.02 | 0.624824 | 2 | 1.05 |
| 52 | 0.006270 | 90,832 | 25.93 | 0.003739 | 94,837 | 29.81 | 112 | 0.674551 | 0 | 0.95 | 0.662314 | 1 | 0.97 |
| 53 | 0.006817 | 90,263 | 25.09 | 0.004099 | 94,483 | 28.92 | 113 | 0.708278 | 0 | 0.89 | 0.702053 | 0 | 0.89 |
| 54 | 0.007457 | 89,647 | 24.26 | 0.004505 | 94,095 | 28.04 | 114 | 0.743692 | 0 | 0.82 | 0.743692 | 0 | 0.82 |
| 55 | 0.008191 | 88,979 | 23.44 | 0.004969 | 93,672 | 27.16 | 115 | 0.780876 | 0 | 0.76 | 0.780876 | 0 | 0.76 |
| 56 | 0.008991 | 88,250 | 22.63 | 0.005482 | 93,206 | 26.30 | 116 | 0.819920 | 0 | 0.71 | 0.819920 | 0 | 0.71 |
| 57 | 0.009823 | 87,457 | 21.83 | 0.006028 | 92,695 | 25.44 | 117 | 0.860916 | 0 | 0.65 | 0.860916 | 0 | 0.65 |
| 58 | 0.010671 | 86,597 | 21.04 | 0.006601 | 92,136 | 24.59 | 118 | 0.903962 | 0 | 0.60 | 0.903962 | 0 | 0.60 |
| 59 | 0.011571 | 85,673 | 20.26 | 0.007220 | 91,528 | 23.75 | 119 | 0.949160 | 0 | 0.55 | 0.949160 | 0 | 0.55 |

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

NOTE: Revised to reflect additional data from the National Center for Health Statistics and from the Census Bureau.

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

CONTACT: Felicitie Bell (410) 965-3020 or Michael Miller (410) 965-7776.

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

Benefits in Current-Payment Status

| | |
|--|-------|
| Summary | 5.1 |
| Retired Workers | 5.33 |
| Retired Workers and Dependents | 5.47 |
| Disabled Workers | 5.50 |
| Disabled Workers and Dependents | 5.55 |
| Dependents and Survivors | 5.57 |
| Retired Workers with Dual Entitlement | 5.69 |
| Beneficiary Families | 5.75 |
| Geographic Data | 5.82 |
| Direct Deposit | 5.105 |
| With Representative Payee | 5.106 |
| International Agreements | 5.107 |

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1—Number and average monthly benefit, by type of benefit and race, December 2003

| Type of benefit | All races ^a | | White | | Black | | Other ^b | |
|------------------------------|------------------------|-----------------------------------|------------|-----------------------------------|-----------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| Total, OASDI ^d | 47,053,140 | 840.60 | 39,644,330 | 868.70 | 4,836,700 | 705.40 | 2,429,420 | 657.20 |
| OASI | 39,454,870 | 863.40 | 34,275,910 | 886.20 | 3,499,300 | 725.40 | 1,580,630 | 677.80 |
| Retirement benefits | 32,650,150 | 878.30 | 28,858,030 | 895.40 | 2,626,430 | 767.90 | 1,094,680 | 695.10 |
| Retired workers | 29,547,530 | 922.10 | 26,128,930 | 939.40 | 2,405,850 | 802.60 | 949,530 | 752.10 |
| Spouses of retired workers | 2,622,130 | 463.60 | 2,378,990 | 474.50 | 123,750 | 383.80 | 112,400 | 323.90 |
| Children of retired workers | 480,490 | 445.50 | 350,110 | 471.70 | 96,830 | 395.40 | 32,750 | 316.30 |
| Survivor benefits | 6,804,720 | 792.00 | 5,417,880 | 837.40 | 872,870 | 597.70 | 485,950 | 638.90 |
| Children of deceased workers | 1,906,680 | 602.70 | 1,234,420 | 650.50 | 418,120 | 505.20 | 240,480 | 527.80 |
| Widowed mothers and fathers | 188,320 | 659.70 | 128,940 | 706.50 | 28,640 | 565.90 | 29,260 | 548.60 |
| Nondisabled widow(er)s | 4,499,900 | 888.30 | 3,909,940 | 910.20 | 386,790 | 709.70 | 190,980 | 800.90 |
| Disabled widow(er)s | 207,630 | 562.30 | 143,390 | 577.80 | 39,080 | 499.70 | 24,520 | 571.60 |
| Parents of deceased workers | 2,190 | 803.10 | 1,190 | 830.40 | 240 | 827.50 | 710 | 761.20 |
| DI | 7,598,270 | 722.50 | 5,368,420 | 756.50 | 1,337,400 | 652.90 | 848,790 | 618.90 |
| Disabled workers | 5,867,460 | 861.70 | 4,220,300 | 890.40 | 991,810 | 800.20 | 620,870 | 767.50 |
| Spouses of disabled workers | 151,500 | 219.90 | 113,830 | 230.40 | 18,490 | 196.80 | 18,660 | 179.50 |
| Children of disabled workers | 1,579,310 | 253.90 | 1,034,290 | 268.20 | 327,100 | 232.00 | 209,260 | 217.10 |

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.

- a. Includes 142,690 persons of unknown race. In years prior to 1993, persons of unknown race were included with White.
- b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).
- d. Includes special age-72 beneficiaries.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.1—Number and average monthly benefit for retired workers, by sex, age, and race, December 2003

| Age | All races ^a | | White | | Black | | Other ^b | | |
|----------------------------|------------------------|-----------------------------------|------------|-----------------------------------|-----------|-----------------------------------|--------------------|-----------------------------------|--|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | |
| All retired workers | | | | | | | | | |
| Total | 29,547,530 | 922.10 | 26,128,930 | 939.40 | 2,405,850 | 802.60 | 949,530 | 752.10 | |
| 62–64 | 2,587,310 | 858.60 | 2,242,920 | 874.10 | 228,450 | 797.30 | 115,910 | 680.00 | |
| 62 | 708,390 | 847.60 | 613,470 | 862.70 | 59,700 | 796.90 | 35,220 | 670.80 | |
| 63 | 906,650 | 860.60 | 786,430 | 875.60 | 81,090 | 799.70 | 39,120 | 685.40 | |
| 64 | 972,270 | 864.80 | 843,020 | 881.00 | 87,660 | 795.40 | 41,570 | 682.70 | |
| 65–69 | 7,730,220 | 930.20 | 6,682,050 | 950.20 | 711,310 | 828.50 | 333,400 | 748.50 | |
| 65 | 1,584,580 | 957.10 | 1,369,020 | 976.80 | 142,200 | 859.30 | 72,900 | 779.10 | |
| 66 | 1,627,910 | 956.90 | 1,402,350 | 978.10 | 152,590 | 852.70 | 72,360 | 767.90 | |
| 67 | 1,554,330 | 923.30 | 1,342,830 | 943.00 | 142,140 | 826.90 | 68,750 | 737.90 | |
| 68 | 1,511,970 | 907.10 | 1,307,950 | 927.00 | 141,390 | 799.60 | 61,840 | 732.70 | |
| 69 | 1,451,430 | 902.40 | 1,259,900 | 921.90 | 132,990 | 800.00 | 57,550 | 714.80 | |
| 70–74 | 6,584,000 | 912.30 | 5,795,150 | 930.60 | 556,090 | 794.70 | 222,920 | 739.60 | |
| 70 | 1,361,470 | 910.20 | 1,183,020 | 929.70 | 123,070 | 799.10 | 54,280 | 740.90 | |
| 71 | 1,366,160 | 923.20 | 1,192,720 | 942.30 | 123,990 | 808.20 | 48,180 | 751.40 | |
| 72 | 1,322,130 | 912.60 | 1,169,000 | 930.90 | 107,440 | 792.30 | 43,680 | 728.80 | |
| 73 | 1,311,040 | 908.10 | 1,164,240 | 925.70 | 103,740 | 785.90 | 40,960 | 724.30 | |
| 74 | 1,223,200 | 906.80 | 1,086,170 | 923.50 | 97,850 | 784.00 | 35,820 | 752.30 | |
| 75–79 | 5,550,380 | 920.80 | 4,977,670 | 936.40 | 414,510 | 787.70 | 138,590 | 775.10 | |
| 75 | 1,209,750 | 919.00 | 1,079,470 | 935.00 | 93,280 | 793.80 | 33,280 | 773.80 | |
| 76 | 1,176,050 | 924.80 | 1,051,530 | 941.40 | 89,680 | 789.80 | 30,980 | 768.40 | |
| 77 | 1,101,850 | 917.00 | 989,700 | 931.70 | 81,720 | 788.60 | 26,200 | 772.00 | |
| 78 | 1,052,480 | 928.70 | 946,190 | 944.30 | 77,350 | 787.90 | 25,110 | 788.10 | |
| 79 | 1,010,250 | 914.30 | 910,780 | 929.10 | 72,480 | 776.00 | 23,020 | 775.20 | |
| 80–84 | 3,920,790 | 910.50 | 3,549,260 | 924.50 | 271,080 | 771.00 | 83,490 | 775.90 | |
| 80 | 927,550 | 908.10 | 838,590 | 922.10 | 63,750 | 772.40 | 21,750 | 774.00 | |
| 81 | 855,400 | 908.30 | 771,210 | 922.50 | 60,940 | 774.70 | 19,270 | 774.40 | |
| 82 | 816,430 | 907.20 | 741,880 | 921.20 | 54,670 | 761.30 | 16,480 | 772.10 | |
| 83 | 715,530 | 908.30 | 649,450 | 921.80 | 48,450 | 768.40 | 14,370 | 776.60 | |
| 84 | 605,880 | 924.40 | 548,130 | 938.90 | 43,270 | 778.70 | 11,620 | 786.20 | |
| 85–89 | 2,127,290 | 1,009.40 | 1,939,090 | 1,024.20 | 140,970 | 836.90 | 37,440 | 894.70 | |
| 85 | 561,040 | 965.40 | 512,060 | 979.50 | 36,460 | 807.60 | 9,950 | 824.50 | |
| 86 | 483,080 | 995.10 | 441,240 | 1,009.00 | 30,720 | 825.50 | 8,730 | 898.50 | |
| 87 | 415,940 | 1,054.30 | 378,340 | 1,070.40 | 29,010 | 872.00 | 6,820 | 944.00 | |
| 88 | 359,400 | 1,038.80 | 328,160 | 1,053.10 | 22,970 | 863.20 | 6,510 | 936.90 | |
| 89 | 307,830 | 1,017.40 | 279,290 | 1,034.00 | 21,810 | 827.60 | 5,430 | 904.40 | |
| 90–94 | 827,460 | 969.80 | 748,630 | 986.10 | 61,710 | 790.20 | 14,080 | 864.30 | |
| 95 or older | 220,080 | 890.90 | 194,160 | 912.40 | 21,730 | 707.90 | 3,700 | 813.80 | |
| Men | | | | | | | | | |
| Subtotal | 15,253,930 | 1,038.90 | 13,551,370 | 1,061.70 | 1,143,320 | 878.10 | 531,740 | 809.40 | |
| 62–64 | 1,331,110 | 1,022.50 | 1,150,820 | 1,051.90 | 119,510 | 872.90 | 60,760 | 762.00 | |
| 62 | 359,570 | 1,018.50 | 310,740 | 1,047.70 | 31,730 | 871.70 | 17,100 | 760.70 | |
| 63 | 468,100 | 1,024.20 | 404,470 | 1,053.40 | 42,140 | 876.90 | 21,480 | 763.30 | |
| 64 | 503,440 | 1,023.90 | 435,610 | 1,053.40 | 45,640 | 869.90 | 22,180 | 761.70 | |
| 65–69 | 4,255,460 | 1,073.00 | 3,695,420 | 1,102.80 | 363,530 | 911.30 | 194,450 | 811.00 | |
| 65 | 862,580 | 1,117.50 | 748,310 | 1,148.70 | 72,320 | 948.80 | 41,700 | 852.50 | |
| 66 | 897,990 | 1,109.20 | 776,840 | 1,141.20 | 78,780 | 940.00 | 41,990 | 835.90 | |
| 67 | 858,620 | 1,061.50 | 744,260 | 1,091.20 | 73,180 | 907.00 | 40,850 | 797.40 | |
| 68 | 835,560 | 1,039.50 | 726,820 | 1,068.10 | 71,680 | 878.90 | 36,540 | 788.60 | |
| 69 | 800,710 | 1,031.60 | 699,190 | 1,059.20 | 67,570 | 876.50 | 33,370 | 769.10 | |

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.1—Number and average monthly benefit for retired workers, by sex, age, and race, December 2003—Continued

| Age | All races ^a | | White | | Black | | Other ^b | |
|--------------------|------------------------|-----------------------------------|------------|-----------------------------------|-----------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| <i>Men (cont.)</i> | | | | | | | | |
| 70–74 | 3,587,960 | 1,032.90 | 3,181,670 | 1,056.80 | 275,760 | 869.60 | 125,030 | 793.20 |
| 70 | 747,200 | 1,035.70 | 653,440 | 1,062.80 | 61,780 | 875.10 | 31,260 | 791.80 |
| 71 | 743,520 | 1,050.90 | 653,320 | 1,077.10 | 62,300 | 883.10 | 27,120 | 811.40 |
| 72 | 721,840 | 1,032.80 | 643,250 | 1,056.40 | 52,790 | 866.10 | 24,560 | 783.80 |
| 73 | 715,430 | 1,024.10 | 640,230 | 1,046.70 | 51,430 | 860.50 | 22,560 | 768.60 |
| 74 | 659,970 | 1,019.10 | 591,430 | 1,039.40 | 47,460 | 858.50 | 19,530 | 810.60 |
| 75–79 | 2,900,900 | 1,027.10 | 2,620,820 | 1,046.10 | 195,220 | 857.30 | 76,720 | 823.30 |
| 75 | 646,000 | 1,033.70 | 580,720 | 1,053.50 | 45,260 | 870.70 | 18,630 | 829.30 |
| 76 | 621,780 | 1,037.70 | 560,290 | 1,058.60 | 42,480 | 860.50 | 17,210 | 807.80 |
| 77 | 578,380 | 1,020.10 | 523,060 | 1,038.30 | 38,750 | 854.40 | 14,750 | 815.90 |
| 78 | 541,270 | 1,033.70 | 490,360 | 1,052.10 | 35,970 | 854.60 | 13,370 | 847.20 |
| 79 | 513,470 | 1,006.90 | 466,390 | 1,024.00 | 32,760 | 841.20 | 12,760 | 819.10 |
| 80–84 | 1,921,010 | 973.60 | 1,751,100 | 988.50 | 116,760 | 820.50 | 46,300 | 809.20 |
| 80 | 469,110 | 987.50 | 427,100 | 1,003.10 | 28,410 | 832.70 | 12,160 | 812.50 |
| 81 | 427,460 | 977.70 | 387,740 | 993.80 | 27,370 | 826.20 | 10,730 | 801.00 |
| 82 | 398,700 | 968.20 | 365,200 | 982.50 | 23,330 | 808.10 | 8,810 | 805.40 |
| 83 | 344,370 | 954.80 | 314,580 | 968.40 | 20,210 | 803.30 | 8,250 | 815.60 |
| 84 | 281,370 | 974.90 | 256,480 | 989.00 | 17,440 | 828.40 | 6,350 | 813.90 |
| 85–89 | 903,020 | 1,098.80 | 830,380 | 1,112.90 | 49,740 | 923.00 | 19,110 | 945.00 |
| 85 | 251,870 | 1,029.60 | 231,630 | 1,043.50 | 13,970 | 868.60 | 5,250 | 854.20 |
| 86 | 210,850 | 1,077.40 | 194,620 | 1,090.10 | 10,930 | 905.10 | 4,370 | 938.40 |
| 87 | 174,700 | 1,164.40 | 160,560 | 1,180.20 | 10,080 | 970.50 | 3,390 | 1,013.30 |
| 88 | 145,570 | 1,153.10 | 134,090 | 1,165.90 | 7,570 | 976.20 | 3,240 | 1,024.50 |
| 89 | 120,030 | 1,119.90 | 109,480 | 1,136.50 | 7,190 | 933.10 | 2,860 | 951.10 |
| 90–94 | 293,640 | 1,065.10 | 267,730 | 1,080.60 | 17,590 | 876.00 | 7,300 | 920.10 |
| 95 or older | 60,830 | 972.30 | 53,430 | 994.40 | 5,210 | 776.00 | 2,070 | 864.70 |
| <i>Women</i> | | | | | | | | |
| Subtotal | 14,293,600 | 797.50 | 12,577,560 | 807.70 | 1,262,530 | 734.30 | 417,790 | 679.10 |
| 62–64 | 1,256,200 | 684.90 | 1,092,100 | 686.80 | 108,940 | 714.40 | 55,150 | 589.70 |
| 62 | 348,820 | 671.50 | 302,730 | 672.80 | 27,970 | 712.10 | 18,120 | 586.00 |
| 63 | 438,550 | 686.00 | 381,960 | 687.40 | 38,950 | 716.10 | 17,640 | 590.50 |
| 64 | 468,830 | 693.90 | 407,410 | 696.60 | 42,020 | 714.40 | 19,390 | 592.40 |
| 65–69 | 3,474,760 | 755.40 | 2,986,630 | 761.40 | 347,780 | 741.90 | 138,950 | 660.90 |
| 65 | 722,000 | 765.50 | 620,710 | 769.70 | 69,880 | 766.60 | 31,200 | 681.00 |
| 66 | 729,920 | 769.60 | 625,510 | 775.40 | 73,810 | 759.60 | 30,370 | 673.80 |
| 67 | 695,710 | 752.70 | 598,570 | 758.70 | 68,960 | 741.80 | 27,900 | 650.70 |
| 68 | 676,410 | 743.50 | 581,130 | 750.60 | 69,710 | 718.10 | 25,300 | 651.90 |
| 69 | 650,720 | 743.40 | 560,710 | 750.60 | 65,420 | 720.90 | 24,180 | 640.00 |
| 70–74 | 2,996,040 | 767.90 | 2,613,480 | 776.80 | 280,330 | 721.00 | 97,890 | 671.00 |
| 70 | 614,270 | 757.60 | 529,580 | 765.50 | 61,290 | 722.50 | 23,020 | 671.80 |
| 71 | 622,640 | 770.70 | 539,400 | 779.00 | 61,690 | 732.60 | 21,060 | 674.00 |
| 72 | 600,290 | 768.20 | 525,750 | 777.30 | 54,650 | 721.00 | 19,120 | 658.20 |
| 73 | 595,610 | 768.60 | 524,010 | 777.90 | 52,310 | 712.50 | 18,400 | 670.00 |
| 74 | 563,230 | 775.30 | 494,740 | 784.90 | 50,390 | 713.90 | 16,290 | 682.30 |
| 75–79 | 2,649,480 | 804.40 | 2,356,850 | 814.40 | 219,290 | 725.70 | 61,870 | 715.20 |
| 75 | 563,750 | 787.70 | 498,750 | 797.00 | 48,020 | 721.30 | 14,650 | 703.20 |
| 76 | 554,270 | 798.20 | 491,240 | 807.70 | 47,200 | 726.20 | 13,770 | 719.00 |
| 77 | 523,470 | 803.00 | 466,640 | 812.10 | 42,970 | 729.30 | 11,450 | 715.60 |
| 78 | 511,210 | 817.60 | 455,830 | 828.40 | 41,380 | 729.90 | 11,740 | 720.90 |
| 79 | 496,780 | 818.50 | 444,390 | 829.50 | 39,720 | 722.20 | 10,260 | 720.60 |

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.1—Number and average monthly benefit for retired workers, by sex, age, and race, December 2003—Continued

| Age | All races ^a | | White | | Black | | Other ^b | |
|----------------------|------------------------|-----------------------------------|-----------|-----------------------------------|---------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| Women (cont.) | | | | | | | | |
| 80–84 | 1,999,780 | 849.90 | 1,798,160 | 862.30 | 154,320 | 733.40 | 37,190 | 734.30 |
| 80 | 458,440 | 826.80 | 411,490 | 838.00 | 35,340 | 723.90 | 9,590 | 725.20 |
| 81 | 427,940 | 838.90 | 383,470 | 850.50 | 33,570 | 732.70 | 8,540 | 741.00 |
| 82 | 417,730 | 849.00 | 376,680 | 861.70 | 31,340 | 726.50 | 7,670 | 733.80 |
| 83 | 371,160 | 865.10 | 334,870 | 878.10 | 28,240 | 743.40 | 6,120 | 724.00 |
| 84 | 324,510 | 880.60 | 291,650 | 894.90 | 25,830 | 745.10 | 5,270 | 752.90 |
| 85–89 | 1,224,270 | 943.60 | 1,108,710 | 957.80 | 91,230 | 790.00 | 18,330 | 842.10 |
| 85 | 309,170 | 913.00 | 280,430 | 926.50 | 22,490 | 769.70 | 4,700 | 791.40 |
| 86 | 272,230 | 931.40 | 246,620 | 944.90 | 19,790 | 781.50 | 4,360 | 858.50 |
| 87 | 241,240 | 974.50 | 217,780 | 989.40 | 18,930 | 819.60 | 3,430 | 875.50 |
| 88 | 213,830 | 961.00 | 194,070 | 975.20 | 15,400 | 807.70 | 3,270 | 850.10 |
| 89 | 187,800 | 951.90 | 169,810 | 967.90 | 14,620 | 775.80 | 2,570 | 852.40 |
| 90–94 | 533,820 | 917.30 | 480,900 | 933.60 | 44,120 | 756.00 | 6,780 | 804.30 |
| 95 or older | 159,250 | 859.90 | 140,730 | 881.20 | 16,520 | 686.40 | 1,630 | 749.10 |

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.

- a. Includes 63,220 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).

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5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.2—Number and average monthly benefit for disabled workers, by sex, age, and race, December 2003

| Age | All races ^a | | White | | Black | | Other ^b | |
|-----------------------------|------------------------|-----------------------------------|-----------|-----------------------------------|---------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| <i>All disabled workers</i> | | | | | | | | |
| Total | 5,867,460 | 861.70 | 4,220,300 | 890.40 | 991,810 | 800.20 | 620,870 | 767.50 |
| Under 20 | 1,620 | 362.10 | 1,090 | 368.90 | 280 | 351.90 | 250 | 344.00 |
| 20–24 | 54,820 | 475.20 | 35,890 | 482.40 | 10,710 | 446.00 | 8,220 | 481.90 |
| 20 | 3,260 | 384.60 | 2,280 | 391.80 | 500 | 353.60 | 480 | 382.50 |
| 21 | 7,540 | 418.00 | 4,690 | 425.70 | 1,500 | 379.60 | 1,350 | 433.70 |
| 22 | 10,850 | 458.70 | 7,230 | 459.00 | 1,960 | 424.70 | 1,660 | 497.90 |
| 23 | 14,970 | 483.90 | 9,580 | 492.80 | 3,130 | 451.90 | 2,260 | 490.30 |
| 24 | 18,200 | 517.90 | 12,110 | 527.20 | 3,620 | 492.80 | 2,470 | 509.00 |
| 25–29 | 125,720 | 573.40 | 80,450 | 586.70 | 24,700 | 554.80 | 20,510 | 542.70 |
| 25 | 20,120 | 532.00 | 12,940 | 541.30 | 4,130 | 515.40 | 3,050 | 514.80 |
| 26 | 23,970 | 557.80 | 15,550 | 564.50 | 4,760 | 553.80 | 3,660 | 534.50 |
| 27 | 24,550 | 571.50 | 15,800 | 582.20 | 4,500 | 549.40 | 4,240 | 552.00 |
| 28 | 27,100 | 590.20 | 17,450 | 607.60 | 5,060 | 560.20 | 4,580 | 556.30 |
| 29 | 29,980 | 599.90 | 18,710 | 620.90 | 6,250 | 581.00 | 4,980 | 545.50 |
| 30–34 | 214,220 | 644.00 | 141,100 | 662.80 | 38,060 | 618.40 | 33,760 | 596.00 |
| 30 | 31,520 | 605.70 | 20,030 | 629.70 | 6,140 | 580.90 | 5,270 | 543.70 |
| 31 | 37,170 | 625.10 | 23,920 | 641.90 | 6,830 | 599.20 | 6,180 | 588.70 |
| 32 | 43,040 | 641.70 | 28,560 | 658.80 | 7,530 | 623.90 | 6,750 | 590.90 |
| 33 | 50,280 | 658.00 | 33,730 | 675.30 | 8,500 | 628.60 | 7,640 | 618.30 |
| 34 | 52,210 | 668.90 | 34,860 | 687.20 | 9,060 | 644.10 | 7,920 | 619.20 |
| 35–39 | 373,110 | 711.10 | 251,960 | 730.50 | 67,880 | 672.70 | 50,110 | 669.20 |
| 35 | 59,820 | 683.50 | 40,030 | 697.80 | 10,800 | 654.70 | 8,520 | 654.10 |
| 36 | 62,830 | 699.00 | 41,790 | 717.20 | 11,580 | 662.70 | 8,820 | 663.50 |
| 37 | 71,710 | 708.90 | 48,270 | 730.50 | 13,040 | 669.50 | 9,730 | 662.20 |
| 38 | 83,680 | 714.50 | 56,750 | 733.00 | 15,170 | 679.40 | 11,020 | 668.90 |
| 39 | 95,070 | 735.10 | 65,120 | 756.70 | 17,290 | 687.20 | 12,020 | 690.00 |
| 40–44 | 610,200 | 767.50 | 424,840 | 790.40 | 108,940 | 704.50 | 71,790 | 731.50 |
| 40 | 101,200 | 739.40 | 69,750 | 762.70 | 17,880 | 681.70 | 12,810 | 696.60 |
| 41 | 111,750 | 748.30 | 77,760 | 769.80 | 19,820 | 681.80 | 13,400 | 725.20 |
| 42 | 122,200 | 766.20 | 85,750 | 788.30 | 21,720 | 703.00 | 13,720 | 736.60 |
| 43 | 131,690 | 778.80 | 92,220 | 802.00 | 23,340 | 715.80 | 15,030 | 740.90 |
| 44 | 143,360 | 792.80 | 99,360 | 817.20 | 26,180 | 728.30 | 16,830 | 750.70 |
| 45–49 | 822,430 | 827.50 | 571,550 | 853.50 | 150,120 | 768.00 | 94,610 | 767.90 |
| 45 | 148,140 | 799.50 | 103,340 | 821.40 | 27,110 | 743.20 | 16,700 | 760.10 |
| 46 | 159,380 | 813.00 | 111,160 | 837.10 | 28,740 | 754.00 | 18,280 | 759.60 |
| 47 | 166,580 | 827.80 | 114,830 | 857.30 | 30,930 | 760.40 | 19,650 | 762.60 |
| 48 | 171,540 | 840.60 | 119,110 | 867.20 | 31,680 | 784.00 | 19,450 | 775.80 |
| 49 | 176,790 | 851.20 | 123,110 | 878.40 | 31,660 | 793.50 | 20,530 | 779.20 |
| 50–54 | 1,017,660 | 888.30 | 714,200 | 910.70 | 181,830 | 841.90 | 112,820 | 820.80 |
| 50 | 183,140 | 869.80 | 128,020 | 894.10 | 33,190 | 816.10 | 20,440 | 805.40 |
| 51 | 196,130 | 876.20 | 139,470 | 898.70 | 33,890 | 824.10 | 21,320 | 812.60 |
| 52 | 205,650 | 890.00 | 144,020 | 910.90 | 37,080 | 843.00 | 22,690 | 833.80 |
| 53 | 210,070 | 895.80 | 146,940 | 920.60 | 37,860 | 851.00 | 23,380 | 813.80 |
| 54 | 222,670 | 905.50 | 155,750 | 925.90 | 39,810 | 868.70 | 24,990 | 835.10 |
| 55–59 | 1,257,030 | 937.50 | 926,400 | 961.40 | 200,710 | 885.80 | 122,600 | 844.40 |
| 55 | 240,590 | 924.10 | 172,010 | 945.70 | 39,810 | 878.00 | 26,320 | 855.00 |
| 56 | 264,150 | 936.30 | 193,410 | 956.80 | 41,760 | 890.00 | 27,070 | 862.80 |
| 57 | 256,570 | 940.10 | 190,490 | 963.80 | 39,860 | 887.80 | 24,910 | 846.00 |
| 58 | 239,010 | 936.40 | 175,750 | 964.40 | 39,430 | 880.40 | 22,940 | 822.10 |
| 59 | 256,710 | 949.70 | 194,740 | 975.00 | 39,850 | 892.50 | 21,360 | 830.20 |

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.2—Number and average monthly benefit for disabled workers, by sex, age, and race, December 2003—Continued

| Age | All races ^a | | White | | Black | | Other ^b | |
|-------------------------------------|------------------------|-----------------------------------|-----------|-----------------------------------|---------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| <i>All disabled workers (cont.)</i> | | | | | | | | |
| 60–65 | 1,390,650 | 950.90 | 1,072,820 | 979.20 | 208,580 | 877.40 | 106,200 | 813.80 |
| 60 | 282,230 | 952.40 | 215,820 | 977.50 | 42,900 | 893.80 | 22,860 | 826.50 |
| 61 | 282,520 | 956.40 | 217,230 | 985.30 | 41,680 | 886.40 | 22,850 | 811.10 |
| 62 | 271,880 | 956.80 | 209,210 | 986.10 | 40,640 | 880.50 | 21,470 | 820.30 |
| 63 | 261,200 | 952.80 | 202,970 | 982.40 | 38,920 | 868.20 | 18,910 | 812.90 |
| 64 | 248,690 | 940.40 | 193,270 | 968.30 | 37,770 | 862.40 | 17,050 | 803.20 |
| 65 | 44,130 | 919.10 | 34,320 | 949.90 | 6,670 | 835.60 | 3,060 | 757.80 |
| <i>Men</i> | | | | | | | | |
| Subtotal | 3,225,850 | 965.90 | 2,356,030 | 1,007.30 | 518,360 | 859.40 | 330,150 | 844.80 |
| Under 20 | 890 | 362.10 | 640 | 373.40 | 130 | 338.40 | 120 | 327.30 |
| 20–24 | 32,450 | 486.40 | 21,290 | 495.70 | 6,150 | 449.10 | 5,010 | 492.70 |
| 20 | 1,900 | 388.10 | 1,280 | 403.60 | 310 | 340.20 | 310 | 372.00 |
| 21 | 4,530 | 425.40 | 2,810 | 434.70 | 910 | 378.20 | 810 | 446.40 |
| 22 | 6,620 | 474.00 | 4,510 | 477.70 | 1,070 | 422.30 | 1,040 | 511.20 |
| 23 | 8,910 | 493.30 | 5,770 | 499.20 | 1,700 | 463.00 | 1,440 | 505.20 |
| 24 | 10,490 | 532.50 | 6,920 | 546.30 | 2,160 | 496.80 | 1,410 | 519.50 |
| 25–29 | 70,350 | 583.00 | 45,000 | 600.80 | 13,560 | 553.10 | 11,750 | 548.30 |
| 25 | 11,750 | 539.40 | 7,560 | 550.60 | 2,200 | 520.20 | 1,990 | 518.20 |
| 26 | 13,560 | 569.40 | 8,660 | 583.50 | 2,760 | 555.60 | 2,140 | 529.80 |
| 27 | 13,560 | 588.00 | 8,940 | 601.70 | 2,260 | 557.60 | 2,350 | 559.70 |
| 28 | 15,270 | 596.70 | 9,640 | 622.40 | 2,970 | 552.00 | 2,660 | 553.70 |
| 29 | 16,210 | 608.80 | 10,200 | 631.60 | 3,370 | 570.30 | 2,610 | 570.50 |
| 30–34 | 116,040 | 658.30 | 75,790 | 679.30 | 20,090 | 626.40 | 19,320 | 611.60 |
| 30 | 16,760 | 619.60 | 10,550 | 643.70 | 3,260 | 593.80 | 2,880 | 561.00 |
| 31 | 20,300 | 636.60 | 13,130 | 655.90 | 3,530 | 591.90 | 3,540 | 609.70 |
| 32 | 23,080 | 662.90 | 15,010 | 684.60 | 3,890 | 628.80 | 4,030 | 615.70 |
| 33 | 27,000 | 673.00 | 17,860 | 692.20 | 4,420 | 642.90 | 4,430 | 632.40 |
| 34 | 28,900 | 678.80 | 19,240 | 698.50 | 4,990 | 655.80 | 4,440 | 621.40 |
| 35–39 | 203,720 | 729.90 | 136,070 | 755.60 | 37,150 | 675.00 | 28,470 | 682.80 |
| 35 | 32,640 | 695.40 | 21,370 | 710.40 | 5,940 | 663.00 | 4,970 | 671.60 |
| 36 | 34,200 | 712.80 | 22,510 | 738.40 | 6,310 | 660.50 | 4,950 | 668.40 |
| 37 | 38,900 | 728.00 | 26,140 | 756.20 | 6,780 | 673.90 | 5,540 | 671.00 |
| 38 | 45,790 | 734.70 | 30,450 | 761.00 | 8,600 | 676.60 | 6,300 | 686.60 |
| 39 | 52,190 | 759.70 | 35,600 | 788.50 | 9,520 | 691.30 | 6,710 | 708.00 |
| 40–44 | 334,810 | 803.50 | 232,910 | 833.00 | 59,360 | 718.70 | 39,700 | 765.20 |
| 40 | 55,240 | 764.20 | 37,580 | 789.80 | 10,130 | 696.50 | 7,050 | 729.60 |
| 41 | 61,840 | 777.10 | 43,260 | 802.70 | 10,580 | 690.40 | 7,550 | 756.90 |
| 42 | 67,090 | 800.10 | 47,100 | 829.90 | 11,830 | 714.70 | 7,500 | 762.20 |
| 43 | 72,030 | 819.50 | 50,550 | 848.90 | 12,500 | 737.80 | 8,330 | 774.60 |
| 44 | 78,610 | 840.00 | 54,420 | 874.60 | 14,320 | 742.10 | 9,270 | 792.90 |
| 45–49 | 446,490 | 892.90 | 312,070 | 928.80 | 81,200 | 799.90 | 49,420 | 826.20 |
| 45 | 80,460 | 853.20 | 56,260 | 882.20 | 14,690 | 774.30 | 8,860 | 807.80 |
| 46 | 86,560 | 872.90 | 60,490 | 909.20 | 15,540 | 773.60 | 9,770 | 810.60 |
| 47 | 91,730 | 889.80 | 63,010 | 932.40 | 17,430 | 784.80 | 10,570 | 813.50 |
| 48 | 92,390 | 913.60 | 64,900 | 948.50 | 16,990 | 825.60 | 9,800 | 844.70 |
| 49 | 95,350 | 927.60 | 67,410 | 963.00 | 16,550 | 837.00 | 10,420 | 851.90 |
| 50–54 | 551,340 | 989.20 | 394,580 | 1,020.60 | 93,350 | 900.00 | 58,220 | 921.90 |
| 50 | 98,470 | 954.20 | 70,080 | 986.50 | 17,150 | 861.60 | 10,440 | 891.30 |
| 51 | 106,530 | 972.20 | 77,660 | 1,002.70 | 16,900 | 881.50 | 11,210 | 900.20 |
| 52 | 111,440 | 993.80 | 79,100 | 1,024.50 | 19,280 | 903.40 | 11,980 | 937.50 |
| 53 | 113,810 | 1,000.90 | 81,580 | 1,032.10 | 19,430 | 912.80 | 11,550 | 934.30 |
| 54 | 121,090 | 1,017.20 | 86,160 | 1,050.00 | 20,590 | 931.70 | 13,040 | 939.60 |

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.2—Number and average monthly benefit for disabled workers, by sex, age, and race, December 2003—Continued

| Age | All races ^a | | White | | Black | | Other ^b | |
|--------------------|------------------------|-----------------------------------|-----------|-----------------------------------|---------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| Men (cont.) | | | | | | | | |
| 55-59 | 689,750 | 1,081.80 | 518,410 | 1,116.60 | 102,560 | 981.70 | 64,060 | 969.50 |
| 55 | 131,540 | 1,050.50 | 95,530 | 1,083.80 | 20,370 | 958.00 | 14,030 | 969.30 |
| 56 | 144,780 | 1,072.20 | 107,350 | 1,103.00 | 22,060 | 985.80 | 14,110 | 982.70 |
| 57 | 140,520 | 1,085.30 | 106,670 | 1,118.50 | 20,020 | 978.90 | 13,040 | 981.80 |
| 58 | 130,700 | 1,090.70 | 98,190 | 1,131.60 | 20,100 | 976.20 | 11,830 | 952.60 |
| 59 | 142,210 | 1,108.70 | 110,670 | 1,142.80 | 20,010 | 1,009.70 | 11,050 | 956.60 |
| 60-65 | 780,010 | 1,121.10 | 619,270 | 1,155.90 | 104,810 | 1,003.60 | 54,080 | 956.20 |
| 60 | 154,710 | 1,119.50 | 121,530 | 1,153.60 | 21,470 | 1,008.80 | 11,250 | 967.80 |
| 61 | 157,160 | 1,128.40 | 124,230 | 1,164.80 | 21,410 | 1,005.10 | 11,010 | 964.10 |
| 62 | 152,910 | 1,128.70 | 120,890 | 1,164.80 | 20,490 | 1,010.40 | 11,230 | 960.30 |
| 63 | 147,890 | 1,124.70 | 118,540 | 1,159.40 | 19,220 | 1,002.20 | 9,920 | 952.30 |
| 64 | 142,410 | 1,109.00 | 113,930 | 1,141.80 | 19,030 | 995.20 | 9,130 | 943.70 |
| 65 | 24,930 | 1,086.40 | 20,150 | 1,119.90 | 3,190 | 973.60 | 1,540 | 883.90 |
| Women | | | | | | | | |
| Subtotal | 2,641,610 | 734.40 | 1,864,270 | 742.60 | 473,450 | 735.50 | 290,720 | 679.80 |
| Under 20 | 730 | 362.30 | 450 | 362.60 | 150 | 363.70 | 130 | 359.40 |
| 20-24 | 22,370 | 459.00 | 14,600 | 463.00 | 4,560 | 442.00 | 3,210 | 464.90 |
| 20 | 1,360 | 379.70 | 1,000 | 376.80 | 190 | 375.40 | 170 | 401.60 |
| 21 | 3,010 | 406.70 | 1,880 | 412.30 | 590 | 381.60 | 540 | 414.60 |
| 22 | 4,230 | 434.80 | 2,720 | 427.80 | 890 | 427.60 | 620 | 475.60 |
| 23 | 6,060 | 470.00 | 3,810 | 483.10 | 1,430 | 438.70 | 820 | 464.10 |
| 24 | 7,710 | 498.00 | 5,190 | 501.70 | 1,460 | 487.00 | 1,060 | 495.00 |
| 25-29 | 55,370 | 561.10 | 35,450 | 568.80 | 11,140 | 556.80 | 8,760 | 535.30 |
| 25 | 8,370 | 521.60 | 5,380 | 528.30 | 1,930 | 510.00 | 1,060 | 508.50 |
| 26 | 10,410 | 542.60 | 6,890 | 540.50 | 2,000 | 551.30 | 1,520 | 541.00 |
| 27 | 10,990 | 551.20 | 6,860 | 556.90 | 2,240 | 541.10 | 1,890 | 542.50 |
| 28 | 11,830 | 581.70 | 7,810 | 589.40 | 2,090 | 571.90 | 1,920 | 559.80 |
| 29 | 13,770 | 589.40 | 8,510 | 608.20 | 2,880 | 593.40 | 2,370 | 517.90 |
| 30-34 | 98,180 | 627.00 | 65,310 | 643.60 | 17,970 | 609.40 | 14,440 | 575.10 |
| 30 | 14,760 | 590.00 | 9,480 | 614.20 | 2,880 | 566.30 | 2,390 | 522.90 |
| 31 | 16,870 | 611.20 | 10,790 | 624.80 | 3,300 | 607.00 | 2,640 | 560.50 |
| 32 | 19,960 | 617.20 | 13,550 | 630.20 | 3,640 | 618.70 | 2,720 | 554.10 |
| 33 | 23,280 | 640.60 | 15,870 | 656.30 | 4,080 | 613.30 | 3,210 | 599.00 |
| 34 | 23,310 | 656.70 | 15,620 | 673.30 | 4,070 | 629.80 | 3,480 | 616.40 |
| 35-39 | 169,390 | 688.50 | 115,890 | 700.90 | 30,730 | 670.00 | 21,640 | 651.20 |
| 35 | 27,180 | 669.10 | 18,660 | 683.40 | 4,860 | 644.60 | 3,550 | 629.50 |
| 36 | 28,630 | 682.40 | 19,280 | 692.60 | 5,270 | 665.40 | 3,870 | 657.20 |
| 37 | 32,810 | 686.30 | 22,130 | 700.20 | 6,260 | 664.70 | 4,190 | 650.60 |
| 38 | 37,890 | 690.10 | 26,300 | 700.60 | 6,570 | 683.00 | 4,720 | 645.20 |
| 39 | 42,880 | 705.00 | 29,520 | 718.30 | 7,770 | 682.10 | 5,310 | 667.20 |
| 40-44 | 275,390 | 723.70 | 191,930 | 738.80 | 49,580 | 687.40 | 32,090 | 689.90 |
| 40 | 45,960 | 709.70 | 32,170 | 731.10 | 7,750 | 662.30 | 5,760 | 656.30 |
| 41 | 49,910 | 712.50 | 34,500 | 728.50 | 9,240 | 672.00 | 5,850 | 684.30 |
| 42 | 55,110 | 724.90 | 38,650 | 737.60 | 9,890 | 689.10 | 6,220 | 705.60 |
| 43 | 59,660 | 729.60 | 41,670 | 745.10 | 10,840 | 690.40 | 6,700 | 699.00 |
| 44 | 64,750 | 735.60 | 44,940 | 747.50 | 11,860 | 711.60 | 7,560 | 698.90 |
| 45-49 | 375,940 | 749.80 | 259,480 | 762.90 | 68,920 | 730.40 | 45,190 | 704.10 |
| 45 | 67,680 | 735.70 | 47,080 | 748.90 | 12,420 | 706.30 | 7,840 | 706.10 |
| 46 | 72,820 | 741.80 | 50,670 | 750.90 | 13,200 | 731.00 | 8,510 | 701.00 |
| 47 | 74,850 | 751.70 | 51,820 | 765.90 | 13,500 | 728.90 | 9,080 | 703.20 |
| 48 | 79,150 | 755.30 | 54,210 | 769.80 | 14,690 | 735.80 | 9,650 | 705.70 |
| 49 | 81,440 | 761.70 | 55,700 | 776.10 | 15,110 | 745.90 | 10,110 | 704.30 |

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.2—Number and average monthly benefit for disabled workers, by sex, age, and race, December 2003—Continued

| Age | All races ^a | | White | | Black | | Other ^b | |
|----------------------|------------------------|-----------------------------------|---------|-----------------------------------|---------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| <i>Women (cont.)</i> | | | | | | | | |
| 50–54 | 466,320 | 769.10 | 319,620 | 775.10 | 88,480 | 780.60 | 54,600 | 713.00 |
| 50 | 84,670 | 771.70 | 57,940 | 782.20 | 16,040 | 767.40 | 10,000 | 715.60 |
| 51 | 89,600 | 762.10 | 61,810 | 768.00 | 16,990 | 767.10 | 10,110 | 715.50 |
| 52 | 94,210 | 767.10 | 64,920 | 772.40 | 17,800 | 777.50 | 10,710 | 717.80 |
| 53 | 96,260 | 771.60 | 65,360 | 781.30 | 18,430 | 785.80 | 11,830 | 696.20 |
| 54 | 101,580 | 772.30 | 69,590 | 772.40 | 19,220 | 801.30 | 11,950 | 721.00 |
| 55–59 | 567,280 | 762.10 | 407,990 | 764.30 | 98,150 | 785.50 | 58,540 | 707.50 |
| 55 | 109,050 | 771.70 | 76,480 | 773.20 | 19,440 | 794.20 | 12,290 | 724.40 |
| 56 | 119,370 | 771.50 | 86,060 | 774.30 | 19,700 | 782.60 | 12,960 | 732.30 |
| 57 | 116,050 | 764.20 | 83,820 | 766.90 | 19,840 | 795.80 | 11,870 | 696.80 |
| 58 | 108,310 | 750.20 | 77,560 | 752.70 | 19,330 | 780.70 | 11,110 | 683.30 |
| 59 | 114,500 | 752.30 | 84,070 | 754.20 | 19,840 | 774.20 | 10,310 | 694.70 |
| 60–65 | 610,640 | 733.60 | 453,550 | 737.90 | 103,770 | 749.90 | 52,120 | 666.10 |
| 60 | 127,520 | 749.60 | 94,290 | 750.60 | 21,430 | 778.60 | 11,610 | 689.60 |
| 61 | 125,360 | 740.70 | 93,000 | 745.60 | 20,270 | 761.00 | 11,840 | 668.90 |
| 62 | 118,970 | 735.90 | 88,320 | 741.50 | 20,150 | 748.30 | 10,240 | 666.80 |
| 63 | 113,310 | 728.50 | 84,430 | 734.10 | 19,700 | 737.50 | 8,990 | 659.20 |
| 64 | 106,280 | 714.40 | 79,340 | 719.20 | 18,740 | 727.50 | 7,920 | 641.10 |
| 65 | 19,200 | 701.90 | 14,170 | 708.20 | 3,480 | 709.10 | 1,520 | 630.10 |

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.

- a. Includes 34,480 persons of unknown race.
- b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.3—Number and average monthly benefit for spouses, by marital status, basis of entitlement, age, and race, December 2003

| Basis of entitlement and age | All races ^a | | White | | Black | | Other ^b | |
|---------------------------------------|------------------------|-----------------------------------|-----------|-----------------------------------|---------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| All spouses | | | | | | | | |
| Total | 2,773,630 | 450.30 | 2,492,820 | 463.40 | 142,240 | 359.50 | 131,060 | 303.30 |
| <i>Wives</i> | | | | | | | | |
| Subtotal | 2,733,950 | 453.10 | 2,468,390 | 465.40 | 137,360 | 362.60 | 120,880 | 309.60 |
| Entitlement based on care of children | 146,750 | 251.00 | 107,820 | 269.80 | 19,160 | 219.80 | 19,260 | 179.40 |
| Under 35 | 19,520 | 142.40 | 13,860 | 151.70 | 2,530 | 119.50 | 3,050 | 119.30 |
| 35–39 | 22,090 | 176.30 | 15,780 | 190.50 | 2,790 | 148.30 | 3,450 | 135.10 |
| 40–44 | 29,390 | 216.30 | 21,090 | 229.90 | 3,930 | 197.70 | 4,240 | 168.70 |
| 45–49 | 28,240 | 264.20 | 20,310 | 280.30 | 4,030 | 240.90 | 3,820 | 204.60 |
| 50–54 | 20,630 | 306.70 | 15,400 | 326.60 | 2,700 | 273.80 | 2,450 | 222.00 |
| 55–59 | 14,130 | 335.70 | 10,920 | 357.20 | 1,640 | 283.70 | 1,500 | 242.00 |
| 60–61 | 5,500 | 415.80 | 4,400 | 436.60 | 760 | 352.60 | 340 | 286.70 |
| 62–64 | 7,250 | 411.60 | 6,060 | 426.40 | 780 | 353.70 | 410 | 302.70 |
| Entitlement based on age | 2,587,200 | 464.60 | 2,360,570 | 474.30 | 118,200 | 385.70 | 101,620 | 334.30 |
| 62–64 | 292,030 | 418.80 | 260,490 | 430.80 | 15,100 | 341.60 | 16,220 | 299.10 |
| 62 | 75,500 | 408.40 | 67,560 | 418.60 | 4,000 | 345.50 | 3,920 | 297.70 |
| 63 | 101,250 | 417.00 | 90,080 | 429.50 | 5,050 | 342.10 | 6,040 | 294.00 |
| 64 | 115,280 | 427.10 | 102,850 | 439.90 | 6,050 | 338.70 | 6,260 | 304.90 |
| 65–69 | 698,580 | 466.90 | 623,550 | 479.70 | 37,360 | 392.00 | 36,610 | 330.20 |
| 65 | 137,980 | 460.80 | 122,870 | 473.10 | 7,280 | 395.50 | 7,700 | 327.60 |
| 66 | 139,360 | 469.20 | 124,050 | 483.10 | 7,520 | 393.10 | 7,620 | 321.00 |
| 67 | 140,100 | 469.50 | 124,790 | 482.80 | 7,300 | 392.00 | 7,810 | 332.60 |
| 68 | 141,010 | 468.60 | 125,900 | 481.30 | 7,730 | 384.40 | 7,140 | 341.10 |
| 69 | 140,130 | 466.50 | 125,940 | 477.90 | 7,530 | 395.40 | 6,340 | 329.40 |
| 70–74 | 661,410 | 468.70 | 604,890 | 478.40 | 30,010 | 389.70 | 24,820 | 333.70 |
| 70 | 133,960 | 468.80 | 120,960 | 481.20 | 6,380 | 379.20 | 6,380 | 328.10 |
| 71 | 135,920 | 469.30 | 124,170 | 479.10 | 6,420 | 384.30 | 4,990 | 341.80 |
| 72 | 134,030 | 470.20 | 123,320 | 478.90 | 5,740 | 402.20 | 4,590 | 327.20 |
| 73 | 133,650 | 468.20 | 122,490 | 476.70 | 6,090 | 401.80 | 4,690 | 338.20 |
| 74 | 123,850 | 466.70 | 113,950 | 475.90 | 5,380 | 381.40 | 4,170 | 334.60 |
| 75–79 | 522,830 | 466.60 | 484,940 | 473.30 | 21,310 | 393.30 | 14,570 | 355.00 |
| 75 | 120,140 | 466.20 | 110,490 | 473.90 | 5,400 | 392.00 | 3,730 | 352.50 |
| 76 | 115,070 | 470.20 | 107,070 | 476.50 | 4,560 | 400.90 | 3,060 | 355.00 |
| 77 | 103,190 | 467.00 | 95,670 | 474.60 | 4,290 | 381.30 | 2,890 | 349.00 |
| 78 | 96,830 | 466.70 | 89,570 | 473.00 | 4,030 | 397.70 | 2,830 | 365.60 |
| 79 | 87,600 | 461.90 | 82,140 | 467.00 | 3,030 | 395.40 | 2,060 | 353.20 |
| 80–84 | 294,840 | 473.90 | 276,240 | 479.70 | 10,280 | 387.40 | 6,980 | 370.00 |
| 85–89 | 96,650 | 509.40 | 91,060 | 515.20 | 3,120 | 414.40 | 2,050 | 400.60 |
| 90–94 | 18,940 | 510.90 | 17,680 | 515.60 | 870 | 436.60 | 330 | 457.70 |
| 95 or older | 1,920 | 486.30 | 1,720 | 494.40 | 150 | 398.50 | 40 | 449.40 |
| <i>Husbands</i> | | | | | | | | |
| Subtotal | 39,680 | 254.30 | 24,430 | 261.40 | 4,880 | 271.20 | 10,180 | 229.10 |
| Under 62 | 1,890 | 145.60 | 1,390 | 149.20 | 220 | 141.30 | 280 | 131.00 |
| 62–64 | 1,820 | 210.70 | 1,030 | 196.80 | 300 | 216.70 | 490 | 236.30 |
| 65–69 | 9,120 | 262.40 | 5,680 | 263.40 | 1,110 | 281.10 | 2,330 | 251.20 |
| 70–74 | 10,770 | 268.20 | 6,230 | 279.40 | 1,460 | 295.80 | 3,060 | 232.30 |
| 75–79 | 8,620 | 253.80 | 5,330 | 266.30 | 870 | 288.80 | 2,360 | 212.30 |
| 80–84 | 4,540 | 256.30 | 2,740 | 272.90 | 620 | 249.60 | 1,120 | 221.20 |
| 85–89 | 1,840 | 260.50 | 1,250 | 264.20 | 190 | 281.90 | 380 | 236.20 |
| 90 or older | 1,080 | 295.30 | 780 | 310.10 | 110 | 217.40 | 160 | 284.30 |

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.3—Number and average monthly benefit for spouses, by marital status, basis of entitlement, age, and race, December 2003—Continued

| Basis of entitlement and age | All races ^a | | White | | Black | | Other ^b | |
|-----------------------------------|------------------------|-----------------------------------|-----------|-----------------------------------|---------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| <i>Spouses of retired workers</i> | | | | | | | | |
| Total | 2,622,130 | 463.60 | 2,378,990 | 474.50 | 123,750 | 383.80 | 112,400 | 323.90 |
| <i>Wives</i> | | | | | | | | |
| Subtotal | 2,586,710 | 466.30 | 2,357,320 | 476.40 | 119,630 | 387.20 | 102,950 | 332.20 |
| By basis of entitlement | | | | | | | | |
| Care of children | 51,520 | 378.40 | 40,560 | 398.50 | 6,120 | 339.10 | 4,750 | 260.40 |
| Under 35 | 1,600 | 327.20 | 1,210 | 348.70 | 190 | 262.40 | 190 | 265.70 |
| 35–39 | 3,420 | 321.80 | 2,690 | 337.90 | 440 | 272.90 | 290 | 247.10 |
| 40–44 | 6,960 | 335.30 | 5,280 | 357.10 | 1,010 | 313.60 | 660 | 196.60 |
| 45–49 | 9,450 | 374.10 | 7,100 | 392.60 | 1,300 | 350.20 | 1,040 | 279.20 |
| 50–54 | 10,150 | 379.60 | 8,120 | 395.80 | 1,060 | 360.60 | 960 | 264.80 |
| 55–59 | 8,670 | 383.30 | 6,800 | 410.80 | 870 | 328.40 | 950 | 245.90 |
| 60–61 | 4,540 | 436.20 | 3,700 | 454.30 | 570 | 378.10 | 270 | 310.70 |
| 62–64 | 6,730 | 422.80 | 5,660 | 436.80 | 680 | 367.60 | 390 | 315.10 |
| Age | 2,535,190 | 468.10 | 2,316,760 | 477.70 | 113,510 | 389.70 | 98,200 | 335.60 |
| 62–64 | 261,720 | 434.90 | 234,180 | 447.70 | 12,910 | 352.80 | 14,430 | 301.60 |
| 62 | 63,730 | 433.30 | 57,240 | 444.40 | 3,190 | 364.40 | 3,280 | 306.20 |
| 63 | 90,760 | 432.90 | 80,900 | 446.70 | 4,360 | 349.80 | 5,430 | 294.90 |
| 64 | 107,230 | 437.50 | 96,040 | 450.50 | 5,360 | 348.30 | 5,720 | 305.20 |
| 65–69 | 682,100 | 470.70 | 610,090 | 483.40 | 35,630 | 396.70 | 35,390 | 330.90 |
| 65 | 132,200 | 468.20 | 117,970 | 480.70 | 6,830 | 401.20 | 7,290 | 328.60 |
| 66 | 135,380 | 473.70 | 120,720 | 487.70 | 7,110 | 398.10 | 7,390 | 320.60 |
| 67 | 137,310 | 472.80 | 122,630 | 485.80 | 6,920 | 397.40 | 7,560 | 333.70 |
| 68 | 138,660 | 471.10 | 124,070 | 483.40 | 7,460 | 389.20 | 6,930 | 341.60 |
| 69 | 138,550 | 468.00 | 124,700 | 479.30 | 7,310 | 398.00 | 6,220 | 330.30 |
| 70–74 | 657,410 | 469.60 | 601,750 | 479.30 | 29,460 | 391.00 | 24,510 | 334.00 |
| 70 | 132,690 | 470.30 | 119,970 | 482.60 | 6,240 | 381.30 | 6,240 | 328.40 |
| 71 | 134,980 | 470.80 | 123,440 | 480.40 | 6,260 | 386.90 | 4,940 | 342.10 |
| 72 | 133,360 | 470.80 | 122,780 | 479.50 | 5,660 | 402.30 | 4,540 | 326.90 |
| 73 | 133,030 | 468.90 | 122,020 | 477.40 | 6,000 | 402.90 | 4,630 | 338.90 |
| 74 | 123,350 | 467.20 | 113,540 | 476.40 | 5,300 | 381.70 | 4,160 | 335.00 |
| 75–79 | 521,730 | 466.90 | 484,120 | 473.50 | 21,130 | 393.90 | 14,470 | 355.20 |
| 75 | 119,760 | 466.50 | 110,240 | 474.10 | 5,310 | 393.10 | 3,690 | 352.00 |
| 76 | 114,880 | 470.40 | 106,940 | 476.70 | 4,530 | 400.50 | 3,030 | 355.40 |
| 77 | 102,960 | 467.20 | 95,480 | 474.80 | 4,260 | 382.10 | 2,880 | 349.60 |
| 78 | 96,710 | 467.00 | 89,480 | 473.30 | 4,020 | 398.50 | 2,810 | 366.30 |
| 79 | 87,420 | 462.20 | 81,980 | 467.30 | 3,010 | 396.00 | 2,060 | 353.20 |
| 80–84 | 294,730 | 474.00 | 276,160 | 479.80 | 10,250 | 388.10 | 6,980 | 370.00 |
| 85–89 | 96,640 | 509.40 | 91,060 | 515.20 | 3,110 | 415.00 | 2,050 | 400.60 |
| 90–94 | 18,940 | 510.90 | 17,680 | 515.60 | 870 | 436.60 | 330 | 457.70 |
| 95 or older | 1,920 | 486.30 | 1,720 | 494.40 | 150 | 398.50 | 40 | 449.40 |
| By marital status | | | | | | | | |
| Nondivorced wives | 2,461,650 | 466.60 | 2,250,320 | 476.50 | 106,770 | 385.40 | 98,050 | 330.10 |
| Divorced wives | 125,060 | 461.40 | 107,000 | 472.60 | 12,860 | 401.40 | 4,900 | 374.00 |
| <i>Husbands</i> | | | | | | | | |
| Subtotal | 35,420 | 263.60 | 21,670 | 272.50 | 4,120 | 285.60 | 9,450 | 233.80 |

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.3—Number and average monthly benefit for spouses, by marital status, basis of entitlement, age, and race, December 2003—Continued

| Basis of entitlement and age | All races ^a | | White | | Black | | Other ^b | |
|------------------------------------|------------------------|-----------------------------------|---------|-----------------------------------|--------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| <i>Spouses of disabled workers</i> | | | | | | | | |
| Total | 151,500 | 219.90 | 113,830 | 230.40 | 18,490 | 196.80 | 18,660 | 179.50 |
| <i>Wives</i> | | | | | | | | |
| Subtotal | 147,240 | 221.10 | 111,070 | 231.80 | 17,730 | 196.90 | 17,930 | 180.00 |
| By basis of entitlement | | | | | | | | |
| Care of children | 95,230 | 182.10 | 67,260 | 192.10 | 13,040 | 163.90 | 14,510 | 152.90 |
| Under 35 | 17,920 | 125.90 | 12,650 | 132.90 | 2,340 | 107.90 | 2,860 | 109.60 |
| 35–39 | 18,670 | 149.70 | 13,090 | 160.20 | 2,350 | 124.90 | 3,160 | 124.80 |
| 40–44 | 22,430 | 179.40 | 15,810 | 187.40 | 2,920 | 157.60 | 3,580 | 163.50 |
| 45–49 | 18,790 | 208.90 | 13,210 | 219.90 | 2,730 | 188.90 | 2,780 | 176.70 |
| 50–54 | 10,480 | 236.20 | 7,280 | 249.40 | 1,640 | 217.80 | 1,490 | 194.40 |
| 55–59 | 5,460 | 260.10 | 4,120 | 268.70 | 770 | 233.20 | 550 | 235.30 |
| 60–61 | 960 | 319.30 | 700 | 343.50 | 190 | 275.90 | 70 | 194.30 |
| 62–64 | 520 | 266.80 | 400 | 279.10 | 100 | 259.30 | 20 | 59.50 |
| Age | 52,010 | 292.50 | 43,810 | 292.80 | 4,690 | 288.90 | 3,420 | 294.90 |
| 62–64 | 30,310 | 279.70 | 26,310 | 280.20 | 2,190 | 275.70 | 1,790 | 279.30 |
| 62 | 11,770 | 273.60 | 10,320 | 275.00 | 810 | 270.90 | 640 | 254.20 |
| 63 | 10,490 | 279.50 | 9,180 | 278.30 | 690 | 293.00 | 610 | 286.10 |
| 64 | 8,050 | 288.90 | 6,810 | 290.70 | 690 | 264.10 | 540 | 301.40 |
| 65–69 | 16,480 | 309.10 | 13,460 | 310.60 | 1,730 | 295.70 | 1,220 | 312.60 |
| 65 | 5,780 | 292.00 | 4,900 | 288.40 | 450 | 308.80 | 410 | 310.90 |
| 66 | 3,980 | 316.90 | 3,330 | 317.00 | 410 | 306.40 | 230 | 333.10 |
| 67 | 2,790 | 309.10 | 2,160 | 312.80 | 380 | 293.20 | 250 | 300.60 |
| 68 | 2,350 | 322.80 | 1,830 | 335.40 | 270 | 250.70 | 210 | 323.30 |
| 69 | 1,580 | 331.80 | 1,240 | 340.40 | 220 | 308.70 | 120 | 285.40 |
| 70–74 | 4,000 | 309.90 | 3,140 | 308.90 | 550 | 318.00 | 310 | 306.20 |
| 70 | 1,270 | 311.80 | 990 | 315.80 | 140 | 284.40 | 140 | 310.80 |
| 71 | 940 | 263.30 | 730 | 255.20 | 160 | 284.80 | 50 | 313.40 |
| 72 | 670 | 356.20 | 540 | 351.60 | 80 | 390.90 | 50 | 350.40 |
| 73 | 620 | 309.80 | 470 | 311.00 | 90 | 325.90 | 60 | 276.90 |
| 74 | 500 | 331.10 | 410 | 329.30 | 80 | 361.70 | 10 | 160.00 |
| 75 or older | 1,220 | 329.40 | 900 | 338.90 | 220 | 293.70 | 100 | 322.90 |
| By marital status | | | | | | | | |
| Nondivorced wives | 142,180 | 219.10 | 107,220 | 230.60 | 16,960 | 192.00 | 17,510 | 176.70 |
| Divorced wives | 5,060 | 276.70 | 3,850 | 266.00 | 770 | 306.50 | 420 | 316.20 |
| <i>Husbands</i> | | | | | | | | |
| Subtotal | 4,260 | 176.90 | 2,760 | 173.90 | 760 | 193.20 | 730 | 168.90 |

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.

- a. Includes 7,510 persons of unknown race.
- b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.4—Number and average monthly benefit for children, by type of benefit, age, and race, December 2003

| Age | All races ^a | | White | | Black | | Other ^b | |
|------------------------------------|------------------------|-----------------------------------|-----------|-----------------------------------|---------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| All children | | | | | | | | |
| Total | 3,966,480 | 444.80 | 2,618,820 | 475.60 | 842,050 | 386.40 | 482,490 | 378.70 |
| Under age 18 | 3,081,260 | 411.20 | 1,945,870 | 438.10 | 680,500 | 362.40 | 434,970 | 365.70 |
| Under 1 | 10,620 | 304.60 | 6,130 | 299.50 | 2,190 | 249.80 | 2,290 | 371.90 |
| 1 | 25,090 | 301.40 | 14,820 | 313.70 | 5,510 | 252.40 | 4,660 | 321.40 |
| 2 | 38,690 | 322.90 | 23,610 | 337.40 | 7,860 | 273.70 | 7,140 | 330.70 |
| 3 | 51,200 | 330.20 | 31,100 | 349.10 | 11,410 | 279.30 | 8,580 | 330.20 |
| 4 | 66,110 | 340.40 | 40,910 | 355.60 | 13,980 | 293.00 | 11,050 | 345.50 |
| 5 | 80,930 | 350.70 | 49,870 | 373.70 | 17,650 | 307.50 | 13,170 | 323.60 |
| 6 | 96,760 | 353.60 | 59,820 | 373.70 | 21,160 | 314.60 | 15,540 | 331.60 |
| 7 | 114,530 | 366.10 | 71,660 | 387.30 | 24,790 | 322.10 | 17,820 | 343.50 |
| 8 | 132,850 | 368.70 | 83,050 | 392.20 | 29,070 | 322.50 | 20,380 | 341.20 |
| 9 | 158,630 | 376.60 | 98,620 | 401.80 | 35,800 | 330.30 | 23,520 | 342.80 |
| 10 | 185,200 | 379.30 | 114,520 | 402.00 | 43,220 | 339.00 | 26,590 | 348.00 |
| 11 | 215,540 | 388.10 | 134,860 | 416.70 | 48,390 | 338.80 | 31,090 | 342.00 |
| 12 | 244,810 | 395.70 | 152,320 | 421.10 | 56,120 | 355.30 | 34,570 | 350.40 |
| 13 | 280,050 | 411.00 | 175,000 | 437.30 | 63,940 | 365.90 | 38,910 | 364.80 |
| 14 | 305,020 | 421.20 | 193,560 | 448.30 | 68,610 | 373.80 | 40,490 | 369.00 |
| 15 | 333,860 | 436.80 | 214,340 | 466.20 | 73,280 | 385.00 | 43,200 | 376.40 |
| 16 | 354,920 | 464.50 | 228,780 | 493.30 | 76,470 | 412.30 | 46,470 | 405.80 |
| 17 | 386,450 | 481.10 | 252,900 | 510.90 | 81,050 | 422.20 | 49,500 | 422.10 |
| Disabled adult children | 757,200 | 567.10 | 588,140 | 587.70 | 133,230 | 492.50 | 33,840 | 502.50 |
| 18–19 | 12,960 | 463.20 | 8,840 | 485.20 | 2,860 | 398.90 | 1,170 | 456.80 |
| 20–24 | 58,290 | 485.20 | 36,990 | 505.60 | 15,150 | 441.40 | 5,710 | 468.70 |
| 25–29 | 62,260 | 519.30 | 41,860 | 541.90 | 15,390 | 470.80 | 4,660 | 464.30 |
| 30–34 | 75,800 | 553.40 | 54,110 | 569.70 | 16,680 | 513.80 | 4,700 | 506.50 |
| 35–39 | 95,550 | 574.10 | 71,250 | 594.80 | 19,250 | 513.20 | 4,860 | 513.90 |
| 40–44 | 109,920 | 589.30 | 85,980 | 608.80 | 19,700 | 516.90 | 4,090 | 526.70 |
| 45–49 | 100,320 | 599.00 | 80,280 | 622.40 | 16,650 | 503.40 | 3,190 | 508.60 |
| 50–54 | 77,020 | 603.00 | 63,940 | 622.60 | 10,750 | 500.50 | 2,230 | 536.70 |
| 55–59 | 57,700 | 604.30 | 49,510 | 619.10 | 6,790 | 502.50 | 1,350 | 569.10 |
| 60–64 | 40,340 | 600.00 | 35,210 | 612.10 | 4,140 | 502.70 | 910 | 563.00 |
| 65–69 | 27,180 | 561.90 | 23,770 | 572.80 | 2,840 | 474.80 | 550 | 539.80 |
| 70–74 | 18,360 | 536.80 | 16,730 | 544.30 | 1,410 | 457.00 | 210 | 485.50 |
| 75–79 | 12,600 | 497.30 | 11,540 | 503.70 | 920 | 416.30 | 140 | 503.40 |
| 80 or older | 8,900 | 472.80 | 8,130 | 480.10 | 700 | 391.20 | 70 | 435.70 |
| Students, aged 18–19 | 128,020 | 531.50 | 84,810 | 559.70 | 28,320 | 465.00 | 13,680 | 485.30 |
| 18 | 118,590 | 531.30 | 79,140 | 558.80 | 25,530 | 463.30 | 12,750 | 487.40 |
| 19 | 9,430 | 533.90 | 5,670 | 572.70 | 2,790 | 480.90 | 930 | 456.90 |
| Children of retired workers | | | | | | | | |
| Subtotal | 480,490 | 445.50 | 350,110 | 471.70 | 96,830 | 395.40 | 32,750 | 316.30 |
| Under age 18 | 273,330 | 416.90 | 180,130 | 444.70 | 68,090 | 386.50 | 24,700 | 300.10 |
| Under 1 | 730 | 395.20 | 460 | 426.30 | 240 | 337.50 | 30 | 381.70 |
| 1 | 1,130 | 385.70 | 770 | 392.50 | 260 | 402.20 | 100 | 291.10 |
| 2 | 1,790 | 377.50 | 1,160 | 399.50 | 390 | 387.00 | 240 | 255.70 |
| 3 | 2,740 | 386.60 | 1,730 | 400.40 | 720 | 382.90 | 280 | 319.70 |
| 4 | 3,370 | 370.20 | 2,210 | 385.90 | 780 | 370.10 | 380 | 278.90 |
| 5 | 4,960 | 365.00 | 3,010 | 388.10 | 1,380 | 347.30 | 570 | 285.70 |
| 6 | 6,300 | 367.10 | 4,150 | 392.70 | 1,470 | 358.20 | 650 | 228.50 |
| 7 | 7,780 | 391.60 | 4,780 | 412.90 | 2,290 | 383.60 | 700 | 277.20 |
| 8 | 9,170 | 391.00 | 5,540 | 409.80 | 2,790 | 388.50 | 840 | 275.50 |
| 9 | 11,710 | 392.60 | 7,270 | 414.90 | 3,360 | 389.60 | 1,050 | 254.40 |
| 10 | 13,560 | 377.90 | 8,580 | 397.60 | 3,740 | 366.70 | 1,230 | 277.20 |
| 11 | 17,680 | 384.20 | 11,260 | 414.50 | 4,790 | 357.20 | 1,620 | 255.20 |
| 12 | 20,730 | 400.10 | 13,670 | 423.80 | 5,360 | 375.20 | 1,620 | 289.70 |
| 13 | 25,270 | 406.00 | 16,310 | 440.00 | 6,880 | 360.60 | 2,020 | 290.00 |
| 14 | 29,880 | 407.60 | 19,840 | 432.10 | 7,460 | 382.00 | 2,550 | 291.60 |
| 15 | 34,220 | 417.30 | 23,080 | 443.80 | 7,830 | 390.80 | 3,260 | 296.60 |
| 16 | 37,930 | 452.60 | 25,860 | 482.10 | 8,540 | 413.90 | 3,470 | 329.00 |
| 17 | 44,380 | 468.40 | 30,450 | 499.50 | 9,810 | 419.90 | 4,090 | 354.40 |

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.4—Number and average monthly benefit for children, by type of benefit, age, and race, December 2003—Continued

| Age | All races ^a | | White | | Black | | Other ^b | |
|--|------------------------|-----------------------------------|-----------|-----------------------------------|---------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| <i>Children of retired workers (cont.)</i> | | | | | | | | |
| Disabled adult children | 192,750 | 481.40 | 159,730 | 497.60 | 25,620 | 413.00 | 7,030 | 365.70 |
| 18–19 | 2,210 | 447.50 | 1,700 | 460.40 | 380 | 407.50 | 130 | 395.80 |
| 20–24 | 9,980 | 441.30 | 6,950 | 471.70 | 2,250 | 388.20 | 740 | 314.30 |
| 25–29 | 14,780 | 456.20 | 11,330 | 478.00 | 2,640 | 403.60 | 780 | 317.80 |
| 30–34 | 24,180 | 475.10 | 19,540 | 490.10 | 3,300 | 407.20 | 1,300 | 429.40 |
| 35–39 | 35,880 | 492.50 | 29,820 | 509.60 | 4,690 | 420.70 | 1,310 | 360.90 |
| 40–44 | 44,560 | 500.80 | 37,850 | 515.20 | 5,500 | 429.30 | 1,160 | 375.50 |
| 45–49 | 32,630 | 483.80 | 27,840 | 497.80 | 3,820 | 412.60 | 870 | 346.60 |
| 50–54 | 17,450 | 478.00 | 14,970 | 489.20 | 1,960 | 417.70 | 500 | 376.50 |
| 55–59 | 7,320 | 454.80 | 6,410 | 465.80 | 740 | 373.50 | 150 | 310.70 |
| 60–64 | 2,720 | 468.50 | 2,420 | 475.80 | 250 | 427.40 | 40 | 377.30 |
| 65–69 | 720 | 459.30 | 630 | 470.60 | 50 | 335.20 | 40 | 437.50 |
| 70 or older | 320 | 386.30 | 270 | 392.90 | 40 | 345.90 | 10 | 368.00 |
| Students, aged 18–19 | 14,410 | 509.20 | 10,250 | 543.20 | 3,120 | 445.00 | 1,020 | 367.70 |
| 18 | 13,490 | 512.00 | 9,740 | 545.60 | 2,780 | 446.40 | 950 | 363.70 |
| 19 | 920 | 467.60 | 510 | 496.80 | 340 | 433.30 | 70 | 421.60 |
| <i>Children of deceased workers</i> | | | | | | | | |
| Subtotal | 1,906,680 | 602.70 | 1,234,420 | 650.50 | 418,120 | 505.20 | 240,480 | 527.80 |
| Under age 18 | 1,339,820 | 590.90 | 807,480 | 648.00 | 309,700 | 491.70 | 211,070 | 518.80 |
| Under 1 | 2,170 | 606.70 | 870 | 665.30 | 330 | 486.40 | 970 | 595.00 |
| 1 | 6,310 | 565.60 | 3,110 | 626.30 | 1,320 | 450.70 | 1,880 | 545.80 |
| 2 | 12,410 | 557.90 | 6,810 | 618.40 | 2,500 | 430.50 | 3,100 | 527.80 |
| 3 | 16,840 | 553.60 | 9,360 | 612.50 | 3,580 | 459.90 | 3,890 | 497.80 |
| 4 | 23,970 | 555.90 | 13,550 | 611.30 | 5,170 | 455.40 | 5,240 | 511.90 |
| 5 | 31,100 | 559.20 | 18,030 | 624.50 | 7,090 | 451.80 | 5,970 | 488.70 |
| 6 | 37,620 | 556.60 | 21,660 | 615.50 | 8,720 | 456.30 | 7,200 | 502.20 |
| 7 | 46,030 | 568.50 | 27,360 | 624.00 | 10,270 | 465.20 | 8,380 | 514.40 |
| 8 | 54,160 | 560.10 | 32,010 | 619.20 | 12,350 | 453.30 | 9,750 | 502.40 |
| 9 | 66,610 | 565.00 | 39,520 | 625.20 | 15,650 | 454.20 | 11,250 | 508.20 |
| 10 | 79,920 | 558.40 | 46,720 | 615.20 | 19,650 | 463.60 | 13,100 | 499.90 |
| 11 | 94,810 | 564.90 | 57,070 | 626.70 | 22,170 | 453.90 | 14,870 | 496.90 |
| 12 | 108,540 | 567.60 | 63,600 | 625.90 | 26,930 | 477.00 | 17,060 | 496.50 |
| 13 | 125,740 | 586.50 | 74,720 | 644.50 | 30,440 | 491.20 | 19,230 | 513.50 |
| 14 | 137,950 | 592.00 | 83,740 | 648.60 | 32,460 | 495.20 | 20,160 | 513.60 |
| 15 | 151,760 | 609.00 | 93,920 | 665.70 | 34,920 | 509.40 | 20,930 | 525.30 |
| 16 | 164,140 | 624.40 | 101,380 | 677.30 | 37,180 | 531.60 | 23,400 | 544.60 |
| 17 | 179,740 | 637.70 | 114,050 | 686.90 | 38,970 | 543.30 | 24,690 | 558.90 |
| Disabled adult children | 500,970 | 626.30 | 385,120 | 648.80 | 92,910 | 541.60 | 21,710 | 587.90 |
| 18–19 | 5,870 | 603.10 | 3,850 | 642.00 | 1,380 | 505.50 | 610 | 577.20 |
| 20–24 | 27,660 | 615.50 | 16,320 | 654.00 | 7,990 | 543.30 | 3,090 | 599.30 |
| 25–29 | 31,060 | 631.90 | 19,610 | 666.50 | 8,650 | 563.00 | 2,560 | 587.90 |
| 30–34 | 39,570 | 651.60 | 25,950 | 686.00 | 10,910 | 584.40 | 2,520 | 590.20 |
| 35–39 | 52,610 | 652.60 | 36,390 | 688.10 | 13,030 | 564.10 | 3,090 | 607.30 |
| 40–44 | 63,200 | 657.10 | 46,570 | 690.80 | 13,730 | 555.30 | 2,800 | 593.80 |
| 45–49 | 67,470 | 655.60 | 52,340 | 689.20 | 12,710 | 532.40 | 2,320 | 569.30 |
| 50–54 | 59,530 | 639.80 | 48,930 | 663.70 | 8,790 | 518.90 | 1,730 | 583.00 |
| 55–59 | 50,380 | 626.10 | 43,100 | 641.90 | 6,050 | 518.30 | 1,200 | 601.30 |
| 60–64 | 37,620 | 609.50 | 32,790 | 622.20 | 3,890 | 507.60 | 870 | 571.60 |
| 65–69 | 26,460 | 564.70 | 23,140 | 575.60 | 2,790 | 477.30 | 510 | 547.90 |
| 70–74 | 18,140 | 538.80 | 16,550 | 546.10 | 1,380 | 459.20 | 200 | 491.40 |
| 75–79 | 12,570 | 497.60 | 11,520 | 503.80 | 910 | 417.40 | 140 | 503.40 |
| 80 or older | 8,830 | 473.10 | 8,060 | 480.60 | 700 | 391.20 | 70 | 435.70 |
| Students, aged 18–19 | 65,890 | 664.10 | 41,820 | 713.40 | 15,510 | 557.60 | 7,700 | 605.00 |
| 18 | 60,680 | 665.40 | 38,780 | 713.70 | 13,900 | 557.10 | 7,180 | 607.70 |
| 19 | 5,210 | 648.50 | 3,040 | 710.20 | 1,610 | 561.20 | 520 | 568.00 |

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.4—Number and average monthly benefit for children, by type of benefit, age, and race, December 2003—Continued

| Age | All races ^a | | White | | Black | | Other ^b | |
|-------------------------------------|------------------------|-----------------------------------|-----------|-----------------------------------|---------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| <i>Children of disabled workers</i> | | | | | | | | |
| Subtotal | 1,579,310 | 253.90 | 1,034,290 | 268.20 | 327,100 | 232.00 | 209,260 | 217.10 |
| Under age 18 | 1,468,110 | 246.10 | 958,260 | 259.90 | 302,710 | 224.80 | 199,200 | 211.60 |
| Under 1 | 7,720 | 211.20 | 4,800 | 221.10 | 1,620 | 188.60 | 1,290 | 204.00 |
| 1 | 17,650 | 201.50 | 10,940 | 219.30 | 3,930 | 175.90 | 2,680 | 165.20 |
| 2 | 24,490 | 199.90 | 15,640 | 210.40 | 4,970 | 185.90 | 3,800 | 174.60 |
| 3 | 31,620 | 206.30 | 20,010 | 221.50 | 7,110 | 177.90 | 4,410 | 183.00 |
| 4 | 38,770 | 204.50 | 25,150 | 215.10 | 8,030 | 181.00 | 5,430 | 189.60 |
| 5 | 44,870 | 204.60 | 28,830 | 215.30 | 9,180 | 190.10 | 6,630 | 178.20 |
| 6 | 52,840 | 207.50 | 34,010 | 217.40 | 10,970 | 196.10 | 7,690 | 180.50 |
| 7 | 60,720 | 209.30 | 39,520 | 220.40 | 12,230 | 190.50 | 8,740 | 185.00 |
| 8 | 69,520 | 216.60 | 45,500 | 230.50 | 13,930 | 193.20 | 9,790 | 186.30 |
| 9 | 80,310 | 217.90 | 51,830 | 229.70 | 16,790 | 202.90 | 11,220 | 185.10 |
| 10 | 91,720 | 223.40 | 59,220 | 234.50 | 19,830 | 210.40 | 12,260 | 192.80 |
| 11 | 103,050 | 226.10 | 66,530 | 236.90 | 21,430 | 215.60 | 14,600 | 193.80 |
| 12 | 115,540 | 233.40 | 75,050 | 247.00 | 23,830 | 213.20 | 15,890 | 199.60 |
| 13 | 129,040 | 240.90 | 83,970 | 252.30 | 26,620 | 224.00 | 17,660 | 211.40 |
| 14 | 137,190 | 252.40 | 89,980 | 265.40 | 28,690 | 234.30 | 17,780 | 216.10 |
| 15 | 147,880 | 264.60 | 97,340 | 279.00 | 30,530 | 241.40 | 19,010 | 226.20 |
| 16 | 152,850 | 295.70 | 101,540 | 312.40 | 30,750 | 267.70 | 19,600 | 253.70 |
| 17 | 162,330 | 311.20 | 108,400 | 328.80 | 32,270 | 276.60 | 20,720 | 272.40 |
| Disabled adult children | 63,480 | 359.70 | 43,290 | 376.60 | 14,700 | 320.70 | 5,100 | 327.90 |
| 18–19 | 4,880 | 301.90 | 3,290 | 314.50 | 1,100 | 262.30 | 430 | 304.40 |
| 20–24 | 20,650 | 331.90 | 13,720 | 346.30 | 4,910 | 299.80 | 1,880 | 314.70 |
| 25–29 | 16,420 | 362.90 | 10,920 | 384.60 | 4,100 | 319.80 | 1,320 | 311.10 |
| 30–34 | 12,050 | 387.80 | 8,620 | 400.00 | 2,470 | 344.00 | 880 | 380.50 |
| 35–39 | 7,060 | 404.40 | 5,040 | 424.70 | 1,530 | 363.10 | 460 | 322.50 |
| 40 or older | 2,420 | 421.80 | 1,700 | 428.50 | 590 | 400.80 | 130 | 429.50 |
| Students, aged 18–19 | 47,720 | 355.30 | 32,740 | 368.50 | 9,690 | 323.30 | 4,960 | 323.70 |
| 18 | 44,420 | 354.10 | 30,620 | 366.80 | 8,850 | 321.10 | 4,620 | 325.80 |
| 19 | 3,300 | 371.40 | 2,120 | 393.80 | 840 | 346.20 | 340 | 294.40 |

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.

- a. Includes 23,120 persons of unknown race.
- b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those groups is not available.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.5—Number and average monthly benefit for widowed mothers and fathers, by age, sex, marital status, and race, December 2003

| Age, sex, and marital status | All races ^a | | White | | Black | | Other ^b | |
|---------------------------------|------------------------|-----------------------------------|---------|-----------------------------------|--------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| All widowed mothers and fathers | 188,320 | 659.70 | 128,940 | 706.50 | 28,640 | 565.90 | 29,260 | 548.60 |
| By age | | | | | | | | |
| Under 20 | 90 | 386.00 | 40 | 392.00 | 0 | ... | 50 | 381.20 |
| 20–24 | 2,620 | 520.50 | 1,580 | 546.10 | 260 | 430.70 | 780 | 498.50 |
| 20 | 160 | 533.00 | 80 | 588.10 | 10 | 583.00 | 70 | 462.90 |
| 21 | 320 | 479.90 | 180 | 480.20 | 10 | 392.00 | 130 | 486.20 |
| 22 | 410 | 517.10 | 270 | 532.60 | 20 | 193.50 | 120 | 536.30 |
| 23 | 720 | 548.70 | 450 | 590.90 | 60 | 454.20 | 210 | 485.40 |
| 24 | 1,010 | 512.60 | 600 | 532.80 | 160 | 444.50 | 250 | 507.60 |
| 25–29 | 9,040 | 539.00 | 5,910 | 573.70 | 1,130 | 428.80 | 1,980 | 501.10 |
| 25 | 1,150 | 545.00 | 690 | 599.00 | 160 | 368.40 | 300 | 514.90 |
| 26 | 1,420 | 488.10 | 950 | 536.00 | 150 | 413.90 | 310 | 386.40 |
| 27 | 1,880 | 549.60 | 1,180 | 576.50 | 260 | 458.10 | 440 | 531.60 |
| 28 | 2,220 | 544.40 | 1,540 | 571.80 | 290 | 420.00 | 390 | 528.80 |
| 29 | 2,370 | 553.30 | 1,550 | 585.30 | 270 | 454.30 | 540 | 514.40 |
| 30–34 | 20,960 | 560.30 | 13,890 | 598.00 | 3,150 | 471.50 | 3,740 | 497.60 |
| 30 | 2,790 | 560.40 | 1,900 | 594.50 | 380 | 512.20 | 490 | 472.10 |
| 31 | 3,460 | 535.50 | 2,100 | 568.10 | 640 | 480.10 | 660 | 487.30 |
| 32 | 4,230 | 568.80 | 2,850 | 607.00 | 670 | 478.90 | 700 | 502.00 |
| 33 | 5,080 | 555.80 | 3,350 | 594.20 | 740 | 456.90 | 950 | 499.70 |
| 34 | 5,400 | 573.60 | 3,690 | 613.20 | 720 | 450.50 | 940 | 512.80 |
| 35–39 | 33,760 | 611.20 | 22,710 | 660.80 | 4,840 | 522.50 | 5,960 | 500.00 |
| 35 | 5,460 | 595.20 | 3,600 | 644.60 | 780 | 507.10 | 1,030 | 489.70 |
| 36 | 6,470 | 592.00 | 4,170 | 638.10 | 1,090 | 500.00 | 1,170 | 519.90 |
| 37 | 7,060 | 612.00 | 4,900 | 646.00 | 920 | 503.90 | 1,220 | 556.20 |
| 38 | 7,040 | 602.40 | 4,660 | 660.50 | 980 | 525.20 | 1,350 | 464.40 |
| 39 | 7,730 | 645.90 | 5,380 | 702.80 | 1,070 | 569.90 | 1,190 | 472.00 |
| 40–44 | 43,630 | 676.10 | 30,260 | 725.90 | 6,320 | 565.70 | 6,760 | 559.20 |
| 40 | 8,360 | 650.10 | 5,780 | 696.50 | 1,300 | 539.70 | 1,220 | 552.60 |
| 41 | 8,690 | 657.10 | 5,850 | 709.40 | 1,300 | 532.30 | 1,480 | 561.90 |
| 42 | 8,850 | 682.50 | 6,280 | 733.10 | 1,190 | 584.00 | 1,350 | 532.80 |
| 43 | 9,070 | 687.50 | 6,220 | 732.40 | 1,310 | 610.90 | 1,450 | 568.70 |
| 44 | 8,660 | 701.90 | 6,130 | 755.60 | 1,220 | 562.80 | 1,260 | 579.70 |
| 45–49 | 36,800 | 714.60 | 25,500 | 765.60 | 5,550 | 612.20 | 5,410 | 583.30 |
| 45 | 7,990 | 708.20 | 5,640 | 754.90 | 1,100 | 581.30 | 1,140 | 612.20 |
| 46 | 8,160 | 708.80 | 5,680 | 763.80 | 1,180 | 609.20 | 1,260 | 562.50 |
| 47 | 7,800 | 712.60 | 5,220 | 769.60 | 1,310 | 612.30 | 1,190 | 581.10 |
| 48 | 6,840 | 729.90 | 4,760 | 774.70 | 1,030 | 638.80 | 1,000 | 606.20 |
| 49 | 6,010 | 716.30 | 4,200 | 767.00 | 930 | 622.90 | 820 | 550.30 |
| 50–54 | 20,970 | 716.90 | 14,200 | 759.90 | 3,450 | 623.80 | 3,020 | 620.60 |
| 50 | 5,170 | 710.30 | 3,570 | 765.90 | 870 | 557.10 | 680 | 607.40 |
| 51 | 4,960 | 726.70 | 3,460 | 747.40 | 660 | 665.10 | 740 | 672.70 |
| 52 | 4,220 | 697.90 | 2,950 | 751.50 | 680 | 622.70 | 530 | 521.50 |
| 53 | 3,550 | 727.90 | 2,280 | 763.40 | 590 | 668.20 | 640 | 660.50 |
| 54 | 3,070 | 725.50 | 1,940 | 780.00 | 650 | 631.80 | 430 | 614.50 |
| 55–59 | 11,200 | 731.30 | 8,140 | 764.80 | 2,050 | 635.30 | 940 | 664.50 |
| 55 | 2,740 | 755.50 | 1,880 | 793.30 | 530 | 643.60 | 310 | 723.30 |
| 56 | 2,610 | 748.60 | 1,950 | 766.70 | 500 | 702.20 | 150 | 678.50 |
| 57 | 2,360 | 704.20 | 1,830 | 750.40 | 320 | 520.90 | 190 | 594.10 |
| 58 | 1,810 | 716.90 | 1,240 | 748.80 | 370 | 641.90 | 190 | 683.50 |
| 59 | 1,680 | 719.00 | 1,240 | 755.80 | 330 | 623.90 | 100 | 558.40 |
| 60–61 | 3,650 | 725.50 | 2,700 | 738.00 | 700 | 681.40 | 240 | 702.90 |
| 60 | 1,680 | 744.50 | 1,280 | 761.60 | 280 | 699.10 | 120 | 668.40 |
| 61 | 1,970 | 709.30 | 1,420 | 716.80 | 420 | 669.60 | 120 | 737.50 |
| 62 or older | 5,600 | 700.50 | 4,010 | 750.90 | 1,190 | 582.00 | 380 | 547.10 |

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.5—Number and average monthly benefit for widowed mothers and fathers, by age, sex, marital status, and race, December 2003—Continued

| Age, sex, and marital status | All races ^a | | White | | Black | | Other ^b | |
|----------------------------------|------------------------|-----------------------------------|---------|-----------------------------------|--------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| By sex and marital status | | | | | | | | |
| Women | 176,540 | 665.40 | 121,110 | 714.10 | 26,590 | 565.60 | 27,410 | 549.80 |
| Mothers | 159,730 | 666.50 | 108,310 | 717.50 | 24,700 | 564.40 | 25,380 | 550.90 |
| Surviving divorced mothers | 16,810 | 654.40 | 12,800 | 685.30 | 1,890 | 581.60 | 2,030 | 536.60 |
| Men | 11,780 | 575.50 | 7,830 | 588.00 | 2,050 | 569.90 | 1,850 | 530.50 |

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

- a. Includes 1,480 persons of unknown race.
- b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.6—Number and average monthly benefit for nondisabled widow(er)s, by sex, age, marital status, and race, December 2003

| Age, sex, and marital status | All races ^a | | White | | Black | | Other ^b | |
|--|------------------------|-----------------------------------|-----------|-----------------------------------|---------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| All nondisabled widow(er)s | 4,499,900 | 888.30 | 3,909,940 | 910.20 | 386,790 | 709.70 | 190,980 | 800.90 |
| Women | | | | | | | | |
| Subtotal | 4,458,120 | 890.10 | 3,881,710 | 911.60 | 380,760 | 710.10 | 183,540 | 805.60 |
| <i>By age</i> | | | | | | | | |
| 60–61 | 130,540 | 885.20 | 71,620 | 918.30 | 9,610 | 742.70 | 49,250 | 865.10 |
| 60 | 53,430 | 894.30 | 18,240 | 946.20 | 2,300 | 737.10 | 32,870 | 876.60 |
| 61 | 77,110 | 878.90 | 53,380 | 908.80 | 7,310 | 744.50 | 16,380 | 842.00 |
| 62–64 | 300,930 | 873.80 | 235,690 | 893.50 | 32,600 | 740.10 | 32,410 | 866.80 |
| 62 | 89,660 | 881.30 | 65,620 | 897.90 | 9,010 | 735.30 | 14,980 | 896.70 |
| 63 | 102,770 | 876.40 | 81,480 | 896.30 | 11,940 | 753.40 | 9,270 | 863.20 |
| 64 | 108,500 | 865.10 | 88,590 | 887.60 | 11,650 | 730.10 | 8,160 | 816.10 |
| 65–69 | 646,870 | 894.40 | 543,170 | 918.10 | 70,450 | 736.80 | 31,830 | 842.80 |
| 65 | 127,670 | 892.00 | 100,550 | 904.30 | 13,700 | 727.30 | 13,250 | 969.80 |
| 66 | 122,750 | 902.10 | 103,760 | 929.30 | 13,350 | 748.90 | 5,400 | 767.30 |
| 67 | 128,880 | 893.90 | 109,240 | 922.60 | 14,300 | 727.50 | 4,930 | 749.90 |
| 68 | 132,610 | 889.60 | 113,380 | 914.70 | 14,630 | 733.00 | 4,300 | 765.70 |
| 69 | 134,960 | 894.70 | 116,240 | 919.10 | 14,470 | 747.80 | 3,950 | 719.70 |
| 70–74 | 695,030 | 888.70 | 601,410 | 915.70 | 71,340 | 713.70 | 20,080 | 708.60 |
| 70 | 122,370 | 884.70 | 104,690 | 914.70 | 13,330 | 707.90 | 4,000 | 697.60 |
| 71 | 131,860 | 884.90 | 112,770 | 914.00 | 14,500 | 711.50 | 4,190 | 705.10 |
| 72 | 137,510 | 890.50 | 118,860 | 916.00 | 14,590 | 725.20 | 3,720 | 724.00 |
| 73 | 151,390 | 890.10 | 132,580 | 914.60 | 14,350 | 720.10 | 3,980 | 707.00 |
| 74 | 151,900 | 892.20 | 132,510 | 918.90 | 14,570 | 703.20 | 4,190 | 710.50 |
| 75–79 | 864,130 | 882.00 | 767,410 | 903.60 | 74,670 | 707.50 | 19,400 | 705.20 |
| 75 | 161,410 | 886.60 | 142,210 | 909.20 | 15,030 | 721.00 | 3,700 | 694.80 |
| 76 | 170,950 | 884.40 | 151,320 | 906.40 | 15,030 | 711.10 | 3,910 | 710.30 |
| 77 | 175,410 | 883.00 | 155,280 | 904.30 | 15,460 | 710.30 | 4,120 | 724.50 |
| 78 | 174,000 | 879.70 | 155,110 | 901.30 | 14,690 | 703.10 | 3,750 | 689.80 |
| 79 | 182,360 | 877.20 | 163,490 | 897.70 | 14,460 | 691.40 | 3,920 | 704.10 |
| 80–84 | 852,390 | 898.70 | 771,330 | 918.30 | 62,200 | 694.90 | 15,890 | 736.40 |
| 80 | 176,880 | 884.10 | 159,140 | 904.80 | 13,690 | 690.10 | 3,420 | 697.70 |
| 81 | 178,480 | 890.00 | 160,640 | 910.70 | 13,660 | 693.60 | 3,590 | 711.60 |
| 82 | 181,020 | 897.10 | 164,750 | 914.70 | 12,650 | 692.40 | 3,060 | 759.70 |
| 83 | 170,070 | 910.40 | 154,420 | 930.00 | 11,850 | 693.40 | 3,160 | 746.00 |
| 84 | 145,940 | 915.30 | 132,380 | 934.40 | 10,350 | 707.40 | 2,660 | 781.30 |
| 85–89 | 568,720 | 919.30 | 522,700 | 936.30 | 35,050 | 697.40 | 9,110 | 750.70 |
| 85 | 137,280 | 927.30 | 125,800 | 944.60 | 8,650 | 705.00 | 2,330 | 765.10 |
| 86 | 121,460 | 929.50 | 111,860 | 946.30 | 7,340 | 709.00 | 1,900 | 746.80 |
| 87 | 113,830 | 916.40 | 103,960 | 936.30 | 7,660 | 685.40 | 1,970 | 735.90 |
| 88 | 103,460 | 913.70 | 95,580 | 928.40 | 6,000 | 706.70 | 1,510 | 766.70 |
| 89 | 92,690 | 903.80 | 85,500 | 919.40 | 5,400 | 676.20 | 1,400 | 735.80 |
| 90–94 | 295,360 | 872.30 | 272,950 | 888.60 | 17,700 | 647.40 | 4,140 | 715.90 |
| 95 or older | 104,150 | 812.90 | 95,430 | 830.40 | 7,140 | 607.20 | 1,430 | 646.70 |
| <i>By marital status</i> | | | | | | | | |
| Widows | 4,137,320 | 888.90 | 3,621,600 | 910.70 | 343,970 | 703.90 | 160,330 | 790.60 |
| Surviving divorced wives (nondisabled) | 320,800 | 905.50 | 260,110 | 924.70 | 36,790 | 767.80 | 23,210 | 909.20 |

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.6—Number and average monthly benefit for nondisabled widow(er)s, by sex, age, marital status, and race, December 2003—Continued

| Age, sex, and marital status | All races ^a | | White | | Black | | Other ^b | |
|------------------------------|------------------------|-----------------------------------|--------|-----------------------------------|--------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| Men | | | | | | | | |
| Subtotal | 41,780 | 701.10 | 28,230 | 709.60 | 6,030 | 683.00 | 7,440 | 684.60 |
| 60–61 | 8,700 | 669.90 | 4,570 | 676.60 | 680 | 699.00 | 3,450 | 655.20 |
| 62–64 | 12,010 | 788.80 | 8,490 | 785.50 | 1,570 | 788.50 | 1,950 | 803.30 |
| 65–69 | 7,640 | 778.00 | 5,380 | 783.90 | 1,410 | 758.90 | 830 | 774.90 |
| 70–74 | 4,090 | 661.90 | 2,760 | 705.80 | 860 | 595.80 | 440 | 526.60 |
| 75–79 | 3,490 | 636.20 | 2,500 | 666.00 | 660 | 559.00 | 330 | 565.00 |
| 80–84 | 2,490 | 556.70 | 1,850 | 564.30 | 420 | 555.40 | 220 | 495.30 |
| 85–89 | 1,680 | 534.90 | 1,280 | 541.30 | 210 | 578.20 | 180 | 408.90 |
| 90 or older | 1,680 | 496.70 | 1,400 | 503.40 | 220 | 450.90 | 40 | 561.80 |

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.

- a. Includes 12,190 persons of unknown race.
- b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.A1.7—Number and average monthly benefit for disabled widow(er)s, by age, sex, marital status, and race, December 2003

| Age, sex, and marital status | All races ^a | | White | | Black | | Other ^b | |
|----------------------------------|------------------------|-----------------------------------|---------|-----------------------------------|--------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| All disabled widow(er)s | 207,630 | 562.30 | 143,390 | 577.80 | 39,080 | 499.70 | 24,520 | 571.60 |
| By age | | | | | | | | |
| 50–54 | 26,820 | 576.10 | 15,380 | 587.20 | 5,510 | 516.40 | 5,820 | 605.40 |
| 50 | 2,320 | 562.70 | 750 | 538.50 | 420 | 484.60 | 1,140 | 611.80 |
| 51 | 4,020 | 607.90 | 2,070 | 599.00 | 870 | 548.00 | 1,080 | 673.40 |
| 52 | 5,230 | 572.90 | 3,170 | 599.30 | 1,080 | 491.80 | 960 | 581.60 |
| 53 | 6,650 | 575.80 | 3,930 | 591.60 | 1,460 | 522.40 | 1,240 | 587.30 |
| 54 | 8,600 | 566.90 | 5,460 | 579.20 | 1,680 | 518.50 | 1,400 | 580.20 |
| 55–59 | 77,480 | 567.30 | 51,660 | 579.30 | 13,540 | 504.70 | 12,110 | 586.10 |
| 55 | 10,610 | 569.70 | 6,820 | 575.90 | 2,180 | 532.80 | 1,610 | 593.60 |
| 56 | 14,550 | 572.90 | 9,440 | 589.30 | 2,590 | 479.80 | 2,460 | 607.40 |
| 57 | 15,620 | 560.10 | 10,720 | 567.30 | 2,510 | 513.90 | 2,330 | 576.50 |
| 58 | 16,580 | 570.20 | 11,080 | 588.40 | 2,800 | 499.00 | 2,690 | 571.70 |
| 59 | 20,120 | 565.10 | 13,600 | 576.10 | 3,460 | 503.70 | 3,020 | 584.90 |
| 60–64 | 103,330 | 555.00 | 76,350 | 575.00 | 20,030 | 491.70 | 6,590 | 515.00 |
| 60 | 22,020 | 555.80 | 15,750 | 568.90 | 3,760 | 512.50 | 2,460 | 537.70 |
| 61 | 22,140 | 553.80 | 16,540 | 572.50 | 4,400 | 492.20 | 1,090 | 516.10 |
| 62 | 20,900 | 557.10 | 15,570 | 584.50 | 4,300 | 474.50 | 1,000 | 485.70 |
| 63 | 19,470 | 555.80 | 14,370 | 574.50 | 3,850 | 495.00 | 1,150 | 514.00 |
| 64 | 18,800 | 552.30 | 14,120 | 574.50 | 3,720 | 486.30 | 890 | 484.90 |
| By sex and marital status | | | | | | | | |
| Women | 201,390 | 567.40 | 139,530 | 583.30 | 37,730 | 502.20 | 23,510 | 578.00 |
| Widows | 172,760 | 566.70 | 119,210 | 584.40 | 32,900 | 496.80 | 20,130 | 577.30 |
| Surviving divorced wives | 28,630 | 571.30 | 20,320 | 576.90 | 4,830 | 539.00 | 3,380 | 582.10 |
| Men | 6,240 | 397.90 | 3,860 | 381.80 | 1,350 | 429.60 | 1,010 | 421.00 |

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.

- a. Includes 640 persons of unknown race.
- b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.
- c. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.8—Number and average monthly benefit for parents, by age, sex, and race, December 2003

| Age and sex | All races ^a | | White | | Black | | Other ^b | |
|---------------|------------------------|-----------------------------------|--------|-----------------------------------|--------|-----------------------------------|--------------------|-----------------------------------|
| | Number ^c | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| All parents | 2,190 | 803.10 | 1,190 | 830.40 | 240 | 827.50 | 710 | 761.20 |
| By age | | | | | | | | |
| 62–64 | 30 | 1,025.30 | 0 | ... | 10 | 1,113.00 | 20 | 981.50 |
| 65–69 | 150 | 826.40 | 50 | 1,001.50 | 20 | 850.80 | 70 | 725.90 |
| 70–74 | 330 | 896.70 | 140 | 929.30 | 30 | 1,164.90 | 160 | 817.90 |
| 75–79 | 400 | 821.40 | 180 | 867.30 | 30 | 1,043.40 | 170 | 720.20 |
| 80–84 | 440 | 747.10 | 310 | 768.90 | 30 | 817.90 | 90 | 678.50 |
| 85–89 | 430 | 872.10 | 210 | 964.60 | 50 | 760.70 | 170 | 790.60 |
| 90 or older | 410 | 672.90 | 300 | 703.00 | 70 | 594.90 | 30 | 709.30 |
| By sex | | | | | | | | |
| Women | 1,890 | 818.10 | 1,090 | 835.50 | 220 | 848.00 | 530 | 787.40 |
| Men | 300 | 708.90 | 100 | 774.50 | 20 | 602.50 | 180 | 684.20 |

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

- 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).

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, sex, age, and race, December 2003

| Age and type of benefit | All races ^a | | White | | Black | | Other ^b | |
|-------------------------|------------------------|-----------------------------------|------------|-----------------------------------|-----------|-----------------------------------|--------------------|-----------------------------------|
| | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| Retired workers | | | | | | | | |
| Total | 21,247,240 | 857.60 | 18,986,490 | 871.70 | 1,621,080 | 755.60 | 600,490 | 695.10 |
| 62–64 | 2,587,310 | 858.60 | 2,242,920 | 874.10 | 228,450 | 797.30 | 115,910 | 680.00 |
| 62 | 708,390 | 847.60 | 613,470 | 862.70 | 59,700 | 796.90 | 35,220 | 670.80 |
| 63 | 906,650 | 860.60 | 786,430 | 875.60 | 81,090 | 799.70 | 39,120 | 685.40 |
| 64 | 972,270 | 864.80 | 843,020 | 881.00 | 87,660 | 795.40 | 41,570 | 682.70 |
| 65–69 | 5,518,840 | 871.90 | 4,841,580 | 888.40 | 467,500 | 783.20 | 208,920 | 690.20 |
| 65 | 1,242,370 | 911.40 | 1,084,660 | 929.50 | 104,850 | 825.20 | 52,820 | 711.10 |
| 66 | 1,169,680 | 899.80 | 1,022,150 | 917.40 | 100,370 | 811.10 | 47,140 | 708.80 |
| 67 | 1,096,470 | 864.30 | 962,440 | 880.20 | 91,500 | 781.70 | 42,410 | 680.10 |
| 68 | 1,037,070 | 842.30 | 912,900 | 857.90 | 89,080 | 745.70 | 34,870 | 682.80 |
| 69 | 973,250 | 828.10 | 859,430 | 843.40 | 81,700 | 737.40 | 31,680 | 649.30 |
| 70–74 | 4,465,820 | 837.00 | 3,990,390 | 850.80 | 346,240 | 737.30 | 122,270 | 676.30 |
| 70 | 906,340 | 832.80 | 800,890 | 847.80 | 75,710 | 735.90 | 29,100 | 673.60 |
| 71 | 922,980 | 848.20 | 817,770 | 862.70 | 77,590 | 751.30 | 26,880 | 692.30 |
| 72 | 900,490 | 836.50 | 807,140 | 850.40 | 67,270 | 737.10 | 24,750 | 664.10 |
| 73 | 897,790 | 834.00 | 809,340 | 846.60 | 64,320 | 733.10 | 22,620 | 675.40 |
| 74 | 838,220 | 832.80 | 755,250 | 845.80 | 61,350 | 725.90 | 18,920 | 674.60 |
| 75–79 | 3,843,770 | 848.20 | 3,489,350 | 860.70 | 265,280 | 730.90 | 75,590 | 704.00 |
| 75 | 833,440 | 846.40 | 753,720 | 859.10 | 59,390 | 736.50 | 17,250 | 696.30 |
| 76 | 818,700 | 851.40 | 740,680 | 864.60 | 58,020 | 733.40 | 17,150 | 698.10 |
| 77 | 758,340 | 842.90 | 689,770 | 855.00 | 51,680 | 726.50 | 14,270 | 700.50 |
| 78 | 737,610 | 857.60 | 670,490 | 869.90 | 50,440 | 735.40 | 14,210 | 726.70 |
| 79 | 695,680 | 842.30 | 634,690 | 854.30 | 45,750 | 720.60 | 12,710 | 701.00 |
| 80–84 | 2,691,120 | 841.70 | 2,463,820 | 853.20 | 171,010 | 713.20 | 45,830 | 717.90 |
| 80 | 637,940 | 838.10 | 583,290 | 849.70 | 40,420 | 712.20 | 12,080 | 709.80 |
| 81 | 590,760 | 840.20 | 539,360 | 851.20 | 38,390 | 722.30 | 10,440 | 719.20 |
| 82 | 562,130 | 838.60 | 516,110 | 849.90 | 34,710 | 705.20 | 9,240 | 717.50 |
| 83 | 485,690 | 840.40 | 445,620 | 851.70 | 30,480 | 711.50 | 7,710 | 714.50 |
| 84 | 414,600 | 855.20 | 379,440 | 867.40 | 27,010 | 713.80 | 6,360 | 735.50 |
| 85–89 | 1,446,090 | 918.20 | 1,330,540 | 930.20 | 88,330 | 765.10 | 21,590 | 815.20 |
| 85 | 386,100 | 893.40 | 356,080 | 904.40 | 22,620 | 751.30 | 5,710 | 776.20 |
| 86 | 329,260 | 920.10 | 303,450 | 931.50 | 19,400 | 767.80 | 5,050 | 834.00 |
| 87 | 284,590 | 947.50 | 260,920 | 960.80 | 18,780 | 790.60 | 3,850 | 836.30 |
| 88 | 241,890 | 929.90 | 223,390 | 941.80 | 13,840 | 770.20 | 3,740 | 827.50 |
| 89 | 204,250 | 907.30 | 186,700 | 920.90 | 13,690 | 743.90 | 3,240 | 815.10 |
| 90–94 | 562,540 | 873.30 | 511,350 | 887.30 | 41,170 | 718.50 | 8,590 | 784.90 |
| 95 or older | 131,750 | 807.60 | 116,540 | 828.10 | 13,100 | 636.20 | 1,790 | 696.10 |
| Men | | | | | | | | |
| Subtotal | 10,540,940 | 957.70 | 9,438,360 | 976.20 | 769,360 | 820.40 | 317,730 | 748.70 |
| 62–64 | 1,331,110 | 1,022.50 | 1,150,820 | 1,051.90 | 119,510 | 872.90 | 60,760 | 762.00 |
| 62 | 359,570 | 1,018.50 | 310,740 | 1,047.70 | 31,730 | 871.70 | 17,100 | 760.70 |
| 63 | 468,100 | 1,024.20 | 404,470 | 1,053.40 | 42,140 | 876.90 | 21,480 | 763.30 |
| 64 | 503,440 | 1,023.90 | 435,610 | 1,053.40 | 45,640 | 869.90 | 22,180 | 761.70 |
| 65–69 | 2,928,080 | 1,009.90 | 2,569,240 | 1,036.10 | 241,930 | 857.90 | 116,310 | 748.60 |
| 65 | 656,960 | 1,068.40 | 573,390 | 1,098.60 | 53,940 | 906.30 | 29,600 | 780.10 |
| 66 | 620,770 | 1,048.20 | 542,190 | 1,077.10 | 52,480 | 890.80 | 26,090 | 765.00 |
| 67 | 582,490 | 998.20 | 510,200 | 1,024.20 | 48,160 | 855.00 | 24,030 | 735.00 |
| 68 | 550,310 | 968.70 | 485,560 | 992.00 | 45,350 | 817.30 | 19,220 | 739.80 |
| 69 | 517,550 | 946.80 | 457,900 | 969.60 | 42,000 | 801.70 | 17,370 | 699.10 |
| 70–74 | 2,374,040 | 941.00 | 2,131,900 | 959.40 | 173,700 | 798.50 | 64,790 | 729.80 |
| 70 | 482,190 | 945.20 | 427,480 | 967.00 | 38,560 | 796.40 | 15,730 | 723.20 |
| 71 | 490,410 | 962.30 | 436,540 | 982.30 | 39,290 | 817.10 | 14,170 | 756.10 |
| 72 | 480,160 | 939.10 | 432,510 | 957.10 | 33,630 | 797.50 | 13,230 | 723.70 |
| 73 | 479,320 | 931.60 | 434,390 | 948.00 | 32,250 | 791.20 | 11,820 | 720.90 |
| 74 | 441,960 | 925.40 | 400,980 | 941.10 | 29,970 | 785.80 | 9,840 | 721.30 |

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, sex, age, and race, December 2003—Continued

| Age and type of benefit | All races ^a | | White | | Black | | Other ^b | |
|-------------------------|------------------------|-----------------------------------|-----------|-----------------------------------|---------|-----------------------------------|--------------------|-----------------------------------|
| | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| <i>Men (cont.)</i> | | | | | | | | |
| 75-79 | 1,928,910 | 929.00 | 1,761,960 | 943.70 | 123,180 | 783.10 | 38,550 | 743.00 |
| 75 | 433,240 | 939.20 | 394,330 | 954.70 | 28,940 | 792.90 | 8,910 | 743.80 |
| 76 | 417,460 | 941.40 | 380,160 | 957.70 | 27,210 | 789.10 | 8,800 | 727.10 |
| 77 | 380,040 | 920.20 | 347,940 | 934.60 | 23,840 | 770.30 | 7,320 | 736.30 |
| 78 | 362,900 | 934.60 | 332,010 | 948.40 | 22,930 | 787.80 | 6,950 | 776.20 |
| 79 | 335,270 | 904.50 | 307,520 | 917.30 | 20,260 | 771.00 | 6,570 | 735.60 |
| 80-84 | 1,232,390 | 863.00 | 1,135,730 | 873.80 | 70,050 | 736.50 | 22,780 | 729.80 |
| 80 | 304,800 | 883.80 | 280,490 | 895.30 | 17,240 | 754.00 | 6,240 | 736.20 |
| 81 | 278,400 | 872.60 | 255,550 | 884.60 | 16,710 | 745.90 | 5,150 | 721.20 |
| 82 | 256,250 | 857.70 | 236,870 | 868.30 | 14,170 | 724.30 | 4,470 | 734.50 |
| 83 | 215,800 | 836.90 | 199,310 | 847.00 | 11,910 | 712.90 | 3,880 | 712.50 |
| 84 | 177,140 | 851.40 | 163,510 | 860.60 | 10,020 | 736.00 | 3,040 | 746.20 |
| 85-89 | 550,190 | 940.90 | 510,300 | 950.10 | 28,440 | 818.40 | 9,590 | 829.20 |
| 85 | 159,430 | 906.50 | 148,280 | 915.20 | 8,020 | 793.10 | 2,590 | 768.60 |
| 86 | 129,330 | 943.50 | 120,390 | 952.10 | 6,290 | 813.90 | 2,230 | 849.10 |
| 87 | 106,390 | 982.80 | 98,490 | 993.10 | 5,890 | 850.30 | 1,670 | 867.50 |
| 88 | 86,140 | 962.70 | 80,160 | 972.30 | 4,110 | 826.00 | 1,560 | 850.80 |
| 89 | 68,900 | 924.00 | 62,980 | 933.20 | 4,130 | 821.60 | 1,540 | 839.20 |
| 90-94 | 168,500 | 878.20 | 154,070 | 887.30 | 10,070 | 761.80 | 4,080 | 822.20 |
| 95 or older | 27,720 | 784.50 | 24,340 | 799.60 | 2,480 | 649.60 | 870 | 742.60 |
| <i>Women</i> | | | | | | | | |
| Subtotal | 10,706,300 | 759.10 | 9,548,130 | 768.30 | 851,720 | 697.10 | 282,760 | 634.90 |
| 62-64 | 1,256,200 | 684.90 | 1,092,100 | 686.80 | 108,940 | 714.40 | 55,150 | 589.70 |
| 62 | 348,820 | 671.50 | 302,730 | 672.80 | 27,970 | 712.10 | 18,120 | 586.00 |
| 63 | 438,550 | 686.00 | 381,960 | 687.40 | 38,950 | 716.10 | 17,640 | 590.50 |
| 64 | 468,830 | 693.90 | 407,410 | 696.60 | 42,020 | 714.40 | 19,390 | 592.40 |
| 65-69 | 2,590,760 | 716.00 | 2,272,340 | 721.30 | 225,570 | 703.00 | 92,610 | 616.80 |
| 65 | 585,410 | 735.30 | 511,270 | 740.00 | 50,910 | 739.30 | 23,220 | 623.00 |
| 66 | 548,910 | 732.00 | 479,960 | 736.90 | 47,890 | 723.70 | 21,050 | 639.10 |
| 67 | 513,980 | 712.40 | 452,240 | 717.80 | 43,340 | 700.30 | 18,380 | 608.30 |
| 68 | 486,760 | 699.40 | 427,340 | 705.50 | 43,730 | 671.40 | 15,650 | 612.80 |
| 69 | 455,700 | 693.40 | 401,530 | 699.60 | 39,700 | 669.40 | 14,310 | 588.90 |
| 70-74 | 2,091,780 | 718.90 | 1,858,490 | 726.20 | 172,540 | 675.70 | 57,480 | 616.00 |
| 70 | 424,150 | 705.00 | 373,410 | 711.50 | 37,150 | 673.20 | 13,370 | 615.30 |
| 71 | 432,570 | 718.90 | 381,230 | 725.80 | 38,300 | 683.80 | 12,710 | 621.30 |
| 72 | 420,330 | 719.40 | 374,630 | 727.20 | 33,640 | 676.70 | 11,520 | 595.60 |
| 73 | 418,470 | 722.20 | 374,950 | 729.20 | 32,070 | 674.70 | 10,800 | 625.60 |
| 74 | 396,260 | 729.40 | 354,270 | 737.80 | 31,380 | 668.70 | 9,080 | 624.00 |
| 75-79 | 1,914,860 | 766.80 | 1,727,390 | 776.00 | 142,100 | 685.70 | 37,040 | 663.40 |
| 75 | 400,200 | 746.00 | 359,390 | 754.10 | 30,450 | 683.00 | 8,340 | 645.60 |
| 76 | 401,240 | 757.70 | 360,520 | 766.40 | 30,810 | 684.20 | 8,350 | 667.60 |
| 77 | 378,300 | 765.30 | 341,830 | 773.90 | 27,840 | 689.00 | 6,950 | 662.90 |
| 78 | 374,710 | 783.00 | 338,480 | 793.00 | 27,510 | 691.80 | 7,260 | 679.20 |
| 79 | 360,410 | 784.60 | 327,170 | 795.10 | 25,490 | 680.50 | 6,140 | 664.00 |
| 80-84 | 1,458,730 | 823.80 | 1,328,090 | 835.50 | 100,960 | 697.00 | 23,050 | 706.10 |
| 80 | 333,140 | 796.40 | 302,800 | 807.40 | 23,180 | 681.20 | 5,840 | 681.60 |
| 81 | 312,360 | 811.30 | 283,810 | 821.20 | 21,680 | 704.10 | 5,290 | 717.30 |
| 82 | 305,880 | 822.60 | 279,240 | 834.30 | 20,540 | 692.10 | 4,770 | 701.60 |
| 83 | 269,890 | 843.30 | 246,310 | 855.50 | 18,570 | 710.70 | 3,830 | 716.50 |
| 84 | 237,460 | 858.10 | 215,930 | 872.60 | 16,990 | 700.70 | 3,320 | 725.80 |
| 85-89 | 895,900 | 904.30 | 820,240 | 917.80 | 59,890 | 739.70 | 12,000 | 804.00 |
| 85 | 226,670 | 884.20 | 207,800 | 896.60 | 14,600 | 728.30 | 3,120 | 782.60 |
| 86 | 199,930 | 905.00 | 183,060 | 917.90 | 13,110 | 745.70 | 2,820 | 822.10 |
| 87 | 178,200 | 926.50 | 162,430 | 941.20 | 12,890 | 763.30 | 2,180 | 812.40 |
| 88 | 155,750 | 911.80 | 143,230 | 924.80 | 9,730 | 746.60 | 2,180 | 810.90 |
| 89 | 135,350 | 898.80 | 123,720 | 914.70 | 9,560 | 710.30 | 1,700 | 793.40 |

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, sex, age, and race, December 2003—Continued

| Age and type of benefit | All races ^a | | White | | Black | | Other ^b | |
|-------------------------|------------------------|-----------------------------------|-----------|-----------------------------------|--------|-----------------------------------|--------------------|-----------------------------------|
| | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| <i>Women (cont.)</i> | | | | | | | | |
| 90–94 | 394,040 | 871.20 | 357,280 | 887.30 | 31,100 | 704.40 | 4,510 | 751.30 |
| 95 or older | 104,030 | 813.70 | 92,200 | 835.60 | 10,620 | 633.10 | 920 | 652.20 |
| Disabled workers | | | | | | | | |
| Total | 41,810 | 1,054.30 | 33,320 | 1,093.60 | 5,790 | 954.20 | 2,700 | 784.10 |
| 62 | 4,320 | 1,118.10 | 3,280 | 1,159.80 | 680 | 1,040.80 | 360 | 884.40 |
| 63 | 13,140 | 1,084.70 | 10,560 | 1,126.90 | 1,690 | 964.00 | 890 | 813.00 |
| 64 | 19,290 | 1,036.00 | 15,430 | 1,072.00 | 2,650 | 942.90 | 1,210 | 781.90 |
| 65 | 5,060 | 990.90 | 4,050 | 1,036.00 | 770 | 894.90 | 240 | 537.20 |
| <i>Men</i> | | | | | | | | |
| Subtotal | 26,850 | 1,204.50 | 21,770 | 1,251.40 | 3,290 | 1,088.50 | 1,790 | 846.70 |
| 62 | 2,890 | 1,257.60 | 2,210 | 1,318.60 | 410 | 1,160.90 | 270 | 905.20 |
| 63 | 8,510 | 1,232.90 | 6,950 | 1,285.40 | 950 | 1,082.30 | 610 | 870.00 |
| 64 | 12,290 | 1,189.50 | 9,990 | 1,230.50 | 1,520 | 1,092.50 | 780 | 853.00 |
| 65 | 3,160 | 1,137.50 | 2,620 | 1,184.30 | 410 | 1,015.70 | 130 | 578.10 |
| <i>Women</i> | | | | | | | | |
| Subtotal | 14,960 | 784.90 | 11,550 | 796.30 | 2,500 | 777.40 | 910 | 660.80 |
| 62 | 1,430 | 836.30 | 1,070 | 831.90 | 270 | 858.60 | 90 | 822.10 |
| 63 | 4,630 | 812.10 | 3,610 | 821.70 | 740 | 812.00 | 280 | 688.70 |
| 64 | 7,000 | 766.70 | 5,440 | 780.90 | 1,130 | 741.70 | 430 | 652.90 |
| 65 | 1,900 | 747.00 | 1,430 | 764.20 | 360 | 757.40 | 110 | 488.90 |
| Spouses | | | | | | | | |
| Total | 2,134,430 | 442.30 | 1,964,310 | 450.60 | 91,150 | 365.00 | 73,950 | 321.60 |
| <i>Wives</i> | | | | | | | | |
| Subtotal | 2,123,240 | 443.40 | 1,956,560 | 451.40 | 89,610 | 367.00 | 72,060 | 324.20 |
| By age | | | | | | | | |
| 62–64 | 289,530 | 419.40 | 258,320 | 431.40 | 14,880 | 342.30 | 16,110 | 299.40 |
| 62 | 74,260 | 409.60 | 66,470 | 419.80 | 3,920 | 346.30 | 3,850 | 298.70 |
| 63 | 100,420 | 417.50 | 89,400 | 430.00 | 4,940 | 342.50 | 6,000 | 294.10 |
| 64 | 114,850 | 427.40 | 102,450 | 440.20 | 6,020 | 339.60 | 6,260 | 304.90 |
| 65–69 | 600,210 | 454.30 | 541,240 | 465.40 | 30,440 | 377.70 | 27,600 | 325.50 |
| 65 | 129,550 | 454.90 | 115,590 | 467.10 | 6,680 | 389.20 | 7,170 | 321.00 |
| 66 | 121,330 | 459.50 | 108,830 | 472.00 | 6,450 | 383.70 | 5,920 | 315.00 |
| 67 | 119,130 | 457.20 | 107,590 | 468.60 | 5,670 | 372.50 | 5,710 | 331.40 |
| 68 | 117,420 | 453.10 | 106,330 | 463.60 | 6,000 | 365.10 | 4,870 | 336.60 |
| 69 | 112,780 | 446.20 | 102,900 | 454.80 | 5,640 | 376.10 | 3,930 | 327.30 |
| 70–74 | 533,410 | 447.00 | 494,910 | 454.40 | 21,980 | 370.20 | 15,160 | 325.80 |
| 70 | 106,970 | 446.60 | 98,210 | 456.00 | 4,640 | 353.40 | 3,910 | 325.00 |
| 71 | 109,760 | 447.60 | 101,580 | 455.30 | 4,850 | 364.20 | 3,020 | 331.20 |
| 72 | 108,760 | 449.10 | 101,570 | 455.70 | 4,040 | 385.70 | 2,870 | 313.70 |
| 73 | 108,250 | 446.90 | 100,700 | 452.90 | 4,550 | 385.00 | 2,740 | 332.20 |
| 74 | 99,670 | 444.60 | 92,850 | 451.70 | 3,900 | 364.10 | 2,620 | 327.60 |
| 75–79 | 408,070 | 440.30 | 383,990 | 445.20 | 14,340 | 368.80 | 8,320 | 345.50 |
| 75 | 96,130 | 445.30 | 89,930 | 450.90 | 3,690 | 372.40 | 2,110 | 341.70 |
| 76 | 91,430 | 446.00 | 86,450 | 450.70 | 3,050 | 377.10 | 1,650 | 340.60 |
| 77 | 79,890 | 438.20 | 74,880 | 444.20 | 2,950 | 355.30 | 1,820 | 336.10 |
| 78 | 74,010 | 437.80 | 69,720 | 442.10 | 2,480 | 368.60 | 1,550 | 365.20 |
| 79 | 66,610 | 430.30 | 63,010 | 434.00 | 2,170 | 370.00 | 1,190 | 347.50 |
| 80–84 | 217,030 | 439.50 | 206,380 | 443.40 | 5,910 | 358.80 | 3,860 | 354.40 |
| 85–89 | 63,990 | 456.40 | 61,290 | 460.20 | 1,580 | 363.90 | 920 | 369.60 |
| 90–94 | 10,300 | 420.50 | 9,810 | 423.80 | 400 | 350.70 | 90 | 372.20 |
| 95 or older | 700 | 410.80 | 620 | 411.10 | 80 | 408.50 | 0 | ... |

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, sex, age, and race, December 2003—Continued

| Age and type of benefit | All races ^a | | White | | Black | | Other ^b | |
|-------------------------------|------------------------|-----------------------------------|-----------|-----------------------------------|---------|-----------------------------------|--------------------|-----------------------------------|
| | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Number | Average monthly benefit (dollars) |
| <i>Wives (cont.)</i> | | | | | | | | |
| By type of benefit | | | | | | | | |
| Wives of retired workers | 2,077,490 | 446.90 | 1,917,690 | 454.90 | 85,720 | 371.10 | 69,140 | 325.60 |
| Wives of disabled workers | 45,750 | 281.80 | 38,870 | 281.80 | 3,890 | 275.40 | 2,920 | 291.50 |
| <i>Husbands</i> | | | | | | | | |
| Subtotal | 11,190 | 239.10 | 7,750 | 240.80 | 1,540 | 250.50 | 1,890 | 223.10 |
| Nondisabled widow(er)s | | | | | | | | |
| Total | 2,620,080 | 815.90 | 2,207,640 | 833.90 | 264,980 | 676.30 | 141,580 | 798.20 |
| 60–64 | 454,170 | 868.70 | 321,870 | 890.70 | 44,820 | 738.50 | 87,180 | 855.10 |
| 60 | 56,890 | 880.80 | 19,400 | 928.70 | 2,510 | 733.90 | 34,960 | 864.80 |
| 61 | 82,350 | 865.50 | 56,790 | 895.30 | 7,780 | 741.80 | 17,740 | 824.90 |
| 62 | 93,790 | 876.90 | 68,280 | 892.80 | 9,440 | 737.30 | 16,020 | 891.60 |
| 63 | 107,120 | 873.40 | 84,660 | 892.90 | 12,630 | 755.00 | 9,750 | 861.10 |
| 64 | 114,020 | 853.80 | 92,740 | 876.40 | 12,460 | 721.70 | 8,710 | 804.10 |
| 65–69 | 545,920 | 867.50 | 459,880 | 890.60 | 61,480 | 722.70 | 23,380 | 800.00 |
| 65 | 116,910 | 882.40 | 94,090 | 897.80 | 12,730 | 732.90 | 9,940 | 928.10 |
| 66 | 108,810 | 880.20 | 92,140 | 906.90 | 12,460 | 739.60 | 4,010 | 716.70 |
| 67 | 109,900 | 867.60 | 93,520 | 894.90 | 12,310 | 710.20 | 3,710 | 709.90 |
| 68 | 107,480 | 855.10 | 92,020 | 879.10 | 12,220 | 713.20 | 3,030 | 706.50 |
| 69 | 102,820 | 850.10 | 88,110 | 873.40 | 11,760 | 716.70 | 2,690 | 679.90 |
| 70–74 | 465,970 | 832.90 | 400,930 | 857.60 | 51,990 | 681.30 | 11,550 | 664.00 |
| 70 | 90,120 | 843.00 | 77,090 | 869.80 | 10,360 | 688.30 | 2,430 | 659.20 |
| 71 | 92,090 | 836.00 | 78,630 | 862.60 | 10,640 | 681.50 | 2,530 | 666.40 |
| 72 | 92,240 | 833.20 | 79,250 | 857.20 | 10,480 | 684.80 | 2,270 | 688.00 |
| 73 | 97,490 | 829.80 | 84,840 | 851.80 | 10,160 | 685.70 | 2,150 | 663.90 |
| 74 | 94,030 | 822.90 | 81,120 | 847.60 | 10,350 | 666.50 | 2,170 | 641.60 |
| 75–79 | 472,620 | 797.90 | 414,620 | 818.10 | 47,500 | 651.60 | 9,140 | 649.10 |
| 75 | 95,690 | 815.60 | 83,530 | 836.80 | 10,010 | 677.30 | 1,870 | 625.60 |
| 76 | 97,590 | 807.40 | 85,440 | 828.40 | 9,940 | 656.80 | 1,930 | 664.00 |
| 77 | 96,390 | 796.50 | 84,090 | 816.30 | 10,080 | 653.90 | 1,880 | 682.10 |
| 78 | 91,500 | 790.50 | 80,700 | 809.50 | 8,890 | 647.40 | 1,670 | 641.50 |
| 79 | 91,450 | 778.00 | 80,860 | 798.40 | 8,580 | 617.40 | 1,790 | 630.20 |
| 80–84 | 376,490 | 766.20 | 335,310 | 784.30 | 34,170 | 616.20 | 5,970 | 608.10 |
| 85–89 | 192,430 | 721.50 | 173,760 | 736.20 | 15,440 | 578.10 | 2,870 | 592.90 |
| 90–94 | 84,760 | 685.60 | 76,330 | 700.10 | 7,170 | 552.80 | 1,150 | 554.80 |
| 95 or older | 27,720 | 681.30 | 24,940 | 695.70 | 2,410 | 556.70 | 340 | 531.20 |

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.

- a. Includes 39,180 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.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.A4—Number and total monthly benefits, by trust fund and type of benefit, December 1940–2003, 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 | | | | | | | | |
| Number | | | | | | | | | | | |
| 1940 | 222,488 | 222,488 | ... | 112,331 | ... | 29,749 | 54,648 | 20,499 | 4,437 | 824 | ... |
| 1945 | 1,288,107 | 1,288,107 | ... | 518,234 | ... | 159,168 | 390,134 | 120,581 | 93,781 | 6,209 | ... |
| 1950 | 3,477,243 | 3,477,243 | ... | 1,770,984 | ... | 508,350 | 699,703 | 169,438 | 314,189 | 14,579 | ... |
| 1955 | 7,960,616 | 7,960,616 | ... | 4,473,971 | ... | 1,191,963 | 1,276,240 | 291,916 | 701,360 | 25,166 | ... |
| 1957 | 11,128,897 | 10,979,047 | 149,850 | 6,197,532 | 149,850 | 1,827,048 | 1,502,077 | 328,309 | 1,095,137 | 28,944 | ... |
| 1960 | 14,844,589 | 14,157,138 | 687,451 | 8,061,469 | 455,371 | 2,345,983 | 2,000,451 | 401,358 | 1,543,843 | 36,114 | ... |
| 1965 | 20,866,767 | 19,127,716 | 1,739,051 | 11,100,584 | 988,074 | 2,806,912 | 3,092,659 | 471,816 | 2,371,433 | 35,289 | ... |
| 1966 | 22,767,252 | 20,796,930 | 1,970,322 | 11,658,443 | 1,097,190 | 2,860,026 | 3,392,970 | 487,755 | 2,602,015 | 34,540 | 634,313 |
| 1970 | 26,228,629 | 23,563,634 | 2,664,995 | 13,349,175 | 1,492,948 | 2,951,552 | 4,122,305 | 523,136 | 3,227,160 | 28,729 | 533,624 |
| 1975 | 32,084,511 | 27,732,311 | 4,352,200 | 16,588,001 | 2,488,774 | 3,320,310 | 4,972,008 | 581,845 | 3,888,705 | 21,444 | 223,424 |
| 1980 | 35,584,955 | 30,906,511 | 4,678,444 | 19,562,085 | 2,858,680 | 3,477,427 | 4,606,517 | 562,316 | 4,410,515 | 14,779 | 92,636 |
| 1985 | 37,058,317 | 33,151,003 | 3,907,314 | 22,431,930 | 2,656,638 | 3,374,599 | 3,319,490 | 371,659 | 4,862,805 | 9,541 | 31,655 |
| 1990 | 39,832,125 | 35,566,144 | 4,265,981 | 24,838,100 | 3,011,294 | 3,366,975 | 3,187,010 | 303,923 | 5,111,482 | 5,908 | 7,433 |
| 1991 | 40,592,173 | 36,079,133 | 4,513,040 | 25,288,719 | 3,194,938 | 3,370,454 | 3,268,252 | 300,661 | 5,158,383 | 5,467 | 5,299 |
| 1992 | 41,507,188 | 36,617,492 | 4,889,696 | 25,757,727 | 3,467,783 | 3,382,189 | 3,391,173 | 294,176 | 5,205,375 | 5,083 | 3,682 |
| 1993 | 42,245,719 | 36,992,153 | 5,253,566 | 26,104,305 | 3,725,966 | 3,367,206 | 3,527,483 | 289,350 | 5,224,279 | 4,673 | 2,457 |
| 1994 | 42,883,470 | 37,299,951 | 5,583,519 | 26,407,756 | 3,962,954 | 3,337,484 | 3,653,887 | 283,072 | 5,232,379 | 4,318 | 1,620 |
| 1995 | 43,387,259 | 37,529,603 | 5,857,656 | 26,672,806 | 4,185,263 | 3,289,551 | 3,734,097 | 275,020 | 5,225,519 | 3,976 | 1,027 |
| 1996 | 43,736,836 | 37,664,802 | 6,072,034 | 26,898,072 | 4,385,623 | 3,194,080 | 3,802,791 | 242,135 | 5,209,812 | 3,670 | 653 |
| 1997 | 43,971,086 | 37,818,047 | 6,153,039 | 27,274,572 | 4,508,134 | 3,129,129 | 3,771,774 | 230,222 | 5,053,442 | 3,419 | 394 |
| 1998 | 44,245,731 | 37,911,161 | 6,334,570 | 27,510,535 | 4,698,319 | 3,054,073 | 3,768,928 | 220,610 | 4,989,855 | 3,186 | 225 |
| 1999 | 44,595,624 | 38,071,894 | 6,523,730 | 27,774,677 | 4,879,455 | 2,987,307 | 3,794,795 | 212,401 | 4,943,915 | 2,931 | 143 |
| 2000 | 45,414,794 | 38,741,432 | 6,673,362 | 28,498,945 | 5,042,334 | 2,963,326 | 3,802,863 | 203,052 | 4,901,437 | 2,748 | 89 |
| 2001 | 45,877,506 | 38,964,263 | 6,913,243 | 28,836,774 | 5,274,183 | 2,898,861 | 3,839,381 | 197,375 | 4,828,327 | 2,564 | 41 |
| 2002 | 46,444,317 | 39,233,049 | 7,221,268 | 29,190,137 | 5,543,981 | 2,832,767 | 3,910,256 | 194,117 | 4,770,638 | 2,400 | 21 |
| 2003 | 47,038,486 | 39,443,034 | 7,595,452 | 29,531,611 | 5,873,673 | 2,772,577 | 3,960,909 | 190,252 | 4,707,215 | 2,238 | 21 |
| Total monthly benefits (thousands of dollars) | | | | | | | | | | | |
| 1940 | 4,070 | 4,070 | ... | 2,539 | ... | 361 | 668 | 402 | 90 | 11 | ... |
| 1945 | 23,801 | 23,801 | ... | 12,538 | ... | 2,040 | 4,858 | 2,391 | 1,893 | 81 | ... |
| 1950 | 126,857 | 126,857 | ... | 77,678 | ... | 11,995 | 19,366 | 5,801 | 11,481 | 535 | ... |
| 1955 | 411,613 | 411,613 | ... | 276,942 | ... | 39,416 | 46,444 | 13,403 | 34,152 | 1,256 | ... |
| 1957 | 605,455 | 594,552 | 10,904 | 400,250 | 10,904 | 62,802 | 57,952 | 16,102 | 55,944 | 1,501 | ... |
| 1960 | 936,321 | 888,320 | 48,000 | 596,849 | 40,668 | 90,503 | 93,275 | 23,795 | 89,054 | 2,178 | ... |
| 1965 | 1,516,802 | 1,395,817 | 120,986 | 931,532 | 96,599 | 120,796 | 159,428 | 30,882 | 174,883 | 2,683 | ... |
| 1966 | 1,638,548 | 1,502,863 | 135,685 | 983,338 | 107,627 | 123,262 | 175,100 | 31,983 | 192,821 | 2,642 | 21,777 |
| 1970 | 2,628,326 | 2,385,926 | 242,400 | 1,576,551 | 196,010 | 175,323 | 279,845 | 45,258 | 328,245 | 2,965 | 24,128 |
| 1975 | 5,727,758 | 5,047,656 | 680,102 | 3,436,752 | 562,180 | 332,159 | 544,048 | 85,676 | 747,903 | 3,685 | 15,354 |
| 1980 | 10,682,791 | 9,422,206 | 1,260,585 | 6,678,216 | 1,059,792 | 569,528 | 864,242 | 138,426 | 1,358,836 | 4,080 | 9,672 |
| 1985 | 15,901,579 | 14,441,682 | 1,459,896 | 10,736,304 | 1,285,375 | 796,351 | 858,006 | 123,557 | 2,094,003 | 3,609 | 4,373 |
| 1990 | 21,686,763 | 19,716,655 | 1,970,108 | 14,966,531 | 1,768,313 | 1,004,852 | 991,628 | 124,340 | 2,827,012 | 2,849 | 1,238 |
| 1991 | 23,076,535 | 20,912,298 | 2,164,237 | 15,914,665 | 1,946,823 | 1,049,463 | 1,045,006 | 127,510 | 2,989,385 | 2,767 | 915 |
| 1992 | 24,442,156 | 22,033,164 | 2,408,992 | 16,810,432 | 2,171,080 | 1,089,504 | 1,100,812 | 128,748 | 3,138,250 | 2,676 | 655 |
| 1993 | 25,662,445 | 23,011,870 | 2,650,575 | 17,595,964 | 2,390,829 | 1,117,643 | 1,160,403 | 129,752 | 3,264,849 | 2,557 | 448 |
| 1994 | 26,936,223 | 24,032,186 | 2,904,037 | 18,415,099 | 2,620,982 | 1,144,466 | 1,226,468 | 131,463 | 3,394,982 | 2,459 | 303 |
| 1995 | 28,148,078 | 24,993,131 | 3,154,947 | 19,199,157 | 2,853,365 | 1,164,029 | 1,283,288 | 131,430 | 3,514,262 | 2,349 | 197 |
| 1996 | 29,426,079 | 26,017,474 | 3,408,605 | 20,038,023 | 3,087,223 | 1,177,458 | 1,356,685 | 124,678 | 3,639,632 | 2,252 | 129 |
| 1997 | 30,463,716 | 26,884,933 | 3,578,782 | 20,864,462 | 3,252,919 | 1,185,143 | 1,389,552 | 122,488 | 3,646,898 | 2,173 | 79 |
| 1998 | 31,298,873 | 27,519,891 | 3,778,982 | 21,449,654 | 3,444,259 | 1,179,882 | 1,417,362 | 120,247 | 3,685,349 | 2,074 | 46 |
| 1999 | 32,578,327 | 28,548,030 | 4,030,297 | 22,339,070 | 3,679,691 | 1,188,814 | 1,473,988 | 120,157 | 3,774,601 | 1,975 | 30 |
| 2000 | 34,848,920 | 30,517,277 | 4,331,642 | 24,066,918 | 3,965,304 | 1,233,598 | 1,547,808 | 120,812 | 3,912,527 | 1,934 | 19 |
| 2001 | 36,504,206 | 31,823,443 | 4,680,763 | 25,215,898 | 4,295,600 | 1,246,333 | 1,624,285 | 122,526 | 3,997,687 | 1,868 | 9 |
| 2002 | 37,854,453 | 32,823,008 | 5,031,445 | 26,125,090 | 4,625,445 | 1,242,317 | 1,692,471 | 124,267 | 4,043,051 | 1,806 | 5 |
| 2003 | 39,541,528 | 34,048,860 | 5,492,667 | 27,230,634 | 5,060,493 | 1,247,504 | 1,763,910 | 126,278 | 4,110,963 | 1,744 | 3 |

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: Summary

Table 5.A5—Number and average age, by type of benefit, December 2003

| Type of benefit | Number ^a (thousands) | Average age |
|------------------------------|------------------------------------|----------------|
| Total, OASDI | 47,053 | 66 |
| OASI | 39,455 | 71 |
| Retired workers | 29,548 | 74 |
| Spouses of retired workers | 2,622 | 72 |
| Children of retired workers | 480 | 24 |
| Under age 18 | 273 | 13 |
| Disabled adult children | 193 | 40 |
| Students, aged 18–19 | 14 | 18 |
| Children of deceased workers | 1,907 | 22 |
| Under age 18 | 1,340 | 12 |
| Disabled adult children | 501 | 47 |
| Students, aged 18–19 | 66 | 18 |
| Nondisabled widow(er)s | 4,500 | 77 |
| Widowed mothers and fathers | 188 | 43 |
| Disabled widow(er)s | 208 | 59 |
| Parents of deceased workers | 2 | 82 |
| DI | 7,598 | 43 |
| Disabled workers | 5,867 | 51 |
| Spouses of disabled workers | 152 | 50 |
| Children of disabled workers | 1,579 | 12 |
| Under age 18 | 1,468 | 12 |
| Disabled adult children | 63 | 27 |
| Students, aged 18–19 | 48 | 18 |

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

a. 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.

Table 5.A6—Number and average monthly benefit, by age, sex, type of benefit, and race, December 2003

| Type of benefit | All races ^a | White | Black | Other ^b |
|---|------------------------|----------|--------|--------------------|
| <i>Number ^c (thousands)</i> | | | | |
| Total, OASDI | 47,053 | 39,644 | 4,837 | 2,429 |
| <i>By age and sex</i> | | | | |
| Adults | 43,087 | 37,026 | 3,995 | 1,947 |
| Men | 18,580 | 15,972 | 1,676 | 883 |
| Women | 24,507 | 21,054 | 2,319 | 1,064 |
| Children | 3,966 | 2,619 | 842 | 482 |
| Under age 18 | 3,081 | 1,946 | 681 | 435 |
| Disabled adult children | 757 | 588 | 133 | 34 |
| Students, aged 18–19 | 128 | 85 | 28 | 14 |
| Retired workers and their spouses and children | 32,650 | 28,858 | 2,626 | 1,095 |
| Retired workers | 29,548 | 26,129 | 2,406 | 950 |
| Spouses | 2,622 | 2,379 | 124 | 112 |
| Children | 480 | 350 | 97 | 33 |
| Disabled workers and their spouses and children | 7,598 | 5,368 | 1,337 | 849 |
| Disabled workers | 5,867 | 4,220 | 992 | 621 |
| Spouses | 152 | 114 | 18 | 19 |
| Children | 1,579 | 1,034 | 327 | 209 |
| Survivors of deceased workers | 6,805 | 5,418 | 873 | 486 |
| Nondisabled widow(er)s | 4,500 | 3,910 | 387 | 191 |
| Disabled widow(er)s | 208 | 143 | 39 | 25 |
| Widowed mothers and fathers | 188 | 129 | 29 | 29 |
| Children | 1,907 | 1,234 | 418 | 240 |
| Parents | 2 | 1 | 0 | 1 |
| <i>Average monthly benefit (dollars)</i> | | | | |
| Retired workers | 922.10 | 939.40 | 802.60 | 752.10 |
| Men | 1,038.90 | 1,061.70 | 878.10 | 809.40 |
| Women | 797.50 | 807.70 | 734.30 | 679.10 |
| Disabled workers | 861.70 | 890.40 | 800.20 | 767.60 |
| Men | 965.90 | 1,007.30 | 859.40 | 844.80 |
| Women | 734.40 | 742.60 | 735.50 | 679.90 |
| Widowed mothers and fathers | 659.70 | 706.50 | 565.90 | 548.60 |
| Nondisabled widow(er)s | 888.30 | 910.20 | 709.70 | 800.90 |
| Surviving children | 602.70 | 650.50 | 505.20 | 527.80 |

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.

- a. Includes 142,690 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).

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A7—Number and average monthly benefit for women, by type of benefit, basis of entitlement, and race, December 2003

| Type of benefit and basis of entitlement | All races ^a | | White | | Black | | Other ^b | |
|--|------------------------|--|-----------------------|--|-----------------------|--|-----------------------|--|
| | Number (thousands) | Average monthly benefit (dollars) | Number (thousands) | Average monthly benefit (dollars) | Number (thousands) | Average monthly benefit (dollars) | Number (thousands) | Average monthly benefit (dollars) |
| All women | | | | | | | | |
| Total ^c | 24,505 | 766.30 | 21,053 | 778.90 | 2,318 | 702.80 | 1,064 | 653.60 |
| Workers | 16,935 | 787.60 | 14,442 | 799.30 | 1,736 | 734.60 | 709 | 679.40 |
| Retired | 14,294 | 797.50 | 12,578 | 807.70 | 1,263 | 734.30 | 418 | 679.10 |
| Full benefit | 3,587 | 912.00 | 3,029 | 932.00 | 411 | 811.40 | 135 | 771.60 |
| Reduced benefit | 10,706 | 759.10 | 9,548 | 768.30 | 852 | 697.10 | 283 | 634.90 |
| Disabled | 2,642 | 734.40 | 1,864 | 742.60 | 473 | 735.50 | 291 | 679.80 |
| Wives of retired and disabled workers | 2,734 | 453.10 | 2,468 | 465.40 | 137 | 362.60 | 121 | 309.60 |
| Entitlement based on care of children | 147 | 251.00 | 108 | 269.80 | 19 | 219.80 | 19 | 179.40 |
| Husband retired | 52 | 378.40 | 41 | 398.50 | 6 | 339.10 | 5 | 260.40 |
| Husband disabled | 95 | 182.10 | 67 | 192.10 | 13 | 163.90 | 15 | 152.90 |
| Entitlement based on age | 2,587 | 464.60 | 2,361 | 474.30 | 118 | 385.70 | 102 | 334.30 |
| Husband retired | 2,535 | 468.10 | 2,317 | 477.70 | 114 | 389.70 | 98 | 335.60 |
| Full benefit | 456 | 565.30 | 397 | 588.60 | 28 | 448.10 | 29 | 360.00 |
| Reduced benefit | 2,080 | 446.80 | 1,920 | 454.80 | 86 | 371.00 | 69 | 325.50 |
| Husband disabled | 52 | 292.50 | 44 | 292.80 | 5 | 288.90 | 3 | 294.90 |
| Widows | 4,836 | 868.40 | 4,142 | 894.80 | 445 | 683.80 | 234 | 752.90 |
| Entitlement based on care of children | 177 | 665.40 | 121 | 714.10 | 27 | 565.60 | 27 | 549.80 |
| Nondisabled, aged 60 or older | 4,458 | 890.10 | 3,882 | 911.60 | 381 | 710.10 | 184 | 805.60 |
| Disabled, aged 50–64 | 201 | 567.40 | 140 | 583.30 | 38 | 502.20 | 24 | 578.00 |
| Women aged 65 or older | | | | | | | | |
| Total ^c | 19,378 | 785.50 | 17,174 | 797.10 | 1,599 | 707.60 | 551 | 650.00 |
| Entitled as worker | 13,057 | 808.20 | 11,500 | 819.10 | 1,157 | 736.10 | 364 | 692.40 |
| Worker only | 7,329 | 777.70 | 6,216 | 792.20 | 820 | 706.20 | 275 | 669.70 |
| Dually entitled | 5,728 | 847.10 | 5,283 | 850.80 | 337 | 808.70 | 90 | 762.10 |
| Wife's benefit | 2,285 | 551.30 | 2,161 | 553.90 | 79 | 496.20 | 40 | 519.10 |
| Widow's benefit | 3,443 | 1,043.40 | 3,123 | 1,056.20 | 258 | 904.70 | 50 | 955.20 |
| Entitled as wife or widow only | 6,322 | 738.60 | 5,674 | 752.40 | 442 | 633.00 | 187 | 567.50 |
| Wife's benefit | 2,295 | 470.40 | 2,100 | 479.70 | 103 | 392.20 | 85 | 340.90 |
| Widow's benefit | 4,027 | 891.50 | 3,574 | 912.70 | 339 | 706.30 | 102 | 757.40 |

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.

- a. Includes 70,000 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. Excludes parents, special age-72 beneficiaries, and disabled adult children receiving benefits because of a childhood disability.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A8—Number, average primary insurance amount, and average monthly benefit for persons with benefits based on special minimum primary insurance amount, by type of benefit and sex, December 2003

| Type of benefit and sex | Number | Average primary insurance amount (dollars) | Average monthly benefit (dollars) |
|---------------------------------------|---------|---|--------------------------------------|
| All beneficiaries | 120,384 | 549.30 | 647.44 |
| Retirement benefits | | | |
| Retired workers | 108,226 | 546.36 | 674.99 |
| Men | 23,682 | 526.18 | 466.45 |
| Women | 84,544 | 552.02 | 733.40 |
| Wives and husbands of retired workers | 3,400 | 529.44 | 215.19 |
| Children of retired workers | 413 | 542.61 | 219.73 |
| Disability benefits | | | |
| Disabled workers | 11 | 534.16 | 532.11 |
| Children of disabled workers | 2 | 638.70 | 319.00 |
| Survivor benefits | | | |
| Nondisabled widow(er)s | 6,899 | 595.31 | 501.53 |
| Disabled widow(er)s | 190 | 594.11 | 375.03 |
| Widowed mothers and fathers | 40 | 582.73 | 388.65 |
| Children of deceased workers | 1,202 | 600.21 | 427.95 |

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: Summary

Table 5.A10—Number and average monthly benefit for beneficiaries aged 60 or older, by sex, type of benefit, and age, December 2003

| Type of benefit | Total, 60 or older ^a | 60–61 | 62–64 | 65–69 | 70–74 | 75–79 | 80–84 | 85–89 | 90–94 | 95 or older ^b |
|--|---------------------------------------|----------|----------|----------|----------|----------|--------|----------|----------|-----------------------------|
| Number (thousands) | | | | | | | | | | |
| <i>All beneficiaries</i> | | | | | | | | | | |
| Total ^c | 38,298 | 776 | 4,069 | 9,165 | 7,974 | 6,962 | 5,082 | 2,799 | 1,145 | 327 |
| Retired workers | 29,548 | ... | 2,587 | 7,730 | 6,584 | 5,550 | 3,921 | 2,127 | 827 | 220 |
| Widow(er)s, parents, and mothers and fathers | 4,615 | 187 | 377 | 655 | 699 | 868 | 855 | 571 | 297 | 105 |
| Wives and husbands | 2,638 | 6 | 301 | 708 | 672 | 531 | 299 | 98 | 20 | 2 |
| Disabled workers | 1,391 | 565 | 782 | 44 | ... | ... | ... | ... | ... | ... |
| Disabled adult children | 107 | 19 | 22 | 27 | 18 | 13 | 6 | 2 | 1 | d |
| <i>Men</i> | | | | | | | | | | |
| Subtotal | 16,167 | 332 | 1,801 | 4,311 | 3,611 | 2,918 | 1,930 | 907 | 296 | 61 |
| Retired workers | 15,254 | ... | 1,331 | 4,255 | 3,588 | 2,901 | 1,921 | 903 | 294 | 61 |
| Widowers, parents, and fathers | 45 | 10 | 13 | 8 | 4 | 4 | 3 | 2 | 1 | d |
| Husbands | 38 | d | 2 | 9 | 11 | 9 | 5 | 2 | 1 | d |
| Disabled workers | 780 | 312 | 443 | 25 | ... | ... | ... | ... | ... | ... |
| Disabled adult children | 51 | 9 | 11 | 14 | 8 | 5 | 2 | 1 | d | d |
| <i>Women</i> | | | | | | | | | | |
| Subtotal | 22,131 | 444 | 2,268 | 4,854 | 4,363 | 4,044 | 3,151 | 1,892 | 849 | 266 |
| Retired workers | 14,294 | ... | 1,256 | 3,475 | 2,996 | 2,649 | 2,000 | 1,224 | 534 | 159 |
| Widows, parents, and mothers | 4,569 | 177 | 364 | 648 | 695 | 864 | 853 | 569 | 296 | 104 |
| Wives | 2,600 | 6 | 299 | 699 | 661 | 523 | 295 | 97 | 19 | 2 |
| Disabled workers | 611 | 253 | 339 | 19 | ... | ... | ... | ... | ... | ... |
| Disabled adult children | 57 | 9 | 11 | 14 | 10 | 7 | 4 | 2 | d | d |
| Average monthly benefit (dollars) | | | | | | | | | | |
| <i>All beneficiaries</i> | | | | | | | | | | |
| Total ^c | 885.40 | 903.40 | 838.50 | 890.40 | 871.60 | 880.10 | 881.90 | 972.60 | 935.60 | 862.70 |
| Retired workers | 922.10 | ... | 858.60 | 930.20 | 912.30 | 920.80 | 910.50 | 1,009.40 | 969.80 | 890.90 |
| Widow(er)s, parents, and mothers and fathers | 880.50 | 794.10 | 818.90 | 892.80 | 887.40 | 881.00 | 897.60 | 918.10 | 870.60 | 811.50 |
| Wives and husbands | 461.40 | 414.60 | 417.30 | 464.30 | 465.50 | 463.20 | 470.60 | 504.70 | 501.20 | 468.40 |
| Disabled workers | 950.90 | 954.40 | 950.30 | 919.10 | ... | ... | ... | ... | ... | ... |
| Disabled adult children | 557.00 | 602.10 | 598.30 | 561.90 | 536.80 | 497.30 | 485.70 | 452.90 | 422.70 | d |
| <i>Men</i> | | | | | | | | | | |
| Subtotal | 1,038.50 | 1,093.80 | 1,041.40 | 1,069.20 | 1,029.00 | 1,023.40 | 970.80 | 1,095.50 | 1,059.90 | 967.60 |
| Retired workers | 1,038.90 | ... | 1,022.50 | 1,073.00 | 1,032.90 | 1,027.10 | 973.60 | 1,098.80 | 1,065.10 | 972.30 |
| Widowers, parents, and fathers | 681.80 | 628.40 | 751.30 | 776.90 | 666.70 | 633.90 | 556.20 | 539.20 | 506.70 | d |
| Husbands | 259.50 | d | 210.70 | 262.40 | 268.20 | 253.80 | 256.30 | 258.60 | 302.50 | d |
| Disabled workers | 1,121.10 | 1,124.00 | 1,121.00 | 1,086.40 | ... | ... | ... | ... | ... | ... |
| Disabled adult children | 562.80 | 605.00 | 602.10 | 563.10 | 539.90 | 489.20 | 477.30 | 479.60 | d | d |
| <i>Women</i> | | | | | | | | | | |
| Subtotal | 773.50 | 761.30 | 677.50 | 731.60 | 741.30 | 776.30 | 827.40 | 913.70 | 892.30 | 838.40 |
| Retired workers | 797.50 | ... | 684.90 | 755.40 | 767.90 | 804.40 | 849.90 | 943.60 | 917.30 | 859.90 |
| Widows, parents, and mothers | 882.40 | 803.90 | 821.40 | 894.20 | 888.70 | 882.00 | 898.60 | 919.30 | 872.20 | 812.50 |
| Wives | 464.30 | 415.80 | 418.60 | 466.90 | 468.70 | 466.60 | 473.90 | 509.40 | 510.90 | 486.30 |
| Disabled workers | 733.60 | 745.20 | 726.70 | 701.90 | ... | ... | ... | ... | ... | ... |
| Disabled adult children | 551.80 | 599.10 | 594.30 | 560.70 | 534.30 | 503.10 | 490.10 | 439.90 | d | d |

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

NOTE: ... = not applicable.

- a. The sum of the individual categories may not equal total because of independent rounding.
- b. Includes 40,470 persons aged 100 or older—5,570 men and 34,900 women.
- c. Includes special age-72 beneficiaries.
- d. Fewer than 500 beneficiaries.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A14—Number and percentage distribution of women aged 62 or older, by basis of entitlement, type of benefit, and dual entitlement status, December 1960–2003, selected years

| Entitlement | 1960 | 1970 | 1975 | 1980 | 1985 | 1990 | 1995 | 2000 | 2003 |
|---|-------|--------|--------|--------|--------|--------|--------|--------|--------|
| Number (thousands) | | | | | | | | | |
| All women 62 or older ^a | 6,619 | 11,374 | 14,010 | 16,350 | 18,412 | 19,954 | 20,888 | 21,381 | 21,627 |
| Entitled as worker ^b | 2,866 | 5,753 | 7,586 | 9,304 | 10,805 | 12,037 | 12,974 | 14,013 | 14,643 |
| Worker only | 2,563 | 4,786 | 5,926 | 6,710 | 7,096 | 7,359 | 7,554 | 8,117 | 8,579 |
| Dually entitled ^c | 303 | 967 | 1,660 | 2,594 | 3,709 | 4,678 | 5,420 | 5,896 | 6,063 |
| Wife's benefit | 159 | 388 | 617 | 1,016 | 1,594 | 2,077 | 2,398 | 2,568 | 2,603 |
| Widow's benefit | 141 | 574 | 1,039 | 1,575 | 2,112 | 2,600 | 3,022 | 3,327 | 3,460 |
| Entitled as wife or widow only ^c | 3,753 | 5,621 | 6,424 | 7,046 | 7,607 | 7,917 | 7,914 | 7,368 | 6,985 |
| Wife's benefit | 2,174 | 2,546 | 2,745 | 2,884 | 3,018 | 3,059 | 2,985 | 2,768 | 2,593 |
| Widow's benefit ^d | 1,546 | 3,048 | 3,659 | 4,148 | 4,580 | 4,853 | 4,926 | 4,598 | 4,389 |
| Percentage distribution | | | | | | | | | |
| All women 62 or older ^a | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Entitled as worker ^b | 43.3 | 50.6 | 54.1 | 56.9 | 58.7 | 60.3 | 62.1 | 65.5 | 67.7 |
| Worker only | 38.7 | 42.1 | 42.3 | 41.0 | 38.5 | 36.9 | 36.2 | 38.0 | 39.7 |
| Dually entitled ^c | 4.6 | 8.5 | 11.8 | 15.9 | 20.1 | 23.4 | 25.9 | 27.6 | 28.0 |
| 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 | 16.0 |
| Entitled as wife or widow only ^c | 56.7 | 49.4 | 45.9 | 43.1 | 41.3 | 39.7 | 37.9 | 34.5 | 32.3 |
| Wife's benefit | 32.8 | 22.4 | 19.6 | 17.6 | 16.4 | 15.3 | 14.3 | 12.9 | 12.0 |
| Widow's benefit ^d | 23.4 | 26.8 | 26.1 | 25.4 | 24.9 | 24.3 | 23.6 | 21.5 | 20.3 |

SOURCE: Social Security Administration, Master Beneficiary Record. Dual entitlement data for 1995, 2000, and 2003 are based on a 10 percent sample. All other years are 100 percent data.

- a. Excludes special age-72 beneficiaries and disabled adult children.
- b. Includes disabled workers.
- c. Includes parents. Excludes dually entitled disabled workers.
- d. Includes disabled widows and mothers.

CONTACT: 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 basis of entitlement, type of benefit, and dual entitlement status, December 2003

| Entitlement | Total | 65–69 | 70–74 | 75–79 | 80–84 | 85–89 | 90 or older |
|--|------------|-----------|-----------|-----------|-----------|-----------|-------------|
| Number | | | | | | | |
| All women 65 or older ^a | 19,378,420 | 4,839,410 | 4,352,480 | 4,036,440 | 3,147,010 | 1,889,640 | 1,113,440 |
| Entitled as worker | 13,056,600 | 3,493,960 | 2,996,040 | 2,649,480 | 1,999,780 | 1,224,270 | 693,070 |
| Worker only | 7,328,670 | 2,379,630 | 1,783,450 | 1,370,250 | 880,760 | 572,500 | 342,080 |
| Dually entitled | 5,727,930 | 1,114,330 | 1,212,590 | 1,279,230 | 1,119,020 | 651,770 | 350,990 |
| Wife's benefit | 2,284,920 | 804,660 | 663,300 | 479,470 | 256,250 | 68,840 | 12,400 |
| Widow's benefit | 3,443,010 | 309,670 | 549,290 | 799,760 | 862,770 | 582,930 | 338,590 |
| Entitled as wife or widow only | 6,321,820 | 1,345,450 | 1,356,440 | 1,386,960 | 1,147,230 | 665,370 | 420,370 |
| Wife's benefit | 2,295,170 | 698,580 | 661,410 | 522,830 | 294,840 | 96,650 | 20,860 |
| Widow's benefit | 4,026,650 | 646,870 | 695,030 | 864,130 | 852,390 | 568,720 | 399,510 |
| Average monthly benefit (dollars) | | | | | | | |
| All women 65 or older ^a | 785.50 | 732.10 | 741.80 | 777.30 | 827.90 | 914.10 | 879.80 |
| Entitled as worker | 808.20 | 755.10 | 767.90 | 804.40 | 849.90 | 943.60 | 904.10 |
| Worker only | 777.70 | 777.40 | 760.60 | 759.30 | 751.80 | 871.90 | 851.80 |
| Dually entitled | 847.10 | 707.30 | 778.80 | 852.80 | 927.00 | 1,006.50 | 955.20 |
| Wife's benefit | 551.30 | 568.30 | 548.20 | 534.00 | 530.50 | 573.20 | 582.70 |
| Widow's benefit | 1,043.40 | 1,068.50 | 1,057.30 | 1,044.00 | 1,044.80 | 1,057.70 | 968.80 |
| Entitled as wife or widow only | 738.60 | 672.40 | 683.90 | 725.40 | 789.50 | 859.70 | 839.60 |
| Wife's benefit | 470.40 | 466.90 | 468.70 | 466.60 | 473.90 | 509.40 | 508.60 |
| Widow's benefit | 891.50 | 894.40 | 888.70 | 882.00 | 898.70 | 919.30 | 856.90 |

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

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

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A16—Number and average monthly benefit for adult beneficiaries, by sex, type of benefit, and age, December 2003

| 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 |
| All adult beneficiaries | | | | | | | | |
| Total ^a | 47,053 | 9,531 | 4,069 | 33,453 | 840.64 | 666.01 | 838.50 | 890.65 |
| Retired workers | 29,548 | ... | 2,587 | 26,960 | 922.10 | ... | 858.62 | 928.19 |
| Disabled workers | 5,867 | 5,042 | 782 | 44 | 861.66 | 847.42 | 950.27 | 919.10 |
| Wives and husbands of retired workers | 2,622 | 45 | 270 | 2,308 | 463.59 | 371.57 | 433.62 | 468.88 |
| Wives and husbands of disabled workers | 152 | 97 | 31 | 24 | 219.86 | 180.88 | 277.40 | 302.84 |
| Nondisabled widow(er)s | 4,500 | 139 | 313 | 4,048 | 888.33 | 871.75 | 870.54 | 890.27 |
| Disabled widow(er)s | 208 | 148 | 59 | ... | 562.28 | 565.14 | 555.12 | ... |
| Mothers and fathers | 188 | 183 | 5 | ^b | 659.73 | 658.48 | 705.00 | 671.27 |
| Disabled adult children | 757 | 668 | 22 | 67 | 567.10 | 569.71 | 598.29 | 531.07 |
| Men | | | | | | | | |
| Subtotal | 20,689 | 4,853 | 1,801 | 14,035 | 964.45 | 726.48 | 1,041.36 | 1,036.87 |
| Retired workers | 15,254 | ... | 1,331 | 13,923 | 1,038.88 | ... | 1,022.54 | 1,040.44 |
| Disabled workers | 3,226 | 2,758 | 443 | 25 | 965.91 | 939.90 | 1,121.03 | 1,086.41 |
| Husbands of retired workers | 35 | ^b | 1 | 34 | 263.49 | 260.33 | 232.72 | 264.65 |
| Husbands of disabled workers | 4 | 2 | 1 | 2 | 176.91 | 141.79 | 158.46 | 216.19 |
| Nondisabled widowers | 42 | 9 | 12 | 21 | 701.09 | 669.87 | 788.76 | 664.01 |
| Disabled widowers | 6 | 5 | 1 | ... | 397.93 | 401.78 | 381.24 | ... |
| Fathers | 12 | 12 | ^b | ^b | 575.49 | 574.51 | 655.41 | 467.80 |
| Disabled adult children | 414 | 373 | 11 | 30 | 566.85 | 568.34 | 602.12 | 535.47 |
| Women | | | | | | | | |
| Subtotal | 26,363 | 4,677 | 2,268 | 19,418 | 743.49 | 603.30 | 677.47 | 784.97 |
| Retired workers | 14,294 | ... | 1,256 | 13,037 | 797.47 | ... | 684.91 | 808.31 |
| Disabled workers | 2,642 | 2,284 | 339 | 19 | 734.35 | 735.76 | 726.72 | 701.87 |
| Wives of retired workers | 2,587 | 45 | 268 | 2,273 | 466.33 | 371.72 | 434.58 | 471.94 |
| Wives of disabled workers | 147 | 95 | 31 | 22 | 221.10 | 181.64 | 279.48 | 310.39 |
| Nondisabled widows | 4,458 | 131 | 301 | 4,027 | 890.08 | 885.21 | 873.80 | 891.45 |
| Disabled widows | 201 | 143 | 58 | ... | 567.37 | 570.91 | 558.63 | ... |
| Mothers | 177 | 171 | 5 | ^b | 665.35 | 664.17 | 706.80 | 676.92 |
| Disabled adult children | 343 | 296 | 11 | 37 | 567.41 | 571.43 | 594.28 | 527.47 |

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

NOTE: ... = not applicable.

a. Includes parents and special age-72 beneficiaries. Excludes 128,020 student beneficiaries aged 18–19.

b. Fewer than 500 beneficiaries.

CONTACT: Rona Blumenthal (410) 965-0163 or Angela Y. Harper (410) 966-9541.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A17—Number and average monthly benefit for disabled beneficiaries, by type of benefit, December 1957–2003

| Year | Number | | | | Average monthly benefit (dollars) | | |
|------|----------------------------|-----------|-------------------------|------------|-----------------------------------|-------------------------|------------|
| | All disabled beneficiaries | Workers | Disabled adult children | Widow(er)s | Workers | Disabled adult children | Widow(er)s |
| 1957 | 178,719 | 149,850 | 28,869 | ... | 72.76 | 38.62 | ... |
| 1958 | 284,744 | 237,719 | 47,025 | ... | 82.10 | 39.62 | ... |
| 1959 | 416,896 | 334,443 | 82,453 | ... | 89.00 | 42.96 | ... |
| 1960 | 559,425 | 455,371 | 104,054 | ... | 89.31 | 44.15 | ... |
| 1961 | 742,296 | 618,075 | 124,221 | ... | 89.59 | 45.28 | ... |
| 1962 | 888,131 | 740,867 | 147,264 | ... | 89.99 | 45.67 | ... |
| 1963 | 993,656 | 827,014 | 166,642 | ... | 90.59 | 46.45 | ... |
| 1964 | 1,077,695 | 894,173 | 183,522 | ... | 91.12 | 47.35 | ... |
| 1965 | 1,186,464 | 988,074 | 198,390 | ... | 97.76 | 51.77 | ... |
| 1966 | 1,310,911 | 1,097,190 | 213,721 | ... | 98.09 | 52.42 | ... |
| 1967 | 1,422,778 | 1,193,120 | 229,658 | ... | 98.43 | 53.41 | ... |
| 1968 | 1,560,517 | 1,295,300 | 243,654 | 21,563 | 111.86 | 61.83 | 72.25 |
| 1969 | 1,690,982 | 1,394,291 | 257,222 | 39,469 | 112.74 | 62.79 | 71.02 |
| 1970 | 1,812,786 | 1,492,948 | 270,557 | 49,281 | 131.26 | 73.21 | 82.00 |
| 1971 | 1,990,098 | 1,647,684 | 285,671 | 56,743 | 146.52 | 81.37 | 90.11 |
| 1972 | 2,202,090 | 1,832,916 | 305,007 | 64,167 | 179.32 | 98.81 | 109.54 |
| 1973 | 2,415,383 | 2,016,626 | 319,988 | 78,769 | 183.00 | 100.14 | 111.14 |
| 1974 | 2,670,092 | 2,236,882 | 341,082 | 92,128 | 205.70 | 112.45 | 125.87 |
| 1975 | 2,960,620 | 2,488,774 | 362,335 | 109,511 | 225.90 | 122.80 | 137.70 |
| 1976 | 3,171,198 | 2,670,208 | 381,563 | 119,427 | 245.17 | 132.32 | 147.01 |
| 1977 | 3,368,954 | 2,837,432 | 404,246 | 127,276 | 265.30 | 142.12 | 156.11 |
| 1978 | 3,429,421 | 2,879,774 | 419,896 | 129,751 | 288.30 | 153.66 | 165.46 |
| 1979 | 3,435,761 | 2,870,590 | 435,338 | 129,833 | 322.00 | 171.55 | 180.52 |
| 1980 | 3,436,429 | 2,858,680 | 450,169 | 127,580 | 370.70 | 198.95 | 205.02 |
| 1981 | 3,361,130 | 2,776,519 | 463,021 | 121,590 | 413.20 | 224.51 | 226.58 |
| 1982 | 3,192,379 | 2,603,599 | 472,408 | 116,372 | 440.60 | 245.07 | 242.11 |
| 1983 | 3,168,992 | 2,569,029 | 488,372 | 111,591 | 456.20 | 257.78 | 250.33 |
| 1984 | 3,212,040 | 2,596,516 | 506,373 | 109,151 | 470.70 | 270.28 | 306.24 |
| 1985 | 3,289,485 | 2,656,638 | 525,842 | 107,005 | 483.80 | 281.92 | 315.26 |
| 1986 | 3,380,480 | 2,728,463 | 545,043 | 106,974 | 487.90 | 288.79 | 319.74 |
| 1987 | 3,453,414 | 2,785,859 | 561,273 | 106,282 | 508.20 | 304.32 | 333.89 |
| 1988 | 3,507,707 | 2,830,284 | 574,300 | 103,123 | 529.50 | 320.21 | 348.05 |
| 1989 | 3,583,451 | 2,895,364 | 586,457 | 101,630 | 556.00 | 339.47 | 366.72 |
| 1990 | 3,712,763 | 3,011,294 | 600,480 | 100,989 | 587.20 | 361.71 | 388.93 |
| 1991 | 3,925,472 | 3,194,938 | 616,045 | 114,489 | 609.40 | 378.86 | 406.96 |
| 1992 | 4,236,080 | 3,467,783 | 636,973 | 131,324 | 626.10 | 393.61 | 422.65 |
| 1993 | 4,529,466 | 3,725,966 | 656,485 | 147,015 | 641.70 | 407.20 | 434.20 |
| 1994 | 4,796,313 | 3,962,954 | 672,683 | 160,676 | 661.40 | 422.40 | 446.30 |
| 1995 | 5,044,388 | 4,185,263 | 686,101 | 173,024 | 681.80 | 437.30 | 458.30 |
| 1996 | 5,264,321 | 4,385,623 | 696,787 | 181,911 | 703.90 | 454.30 | 471.00 |
| 1997 | 5,400,781 | 4,508,134 | 704,709 | 187,938 | 721.60 | 468.60 | 480.40 |
| 1998 | 5,605,272 | 4,698,319 | 712,772 | 194,181 | 733.10 | 479.40 | 487.30 |
| 1999 | 5,798,776 | 4,879,455 | 720,526 | 198,795 | 754.10 | 495.60 | 499.90 |
| 2000 | 5,972,450 | 5,042,334 | 728,689 | 201,427 | 786.40 | 518.30 | 519.70 |
| 2001 | 6,214,972 | 5,274,183 | 736,546 | 204,243 | 814.50 | 537.60 | 536.70 |
| 2002 | 6,495,868 | 5,543,981 | 744,529 | 207,358 | 834.30 | 550.40 | 548.10 |
| 2003 | 6,835,846 | 5,873,673 | 752,814 | 209,359 | 861.60 | 567.00 | 563.80 |

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 2003

| Age | All retired workers | | | Men | | | Women | | |
|-------------|---------------------|--|-----------------------------------|-----------|--|-----------------------------------|-----------|--|-----------------------------------|
| | Number | Average primary insurance amount (dollars) | Average monthly benefit (dollars) | Number | Average primary insurance amount (dollars) | Average monthly benefit (dollars) | Number | Average primary insurance amount (dollars) | Average monthly benefit (dollars) |
| Total | 3,776,140 | 1,135.30 | 1,232.70 | 2,301,430 | 1,264.20 | 1,348.00 | 1,474,710 | 934.20 | 1,052.70 |
| 66-69 | 300,800 | 1,101.90 | 1,147.10 | 188,610 | 1,220.90 | 1,257.30 | 112,190 | 901.80 | 961.90 |
| 66 | 18,330 | 1,018.40 | 1,049.80 | 9,900 | 1,145.10 | 1,170.40 | 8,430 | 869.50 | 908.30 |
| 67 | 28,230 | 933.20 | 979.20 | 16,190 | 1,015.10 | 1,050.10 | 12,040 | 823.00 | 883.90 |
| 68 | 35,800 | 899.10 | 961.00 | 19,690 | 976.50 | 1,024.30 | 16,110 | 804.40 | 883.60 |
| 69 | 218,440 | 1,164.00 | 1,207.50 | 142,830 | 1,283.20 | 1,319.00 | 75,610 | 938.70 | 997.00 |
| 70-74 | 1,099,790 | 1,122.30 | 1,229.40 | 675,150 | 1,263.30 | 1,366.50 | 424,640 | 898.10 | 1,011.20 |
| 70 | 225,670 | 1,136.70 | 1,219.80 | 140,480 | 1,273.10 | 1,346.90 | 85,190 | 911.60 | 1,010.40 |
| 71 | 222,910 | 1,147.10 | 1,246.40 | 136,600 | 1,290.00 | 1,385.20 | 86,310 | 920.80 | 1,026.70 |
| 72 | 220,930 | 1,117.80 | 1,232.80 | 135,230 | 1,260.40 | 1,374.10 | 85,700 | 892.90 | 1,009.80 |
| 73 | 221,170 | 1,108.30 | 1,225.00 | 135,640 | 1,250.90 | 1,366.30 | 85,530 | 882.20 | 1,000.80 |
| 74 | 209,110 | 1,099.90 | 1,222.50 | 127,200 | 1,240.00 | 1,360.50 | 81,910 | 882.40 | 1,008.20 |
| 75-79 | 969,820 | 1,126.90 | 1,234.80 | 600,860 | 1,261.20 | 1,357.20 | 368,960 | 908.10 | 1,035.50 |
| 75 | 206,580 | 1,124.70 | 1,237.30 | 126,730 | 1,267.70 | 1,373.60 | 79,850 | 897.90 | 1,021.10 |
| 76 | 200,830 | 1,136.20 | 1,250.90 | 123,950 | 1,275.60 | 1,381.70 | 76,880 | 911.60 | 1,040.10 |
| 77 | 198,660 | 1,121.00 | 1,223.00 | 123,620 | 1,251.50 | 1,340.00 | 75,040 | 906.00 | 1,030.30 |
| 78 | 176,470 | 1,143.70 | 1,255.00 | 109,340 | 1,276.60 | 1,376.30 | 67,130 | 927.30 | 1,057.30 |
| 79 | 187,280 | 1,109.60 | 1,208.20 | 117,220 | 1,235.10 | 1,313.90 | 70,060 | 899.70 | 1,031.30 |
| 80-84 | 751,100 | 1,074.80 | 1,184.30 | 468,560 | 1,187.90 | 1,271.40 | 282,540 | 887.30 | 1,040.00 |
| 80 | 174,550 | 1,088.70 | 1,193.10 | 109,820 | 1,205.90 | 1,287.40 | 64,730 | 889.90 | 1,033.10 |
| 81 | 160,930 | 1,077.10 | 1,186.60 | 100,950 | 1,191.60 | 1,276.70 | 59,980 | 884.40 | 1,034.90 |
| 82 | 155,590 | 1,067.30 | 1,176.20 | 96,440 | 1,181.50 | 1,264.30 | 59,150 | 881.20 | 1,032.70 |
| 83 | 142,490 | 1,055.10 | 1,167.70 | 88,890 | 1,163.50 | 1,246.30 | 53,600 | 875.50 | 1,037.30 |
| 84 | 117,540 | 1,084.80 | 1,199.10 | 72,460 | 1,193.70 | 1,279.80 | 45,080 | 909.70 | 1,069.40 |
| 85-89 | 416,210 | 1,286.40 | 1,370.50 | 246,170 | 1,416.80 | 1,477.60 | 170,040 | 1,097.60 | 1,215.30 |
| 85 | 105,970 | 1,148.20 | 1,265.00 | 62,890 | 1,269.80 | 1,359.50 | 43,080 | 970.80 | 1,127.00 |
| 86 | 93,760 | 1,186.00 | 1,301.30 | 56,690 | 1,313.80 | 1,403.10 | 37,070 | 990.40 | 1,145.50 |
| 87 | 79,760 | 1,429.30 | 1,483.40 | 47,330 | 1,569.80 | 1,603.80 | 32,430 | 1,224.40 | 1,307.60 |
| 88 | 72,050 | 1,398.70 | 1,452.30 | 42,320 | 1,541.20 | 1,575.40 | 29,730 | 1,195.90 | 1,277.00 |
| 89 | 64,670 | 1,356.80 | 1,413.30 | 36,940 | 1,486.50 | 1,519.60 | 27,730 | 1,184.20 | 1,271.70 |
| 90 or older | 238,420 | 1,198.90 | 1,259.40 | 122,080 | 1,336.20 | 1,373.50 | 116,340 | 1,054.80 | 1,139.60 |

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.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 2003

| Age | All retired workers | | | Men | | | Women | | |
|-------------|---------------------|--|-----------------------------------|-----------|--|-----------------------------------|-----------|--|-----------------------------------|
| | Number | Average primary insurance amount (dollars) | Average monthly benefit (dollars) | Number | Average primary insurance amount (dollars) | Average monthly benefit (dollars) | Number | Average primary insurance amount (dollars) | Average monthly benefit (dollars) |
| Total | 4,524,090 | 910.40 | 965.60 | 2,411,520 | 1,097.90 | 1,098.60 | 2,112,570 | 696.20 | 813.80 |
| 65-69 | 1,910,570 | 1,038.20 | 1,064.40 | 1,138,760 | 1,204.90 | 1,204.50 | 771,810 | 792.30 | 857.60 |
| 65 | 342,200 | 1,102.80 | 1,123.00 | 205,610 | 1,275.00 | 1,274.50 | 136,590 | 843.60 | 895.00 |
| 66 | 439,900 | 1,082.90 | 1,104.70 | 267,320 | 1,248.90 | 1,248.40 | 172,580 | 825.80 | 882.20 |
| 67 | 429,630 | 1,044.60 | 1,070.10 | 259,940 | 1,204.60 | 1,203.90 | 169,690 | 799.60 | 865.30 |
| 68 | 439,100 | 1,029.30 | 1,055.70 | 265,560 | 1,187.50 | 1,187.40 | 173,540 | 787.20 | 854.00 |
| 69 | 259,740 | 881.80 | 923.90 | 140,330 | 1,051.50 | 1,051.70 | 119,410 | 682.30 | 773.70 |
| 70-74 | 1,018,390 | 846.50 | 900.50 | 538,770 | 1,019.30 | 1,019.60 | 479,620 | 652.40 | 766.70 |
| 70 | 229,460 | 866.70 | 911.50 | 124,530 | 1,034.70 | 1,035.00 | 104,930 | 667.40 | 765.00 |
| 71 | 220,270 | 860.50 | 910.50 | 116,510 | 1,032.20 | 1,032.30 | 103,760 | 667.70 | 773.70 |
| 72 | 200,710 | 847.50 | 901.70 | 106,450 | 1,021.90 | 1,022.00 | 94,260 | 650.60 | 765.80 |
| 73 | 192,080 | 830.10 | 889.40 | 100,470 | 1,003.20 | 1,003.80 | 91,610 | 640.20 | 763.80 |
| 74 | 175,870 | 819.10 | 884.40 | 90,810 | 996.20 | 996.90 | 85,060 | 630.00 | 764.30 |
| 75-79 | 736,770 | 808.90 | 886.30 | 371,120 | 1,000.90 | 1,002.30 | 365,650 | 614.00 | 768.60 |
| 75 | 169,720 | 820.00 | 888.10 | 86,030 | 1,007.60 | 1,008.80 | 83,690 | 627.10 | 764.10 |
| 76 | 156,520 | 818.70 | 890.20 | 80,370 | 1,005.50 | 1,006.80 | 76,150 | 621.70 | 767.10 |
| 77 | 144,850 | 805.90 | 884.80 | 74,720 | 997.80 | 999.20 | 70,130 | 601.40 | 762.80 |
| 78 | 138,400 | 812.60 | 891.80 | 69,030 | 1,010.60 | 1,011.90 | 69,370 | 615.50 | 772.40 |
| 79 | 127,280 | 781.50 | 874.90 | 60,970 | 978.20 | 980.20 | 66,310 | 600.50 | 778.00 |
| 80-84 | 478,550 | 766.00 | 867.50 | 220,050 | 956.60 | 959.30 | 258,500 | 603.90 | 789.30 |
| 80 | 115,050 | 768.70 | 863.50 | 54,480 | 961.70 | 963.70 | 60,570 | 595.20 | 773.40 |
| 81 | 103,710 | 763.90 | 864.40 | 48,110 | 956.30 | 958.60 | 55,600 | 597.40 | 783.00 |
| 82 | 98,700 | 771.50 | 873.70 | 46,010 | 959.50 | 962.60 | 52,690 | 607.30 | 796.10 |
| 83 | 87,350 | 755.20 | 862.50 | 39,680 | 939.10 | 943.50 | 47,670 | 602.20 | 795.10 |
| 84 | 73,740 | 770.50 | 875.50 | 31,770 | 965.80 | 968.00 | 41,970 | 622.70 | 805.40 |
| 85-89 | 264,990 | 836.80 | 940.30 | 106,660 | 1,034.80 | 1,038.40 | 158,330 | 703.40 | 874.20 |
| 85 | 68,970 | 801.90 | 907.80 | 29,550 | 988.40 | 992.10 | 39,420 | 662.00 | 844.60 |
| 86 | 60,060 | 823.60 | 928.50 | 24,830 | 1,026.60 | 1,030.90 | 35,230 | 680.50 | 856.40 |
| 87 | 51,590 | 885.50 | 979.90 | 20,980 | 1,092.60 | 1,094.50 | 30,610 | 743.50 | 901.40 |
| 88 | 45,460 | 859.20 | 962.70 | 17,110 | 1,062.40 | 1,067.10 | 28,350 | 736.60 | 899.70 |
| 89 | 38,910 | 828.50 | 937.40 | 14,190 | 1,026.90 | 1,030.50 | 24,720 | 714.60 | 884.00 |
| 90 or older | 114,820 | 771.80 | 876.10 | 36,160 | 944.80 | 953.40 | 78,660 | 692.40 | 840.60 |

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 2003

| Age | All retired workers | | | Men | | | Women | | |
|-------------|---------------------|-----------------------------------|---------------------------------|-----------|-----------------------------------|---------------------------------|-----------|-----------------------------------|---------------------------------|
| | Number | Average monthly benefit (dollars) | | Number | Average monthly benefit (dollars) | | Number | Average monthly benefit (dollars) | |
| | | Before delayed retirement credit | After delayed retirement credit | | Before delayed retirement credit | After delayed retirement credit | | Before delayed retirement credit | After delayed retirement credit |
| Total | 4,385,500 | 1,181.20 | 1,202.30 | 2,596,300 | 1,296.90 | 1,320.00 | 1,789,200 | 1,013.50 | 1,031.60 |
| 66-69 | 302,800 | 1,135.70 | 1,142.10 | 191,200 | 1,245.90 | 1,252.30 | 111,600 | 946.90 | 953.20 |
| 66 | 18,800 | 1,013.50 | 1,017.00 | 10,400 | 1,125.60 | 1,129.50 | 8,400 | 874.80 | 877.70 |
| 67 | 29,000 | 1,005.10 | 1,012.00 | 17,300 | 1,085.70 | 1,092.40 | 11,700 | 885.80 | 893.20 |
| 68 | 35,600 | 934.10 | 941.80 | 18,200 | 997.60 | 1,004.80 | 17,400 | 867.70 | 876.00 |
| 69 | 219,400 | 1,196.20 | 1,202.50 | 145,300 | 1,304.70 | 1,311.10 | 74,100 | 983.30 | 989.40 |
| 70-74 | 1,274,500 | 1,185.80 | 1,204.30 | 771,700 | 1,316.90 | 1,336.90 | 502,800 | 984.70 | 1,000.70 |
| 70 | 259,200 | 1,187.90 | 1,200.70 | 158,000 | 1,315.90 | 1,328.90 | 101,200 | 987.90 | 1,000.40 |
| 71 | 248,400 | 1,213.20 | 1,230.30 | 151,000 | 1,343.10 | 1,361.20 | 97,400 | 1,011.90 | 1,027.50 |
| 72 | 255,300 | 1,184.00 | 1,203.80 | 152,600 | 1,321.30 | 1,342.90 | 102,700 | 980.00 | 997.00 |
| 73 | 267,200 | 1,172.60 | 1,193.60 | 163,600 | 1,302.50 | 1,325.90 | 103,600 | 967.40 | 984.50 |
| 74 | 244,400 | 1,172.20 | 1,193.90 | 146,500 | 1,302.30 | 1,326.50 | 97,900 | 977.50 | 995.40 |
| 75-79 | 1,137,700 | 1,171.90 | 1,193.80 | 679,500 | 1,299.10 | 1,323.50 | 458,200 | 983.20 | 1,001.60 |
| 75 | 241,100 | 1,171.00 | 1,192.80 | 142,100 | 1,319.90 | 1,344.60 | 99,000 | 957.40 | 975.00 |
| 76 | 238,200 | 1,199.40 | 1,221.40 | 145,600 | 1,334.30 | 1,358.80 | 92,600 | 987.30 | 1,005.40 |
| 77 | 229,000 | 1,161.00 | 1,181.50 | 137,400 | 1,266.20 | 1,288.10 | 91,600 | 1,003.20 | 1,021.60 |
| 78 | 209,600 | 1,178.20 | 1,201.10 | 121,800 | 1,308.40 | 1,334.30 | 87,800 | 997.70 | 1,016.40 |
| 79 | 219,800 | 1,148.40 | 1,171.00 | 132,600 | 1,263.80 | 1,288.80 | 87,200 | 972.90 | 991.70 |
| 80-84 | 879,600 | 1,126.00 | 1,149.40 | 530,000 | 1,209.60 | 1,235.20 | 349,600 | 999.10 | 1,019.30 |
| 80 | 197,400 | 1,134.50 | 1,157.20 | 119,600 | 1,229.50 | 1,254.10 | 77,800 | 988.60 | 1,008.30 |
| 81 | 188,900 | 1,133.50 | 1,158.10 | 115,200 | 1,213.90 | 1,240.50 | 73,700 | 1,007.70 | 1,029.20 |
| 82 | 186,000 | 1,104.00 | 1,126.90 | 110,000 | 1,192.80 | 1,217.90 | 76,000 | 975.50 | 995.30 |
| 83 | 165,600 | 1,104.60 | 1,127.30 | 98,400 | 1,175.90 | 1,200.60 | 67,200 | 1,000.30 | 1,019.90 |
| 84 | 141,700 | 1,157.70 | 1,182.20 | 86,800 | 1,236.10 | 1,263.30 | 54,900 | 1,033.80 | 1,054.00 |
| 85-89 | 502,800 | 1,307.60 | 1,334.80 | 281,300 | 1,432.80 | 1,463.70 | 221,500 | 1,148.60 | 1,171.00 |
| 85 | 128,600 | 1,202.50 | 1,227.70 | 72,400 | 1,304.30 | 1,332.30 | 56,200 | 1,071.40 | 1,092.90 |
| 86 | 110,000 | 1,231.60 | 1,255.90 | 61,700 | 1,352.70 | 1,379.60 | 48,300 | 1,077.00 | 1,097.80 |
| 87 | 95,300 | 1,424.20 | 1,454.30 | 52,800 | 1,571.60 | 1,606.40 | 42,500 | 1,241.10 | 1,265.40 |
| 88 | 87,900 | 1,374.10 | 1,401.30 | 48,000 | 1,511.70 | 1,542.70 | 39,900 | 1,208.50 | 1,231.20 |
| 89 | 81,000 | 1,368.30 | 1,399.00 | 46,400 | 1,500.40 | 1,536.70 | 34,600 | 1,191.20 | 1,214.40 |
| 90 or older | 288,100 | 1,194.00 | 1,221.10 | 142,600 | 1,302.20 | 1,334.20 | 145,500 | 1,087.90 | 1,110.30 |

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

CONTACT: Joseph Bondar (410) 965-0162 or Rona Blumenthal (410) 965-0163.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B4—Number, percentage, and average monthly benefit, by year of entitlement as retired worker and sex, December 2003

| Year of entitlement | All retired workers | | | | Men | | | | Women | | | |
|-------------------------|---------------------|--------------------------------------|---|--|------------|--------------------------------------|---|--|------------|--------------------------------------|---|--|
| | Number | Percent- age distribu- tion | Cumula- tive percent- age ^a | Average monthly benefit (dollars) | Number | Percent- age distribu- tion | Cumula- tive percent- age ^a | Average monthly benefit (dollars) | Number | Percent- age distribu- tion | Cumula- tive percent- age ^a | Average monthly benefit (dollars) |
| Total | 29,547,530 | 100.0 | ... | 922.10 | 15,253,930 | 100.0 | ... | 1,038.90 | 14,293,600 | 100.0 | ... | 797.50 |
| <i>Summary data</i> | | | | | | | | | | | | |
| 2000–2003 | 6,779,060 | 22.9 | ... | 954.80 | 3,703,140 | 24.3 | ... | 1,110.80 | 3,075,920 | 21.5 | ... | 766.90 |
| 1995–1999 | 7,115,270 | 24.1 | ... | 909.00 | 3,832,630 | 25.1 | ... | 1,042.10 | 3,282,640 | 23.0 | ... | 753.80 |
| 1990–1994 | 6,045,270 | 20.5 | ... | 908.60 | 3,290,060 | 21.6 | ... | 1,021.40 | 2,755,210 | 19.3 | ... | 774.00 |
| 1985–1989 | 4,716,630 | 16.0 | ... | 897.10 | 2,404,550 | 15.8 | ... | 981.80 | 2,312,080 | 16.2 | ... | 809.00 |
| 1980–1984 | 2,978,540 | 10.1 | ... | 934.00 | 1,360,960 | 8.9 | ... | 991.10 | 1,617,580 | 11.3 | ... | 886.00 |
| 1975–1979 | 1,382,170 | 4.7 | ... | 967.70 | 519,330 | 3.4 | ... | 1,039.60 | 862,840 | 6.0 | ... | 924.40 |
| 1970–1974 | 449,070 | 1.5 | ... | 879.80 | 127,450 | 0.8 | ... | 912.60 | 321,620 | 2.3 | ... | 866.70 |
| 1965–1969 | 74,500 | 0.3 | ... | 818.40 | 14,860 | 0.1 | ... | 848.60 | 59,640 | 0.4 | ... | 810.90 |
| Before 1965 | 7,020 | ^b | ... | 709.10 | 950 | ^b | ... | 691.00 | 6,070 | ^b | ... | 711.90 |
| <i>Single-year data</i> | | | | | | | | | | | | |
| 2003 | 1,650,310 | 5.6 | 5.6 | 958.90 | 888,200 | 5.8 | 5.8 | 1,125.90 | 762,110 | 5.3 | 5.3 | 764.30 |
| 2002 | 1,712,090 | 5.8 | 11.4 | 959.10 | 932,970 | 6.1 | 11.9 | 1,116.90 | 779,120 | 5.5 | 10.8 | 770.20 |
| 2001 | 1,638,680 | 5.5 | 16.9 | 939.80 | 894,660 | 5.9 | 17.8 | 1,089.10 | 744,020 | 5.2 | 16.0 | 760.30 |
| 2000 | 1,777,980 | 6.0 | 22.9 | 960.60 | 987,310 | 6.5 | 24.3 | 1,111.20 | 790,670 | 5.5 | 21.5 | 772.60 |
| 1999 | 1,553,720 | 5.3 | 28.2 | 926.90 | 851,690 | 5.6 | 29.9 | 1,068.50 | 702,030 | 4.9 | 26.4 | 755.10 |
| 1998 | 1,439,420 | 4.9 | 33.1 | 906.40 | 778,080 | 5.1 | 35.0 | 1,041.80 | 661,340 | 4.6 | 31.1 | 747.10 |
| 1997 | 1,405,230 | 4.8 | 37.8 | 902.40 | 751,450 | 4.9 | 39.9 | 1,037.00 | 653,780 | 4.6 | 35.6 | 747.70 |
| 1996 | 1,407,100 | 4.8 | 42.6 | 901.40 | 732,500 | 4.8 | 44.7 | 1,029.40 | 674,600 | 4.7 | 40.4 | 762.40 |
| 1995 | 1,309,800 | 4.4 | 47.0 | 906.10 | 718,910 | 4.7 | 49.4 | 1,029.20 | 590,890 | 4.1 | 44.5 | 756.40 |
| 1994 | 1,282,450 | 4.3 | 51.4 | 907.90 | 701,400 | 4.6 | 54.0 | 1,028.20 | 581,050 | 4.1 | 48.6 | 762.70 |
| 1993 | 1,251,710 | 4.2 | 55.6 | 906.30 | 688,200 | 4.5 | 58.5 | 1,021.10 | 563,510 | 3.9 | 52.5 | 765.90 |
| 1992 | 1,234,250 | 4.2 | 59.8 | 908.40 | 675,630 | 4.4 | 62.9 | 1,021.30 | 558,620 | 3.9 | 56.4 | 771.80 |
| 1991 | 1,158,470 | 3.9 | 63.7 | 909.70 | 629,240 | 4.1 | 67.1 | 1,018.30 | 529,230 | 3.7 | 60.1 | 780.60 |
| 1990 | 1,118,390 | 3.8 | 67.5 | 911.40 | 595,590 | 3.9 | 71.0 | 1,017.20 | 522,800 | 3.7 | 63.8 | 790.80 |
| 1989 | 1,051,090 | 3.6 | 71.0 | 903.30 | 549,660 | 3.6 | 74.6 | 1,003.00 | 501,430 | 3.5 | 67.3 | 794.00 |
| 1988 | 994,470 | 3.4 | 74.4 | 896.40 | 511,880 | 3.4 | 77.9 | 988.20 | 482,590 | 3.4 | 70.6 | 799.00 |
| 1987 | 944,790 | 3.2 | 77.6 | 898.80 | 480,110 | 3.1 | 81.1 | 984.70 | 464,680 | 3.3 | 73.9 | 810.10 |
| 1986 | 907,520 | 3.1 | 80.7 | 894.20 | 457,810 | 3.0 | 84.1 | 970.40 | 449,710 | 3.1 | 77.0 | 816.70 |
| 1985 | 818,760 | 2.8 | 83.4 | 891.20 | 405,090 | 2.7 | 86.7 | 954.20 | 413,670 | 2.9 | 79.9 | 829.60 |
| 1984 | 728,120 | 2.5 | 85.9 | 891.70 | 349,840 | 2.3 | 89.0 | 946.70 | 378,280 | 2.6 | 82.6 | 840.80 |
| 1983 | 678,510 | 2.3 | 88.2 | 909.20 | 317,520 | 2.1 | 91.1 | 960.30 | 360,990 | 2.5 | 85.1 | 864.30 |
| 1982 | 595,630 | 2.0 | 90.2 | 931.20 | 271,870 | 1.8 | 92.9 | 983.30 | 323,760 | 2.3 | 87.4 | 887.50 |
| 1981 | 517,210 | 1.8 | 92.0 | 978.30 | 229,230 | 1.5 | 94.4 | 1,044.50 | 287,980 | 2.0 | 89.4 | 925.60 |
| 1980 | 459,070 | 1.6 | 93.5 | 991.40 | 192,500 | 1.3 | 95.7 | 1,069.70 | 266,570 | 1.9 | 91.3 | 934.90 |
| 1979 | 388,900 | 1.3 | 94.8 | 998.00 | 155,110 | 1.0 | 96.7 | 1,080.70 | 233,790 | 1.6 | 92.9 | 943.20 |
| 1978 | 320,240 | 1.1 | 95.9 | 984.00 | 122,260 | 0.8 | 97.5 | 1,062.80 | 197,980 | 1.4 | 94.3 | 935.30 |
| 1977 | 250,450 | 0.8 | 96.8 | 963.50 | 94,710 | 0.6 | 98.1 | 1,039.90 | 155,740 | 1.1 | 95.4 | 917.10 |
| 1976 | 233,250 | 0.8 | 97.6 | 937.70 | 82,080 | 0.5 | 98.6 | 989.20 | 151,170 | 1.1 | 96.4 | 909.80 |
| 1975 | 189,330 | 0.6 | 98.2 | 920.40 | 65,170 | 0.4 | 99.1 | 961.40 | 124,160 | 0.9 | 97.3 | 898.80 |

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B4—Number, percentage, and average monthly benefit, by year of entitlement as retired worker and sex, December 2003—Continued

| Year of entitlement | All retired workers | | | | Men | | | | Women | | | |
|---------------------|---------------------|--------------------------|--------------------------------------|-----------------------------------|--------|--------------------------|--------------------------------------|-----------------------------------|---------|--------------------------|--------------------------------------|-----------------------------------|
| | Number | Percent-age distribution | Cumula-tive percent-age ^a | Average monthly benefit (dollars) | Number | Percent-age distribution | Cumula-tive percent-age ^a | Average monthly benefit (dollars) | Number | Percent-age distribution | Cumula-tive percent-age ^a | Average monthly benefit (dollars) |
| 1974 | 148,880 | 0.5 | 98.7 | 895.10 | 46,120 | 0.3 | 99.4 | 934.20 | 102,760 | 0.7 | 98.0 | 877.50 |
| 1973 | 114,360 | 0.4 | 99.1 | 881.90 | 33,080 | 0.2 | 99.6 | 902.90 | 81,280 | 0.6 | 98.6 | 873.40 |
| 1972 | 83,510 | 0.3 | 99.4 | 874.90 | 22,540 | 0.1 | 99.7 | 913.70 | 60,970 | 0.4 | 99.0 | 860.60 |
| 1971 | 60,670 | 0.2 | 99.6 | 862.40 | 15,510 | 0.1 | 99.8 | 898.10 | 45,160 | 0.3 | 99.3 | 850.10 |
| 1970 | 41,650 | 0.1 | 99.7 | 854.10 | 10,200 | 0.1 | 99.9 | 866.60 | 31,450 | 0.2 | 99.5 | 850.00 |
| 1969 | 28,940 | 0.1 | 99.8 | 837.10 | 6,200 | b | 99.9 | 862.40 | 22,740 | 0.2 | 99.7 | 830.20 |
| 1968 | 19,780 | 0.1 | 99.9 | 826.70 | 4,040 | b | 100.0 | 835.80 | 15,740 | 0.1 | 99.8 | 824.30 |
| 1967 | 12,660 | b | 99.9 | 805.80 | 2,410 | b | 100.0 | 841.70 | 10,250 | 0.1 | 99.9 | 797.40 |
| 1966 | 8,080 | b | 100.0 | 770.00 | 1,280 | b | 100.0 | 831.90 | 6,800 | b | 99.9 | 758.30 |
| 1965 | 5,040 | b | 100.0 | 788.50 | 930 | b | 100.0 | 852.40 | 4,110 | b | 100.0 | 774.00 |

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.

a. Represents those entitled in specified year or later.

b. Less than 0.05 percent.

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 sex and age, December 1940–2003, selected years

| Year | Number (thousands) | Average age | Percentage distribution | | | | | | |
|------------|-----------------------|-------------|-------------------------|-------|-------|-------|-------|-------|-------------|
| | | | Total, 62 or older | 62–64 | 65–69 | 70–74 | 75–79 | 80–84 | 85 or older |
| <i>Men</i> | | | | | | | | | |
| 1940 | 99 | 68.8 | 100.0 | ... | 74.4 | 17.4 | 6.4 | 1.6 | 0.2 |
| 1945 | 447 | 71.7 | 100.0 | ... | 39.9 | 40.2 | 15.1 | 4.0 | 0.7 |
| 1950 | 1,469 | 72.2 | 100.0 | ... | 39.1 | 33.7 | 20.2 | 5.9 | 1.2 |
| 1955 | 3,252 | 72.7 | 100.0 | ... | 35.7 | 34.8 | 20.0 | 7.6 | 1.9 |
| 1960 | 5,217 | 73.2 | 100.0 | ... | 33.8 | 33.1 | 21.1 | 9.0 | 3.1 |
| 1965 | 6,825 | 72.9 | 100.0 | 6.9 | 29.7 | 29.5 | 19.9 | 9.9 | 4.1 |
| 1970 | 7,688 | 72.6 | 100.0 | 7.5 | 30.1 | 26.9 | 19.6 | 10.6 | 5.3 |
| 1975 | 9,163 | 72.3 | 100.0 | 9.3 | 32.2 | 25.6 | 17.1 | 10.1 | 5.7 |
| 1980 | 10,461 | 72.2 | 100.0 | 9.5 | 32.1 | 25.8 | 16.9 | 9.5 | 6.1 |
| 1985 | 11,817 | 72.3 | 100.0 | 10.9 | 30.2 | 25.9 | 17.3 | 9.6 | 6.1 |
| 1986 | 12,080 | 72.4 | 100.0 | 10.9 | 30.3 | 25.7 | 17.3 | 9.7 | 6.1 |
| 1987 | 12,295 | 72.4 | 100.0 | 10.9 | 30.2 | 25.5 | 17.4 | 9.9 | 6.1 |
| 1988 | 12,483 | 72.4 | 100.0 | 10.7 | 30.0 | 25.5 | 17.6 | 10.0 | 6.2 |
| 1989 | 12,718 | 72.5 | 100.0 | 10.5 | 30.1 | 25.2 | 17.8 | 10.1 | 6.3 |
| 1990 | 12,985 | 72.5 | 100.0 | 10.3 | 30.0 | 25.3 | 17.8 | 10.2 | 6.4 |
| 1991 | 13,227 | 72.6 | 100.0 | 10.2 | 29.5 | 25.7 | 17.9 | 10.3 | 6.4 |
| 1992 | 13,474 | 72.7 | 100.0 | 10.0 | 29.2 | 25.8 | 17.8 | 10.5 | 6.6 |
| 1993 | 13,649 | 72.8 | 100.0 | 9.9 | 28.9 | 25.9 | 17.9 | 10.7 | 6.8 |
| 1994 | 13,795 | 72.8 | 100.0 | 9.8 | 28.3 | 26.2 | 17.9 | 10.9 | 6.9 |
| 1995 | 13,915 | 72.9 | 100.0 | 9.5 | 28.0 | 26.1 | 18.3 | 11.1 | 7.0 |
| 1996 | 14,012 | 73.1 | 100.0 | 9.2 | 27.6 | 25.8 | 18.9 | 11.3 | 7.2 |
| 1997 | 14,126 | 73.2 | 100.0 | 9.0 | 27.2 | 25.8 | 19.2 | 11.4 | 7.4 |
| 1998 | 14,206 | 73.3 | 100.0 | 9.0 | 26.6 | 25.6 | 19.5 | 11.6 | 7.6 |
| 1999 | 14,329 | 73.3 | 100.0 | 9.1 | 26.4 | 25.2 | 19.8 | 11.7 | 7.8 |
| 2000 | 14,772 | 73.2 | 100.0 | 9.0 | 27.6 | 24.6 | 19.3 | 11.7 | 7.8 |
| 2001 | 14,930 | 73.3 | 100.0 | 8.9 | 27.6 | 24.3 | 19.1 | 12.1 | 7.9 |
| 2002 | 15,070 | 73.3 | 100.0 | 8.8 | 27.9 | 24.0 | 19.1 | 12.4 | 7.8 |
| 2003 | 15,254 | 73.3 | 100.0 | 8.7 | 27.9 | 23.5 | 19.0 | 12.6 | 8.2 |

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B5—Number, average age, and percentage distribution, by sex and age, December 1940–2003, selected years—*Continued*

| Year | Number (thousands) | Average age | Percentage distribution | | | | | | |
|--------------|-----------------------|-------------|-------------------------|-------|-------|-------|-------|-------|-------------|
| | | | Total, 62 or older | 62–64 | 65–69 | 70–74 | 75–79 | 80–84 | 85 or older |
| Women | | | | | | | | | |
| 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 |
| 2002 | 14,096 | 74.6 | 100.0 | 8.8 | 23.9 | 21.3 | 18.7 | 14.0 | 13.3 |
| 2003 | 14,294 | 74.5 | 100.0 | 8.8 | 24.3 | 21.0 | 18.5 | 14.0 | 13.4 |

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1988 and 1990–2003 are based on a 10 percent sample. All other years are 100 percent data.

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

... = not applicable.

a. Less than 0.05 percent.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B6—Number and percentage distribution with and without reduction for early retirement, by monthly benefit and sex, December 2003

| 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 | 29,547,530 | 100.0 | 8,300,290 | 100.0 | 21,247,240 | 100.0 |
| Less than 400.00 | 1,953,140 | 6.6 | 392,890 | 4.7 | 1,560,250 | 7.3 |
| 400.00–449.90 | 752,140 | 2.5 | 94,980 | 1.1 | 657,160 | 3.1 |
| 450.00–499.90 | 1,080,850 | 3.7 | 154,450 | 1.9 | 926,400 | 4.4 |
| 500.00–549.90 | 1,428,280 | 4.8 | 221,540 | 2.7 | 1,206,740 | 5.7 |
| 550.00–599.90 | 1,421,120 | 4.8 | 259,150 | 3.1 | 1,161,970 | 5.5 |
| 600.00–649.90 | 1,303,450 | 4.4 | 287,530 | 3.5 | 1,015,920 | 4.8 |
| 650.00–699.90 | 1,232,330 | 4.2 | 303,360 | 3.7 | 928,970 | 4.4 |
| 700.00–749.90 | 1,170,130 | 4.0 | 296,780 | 3.6 | 873,350 | 4.1 |
| 750.00–799.90 | 1,156,220 | 3.9 | 284,340 | 3.4 | 871,880 | 4.1 |
| 800.00–849.90 | 1,202,190 | 4.1 | 289,120 | 3.5 | 913,070 | 4.3 |
| 850.00–899.90 | 1,274,520 | 4.3 | 294,350 | 3.5 | 980,170 | 4.6 |
| 900.00–949.90 | 1,380,480 | 4.7 | 304,110 | 3.7 | 1,076,370 | 5.1 |
| 950.00–999.90 | 1,491,850 | 5.0 | 307,980 | 3.7 | 1,183,870 | 5.6 |
| 1,000.00–1,049.90 | 1,508,890 | 5.1 | 316,200 | 3.8 | 1,192,690 | 5.6 |
| 1,050.00–1,099.90 | 1,675,480 | 5.7 | 328,490 | 4.0 | 1,346,990 | 6.3 |
| 1,100.00–1,149.90 | 1,515,160 | 5.1 | 325,790 | 3.9 | 1,189,370 | 5.6 |
| 1,150.00–1,199.90 | 1,293,740 | 4.4 | 329,690 | 4.0 | 964,050 | 4.5 |
| 1,200.00–1,249.90 | 1,170,820 | 4.0 | 346,870 | 4.2 | 823,950 | 3.9 |
| 1,250.00–1,299.90 | 1,048,720 | 3.6 | 370,220 | 4.5 | 678,500 | 3.2 |
| 1,300.00–1,349.90 | 959,030 | 3.2 | 407,510 | 4.9 | 551,520 | 2.6 |
| 1,350.00–1,399.90 | 808,460 | 2.7 | 400,610 | 4.8 | 407,850 | 1.9 |
| 1,400.00–1,449.90 | 604,470 | 2.0 | 346,530 | 4.2 | 257,940 | 1.2 |
| 1,450.00–1,499.90 | 464,280 | 1.6 | 309,890 | 3.7 | 154,390 | 0.7 |
| 1,500.00 or more | 1,651,780 | 5.6 | 1,327,910 | 16.0 | 323,870 | 1.5 |
| Average benefit (dollars) | 922.10 | | 1,087.10 | | 857.60 | |
| Men | 15,253,930 | 100.0 | 4,712,990 | 100.0 | 10,540,940 | 100.0 |
| Less than 400.00 | 834,410 | 5.5 | 185,390 | 3.9 | 649,020 | 6.2 |
| 400.00–449.90 | 232,310 | 1.5 | 37,010 | 0.8 | 195,300 | 1.9 |
| 450.00–499.90 | 280,110 | 1.8 | 55,910 | 1.2 | 224,200 | 2.1 |
| 500.00–549.90 | 314,560 | 2.1 | 75,210 | 1.6 | 239,350 | 2.3 |
| 550.00–599.90 | 332,850 | 2.2 | 81,340 | 1.7 | 251,510 | 2.4 |
| 600.00–649.90 | 355,720 | 2.3 | 83,560 | 1.8 | 272,160 | 2.6 |
| 650.00–699.90 | 381,360 | 2.5 | 84,820 | 1.8 | 296,540 | 2.8 |
| 700.00–749.90 | 419,500 | 2.8 | 88,790 | 1.9 | 330,710 | 3.1 |
| 750.00–799.90 | 463,910 | 3.0 | 93,760 | 2.0 | 370,150 | 3.5 |
| 800.00–849.90 | 530,010 | 3.5 | 102,180 | 2.2 | 427,830 | 4.1 |
| 850.00–899.90 | 611,790 | 4.0 | 114,630 | 2.4 | 497,160 | 4.7 |
| 900.00–949.90 | 724,660 | 4.8 | 125,540 | 2.7 | 599,120 | 5.7 |
| 950.00–999.90 | 846,330 | 5.5 | 134,180 | 2.8 | 712,150 | 6.8 |
| 1,000.00–1,049.90 | 898,080 | 5.9 | 145,770 | 3.1 | 752,310 | 7.1 |
| 1,050.00–1,099.90 | 1,109,980 | 7.3 | 167,410 | 3.6 | 942,570 | 8.9 |
| 1,100.00–1,149.90 | 1,031,010 | 6.8 | 178,750 | 3.8 | 852,260 | 8.1 |
| 1,150.00–1,199.90 | 894,760 | 5.9 | 201,850 | 4.3 | 692,910 | 6.6 |
| 1,200.00–1,249.90 | 825,490 | 5.4 | 231,810 | 4.9 | 593,680 | 5.6 |
| 1,250.00–1,299.90 | 753,990 | 4.9 | 264,150 | 5.6 | 489,840 | 4.6 |
| 1,300.00–1,349.90 | 706,010 | 4.6 | 305,690 | 6.5 | 400,320 | 3.8 |
| 1,350.00–1,399.90 | 606,940 | 4.0 | 310,500 | 6.6 | 296,440 | 2.8 |
| 1,400.00–1,449.90 | 455,780 | 3.0 | 272,880 | 5.8 | 182,900 | 1.7 |
| 1,450.00–1,499.90 | 350,880 | 2.3 | 249,250 | 5.3 | 101,630 | 1.0 |
| 1,500.00 or more | 1,293,490 | 8.5 | 1,122,610 | 23.8 | 170,880 | 1.6 |
| Average benefit (dollars) | 1,038.90 | | 1,220.40 | | 957.70 | |

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B6—Number and percentage distribution with and without reduction for early retirement, by monthly benefit and sex, December 2003—Continued

| Monthly benefit (dollars) and sex | Total | | Without reduction for early retirement | | With reduction for early retirement | |
|-----------------------------------|------------|---------|--|---------|-------------------------------------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| Women | 14,293,600 | 100.0 | 3,587,300 | 100.0 | 10,706,300 | 100.0 |
| Less than 400.00 | 1,118,730 | 7.8 | 207,500 | 5.8 | 911,230 | 8.5 |
| 400.00–449.90 | 519,830 | 3.6 | 57,970 | 1.6 | 461,860 | 4.3 |
| 450.00–499.90 | 800,740 | 5.6 | 98,540 | 2.7 | 702,200 | 6.6 |
| 500.00–549.90 | 1,113,720 | 7.8 | 146,330 | 4.1 | 967,390 | 9.0 |
| 550.00–599.90 | 1,088,270 | 7.6 | 177,810 | 5.0 | 910,460 | 8.5 |
| 600.00–649.90 | 947,730 | 6.6 | 203,970 | 5.7 | 743,760 | 6.9 |
| 650.00–699.90 | 850,970 | 6.0 | 218,540 | 6.1 | 632,430 | 5.9 |
| 700.00–749.90 | 750,630 | 5.3 | 207,990 | 5.8 | 542,640 | 5.1 |
| 750.00–799.90 | 692,310 | 4.8 | 190,580 | 5.3 | 501,730 | 4.7 |
| 800.00–849.90 | 672,180 | 4.7 | 186,940 | 5.2 | 485,240 | 4.5 |
| 850.00–899.90 | 662,730 | 4.6 | 179,720 | 5.0 | 483,010 | 4.5 |
| 900.00–949.90 | 655,820 | 4.6 | 178,570 | 5.0 | 477,250 | 4.5 |
| 950.00–999.90 | 645,520 | 4.5 | 173,800 | 4.8 | 471,720 | 4.4 |
| 1,000.00–1,049.90 | 610,810 | 4.3 | 170,430 | 4.8 | 440,380 | 4.1 |
| 1,050.00–1,099.90 | 565,500 | 4.0 | 161,080 | 4.5 | 404,420 | 3.8 |
| 1,100.00–1,149.90 | 484,150 | 3.4 | 147,040 | 4.1 | 337,110 | 3.1 |
| 1,150.00–1,199.90 | 398,980 | 2.8 | 127,840 | 3.6 | 271,140 | 2.5 |
| 1,200.00–1,249.90 | 345,330 | 2.4 | 115,060 | 3.2 | 230,270 | 2.2 |
| 1,250.00–1,299.90 | 294,730 | 2.1 | 106,070 | 3.0 | 188,660 | 1.8 |
| 1,300.00–1,349.90 | 253,020 | 1.8 | 101,820 | 2.8 | 151,200 | 1.4 |
| 1,350.00–1,399.90 | 201,520 | 1.4 | 90,110 | 2.5 | 111,410 | 1.0 |
| 1,400.00–1,449.90 | 148,690 | 1.0 | 73,650 | 2.1 | 75,040 | 0.7 |
| 1,450.00–1,499.90 | 113,400 | 0.8 | 60,640 | 1.7 | 52,760 | 0.5 |
| 1,500.00 or more | 358,290 | 2.5 | 205,300 | 5.7 | 152,990 | 1.4 |
| Average benefit (dollars) | 797.50 | | 912.00 | | 759.10 | |

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).

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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 2003

| 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 | 29,547,530 | 100.0 | 8,300,290 | 100.0 | 21,247,240 | 100.0 |
| Less than 400.00 | 3,199,470 | 10.8 | 659,590 | 7.9 | 2,539,880 | 12.0 |
| 400.00–449.90 | 669,570 | 2.3 | 140,420 | 1.7 | 529,150 | 2.5 |
| 450.00–499.90 | 1,040,450 | 3.5 | 235,940 | 2.8 | 804,510 | 3.8 |
| 500.00–549.90 | 1,240,570 | 4.2 | 291,500 | 3.5 | 949,070 | 4.5 |
| 550.00–599.90 | 1,249,040 | 4.2 | 290,040 | 3.5 | 959,000 | 4.5 |
| 600.00–649.90 | 1,239,440 | 4.2 | 290,660 | 3.5 | 948,780 | 4.5 |
| 650.00–699.90 | 1,154,700 | 3.9 | 282,480 | 3.4 | 872,220 | 4.1 |
| 700.00–749.90 | 1,102,690 | 3.7 | 274,520 | 3.3 | 828,170 | 3.9 |
| 750.00–799.90 | 1,081,200 | 3.7 | 283,690 | 3.4 | 797,510 | 3.8 |
| 800.00–849.90 | 1,051,560 | 3.6 | 288,160 | 3.5 | 763,400 | 3.6 |
| 850.00–899.90 | 1,019,040 | 3.4 | 290,930 | 3.5 | 728,110 | 3.4 |
| 900.00–949.90 | 1,007,270 | 3.4 | 291,690 | 3.5 | 715,580 | 3.4 |
| 950.00–999.90 | 998,150 | 3.4 | 289,760 | 3.5 | 708,390 | 3.3 |
| 1,000.00–1,049.90 | 990,390 | 3.4 | 287,410 | 3.5 | 702,980 | 3.3 |
| 1,050.00–1,099.90 | 1,024,850 | 3.5 | 301,850 | 3.6 | 723,000 | 3.4 |
| 1,100.00–1,149.90 | 1,036,070 | 3.5 | 294,150 | 3.5 | 741,920 | 3.5 |
| 1,150.00–1,199.90 | 1,143,390 | 3.9 | 315,610 | 3.8 | 827,780 | 3.9 |
| 1,200.00–1,249.90 | 1,194,860 | 4.0 | 345,980 | 4.2 | 848,880 | 4.0 |
| 1,250.00–1,299.90 | 1,218,470 | 4.1 | 381,580 | 4.6 | 836,890 | 3.9 |
| 1,300.00–1,349.90 | 1,433,000 | 4.9 | 445,840 | 5.4 | 987,160 | 4.6 |
| 1,350.00–1,399.90 | 1,336,030 | 4.5 | 421,640 | 5.1 | 914,390 | 4.3 |
| 1,400.00–1,449.90 | 1,010,140 | 3.4 | 352,840 | 4.3 | 657,300 | 3.1 |
| 1,450.00–1,499.90 | 803,430 | 2.7 | 316,790 | 3.8 | 486,640 | 2.3 |
| 1,500.00 or more | 2,303,750 | 7.8 | 927,220 | 11.2 | 1,376,530 | 6.5 |
| Average primary insurance amount (dollars) | 935.90 | | 1,012.70 | | 905.90 | |
| Men | 15,253,930 | 100.0 | 4,712,990 | 100.0 | 10,540,940 | 100.0 |
| Less than 400.00 | 675,830 | 4.4 | 196,120 | 4.2 | 479,710 | 4.6 |
| 400.00–449.90 | 138,470 | 0.9 | 38,820 | 0.8 | 99,650 | 0.9 |
| 450.00–499.90 | 205,520 | 1.3 | 61,970 | 1.3 | 143,550 | 1.4 |
| 500.00–549.90 | 255,610 | 1.7 | 78,960 | 1.7 | 176,650 | 1.7 |
| 550.00–599.90 | 274,830 | 1.8 | 82,820 | 1.8 | 192,010 | 1.8 |
| 600.00–649.90 | 289,390 | 1.9 | 84,780 | 1.8 | 204,610 | 1.9 |
| 650.00–699.90 | 291,770 | 1.9 | 85,680 | 1.8 | 206,090 | 2.0 |
| 700.00–749.90 | 307,990 | 2.0 | 87,670 | 1.9 | 220,320 | 2.1 |
| 750.00–799.90 | 335,010 | 2.2 | 96,320 | 2.0 | 238,690 | 2.3 |
| 800.00–849.90 | 362,570 | 2.4 | 104,300 | 2.2 | 258,270 | 2.5 |
| 850.00–899.90 | 399,990 | 2.6 | 117,010 | 2.5 | 282,980 | 2.7 |
| 900.00–949.90 | 443,360 | 2.9 | 126,970 | 2.7 | 316,390 | 3.0 |
| 950.00–999.90 | 491,800 | 3.2 | 136,970 | 2.9 | 354,830 | 3.4 |
| 1,000.00–1,049.90 | 548,230 | 3.6 | 150,090 | 3.2 | 398,140 | 3.8 |
| 1,050.00–1,099.90 | 630,040 | 4.1 | 174,240 | 3.7 | 455,800 | 4.3 |
| 1,100.00–1,149.90 | 701,880 | 4.6 | 185,430 | 3.9 | 516,450 | 4.9 |
| 1,150.00–1,199.90 | 854,640 | 5.6 | 218,320 | 4.6 | 636,320 | 6.0 |
| 1,200.00–1,249.90 | 950,980 | 6.2 | 258,140 | 5.5 | 692,840 | 6.6 |
| 1,250.00–1,299.90 | 1,007,440 | 6.6 | 300,930 | 6.4 | 706,510 | 6.7 |
| 1,300.00–1,349.90 | 1,222,400 | 8.0 | 360,580 | 7.7 | 861,820 | 8.2 |
| 1,350.00–1,399.90 | 1,172,200 | 7.7 | 351,490 | 7.5 | 820,710 | 7.8 |
| 1,400.00–1,449.90 | 894,890 | 5.9 | 301,530 | 6.4 | 593,360 | 5.6 |
| 1,450.00–1,499.90 | 713,440 | 4.7 | 277,700 | 5.9 | 435,740 | 4.1 |
| 1,500.00 or more | 2,085,650 | 13.7 | 836,150 | 17.7 | 1,249,500 | 11.9 |
| Average primary insurance amount (dollars) | 1,145.90 | | 1,179.10 | | 1,131.00 | |

(Continued)

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 2003—Continued

| Primary insurance amount (dollars) and sex | Total | | Without reduction for early retirement | | With reduction for early retirement | |
|--|------------|---------|--|---------|-------------------------------------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| Women | 14,293,600 | 100.0 | 3,587,300 | 100.0 | 10,706,300 | 100.0 |
| Less than 400.00 | 2,523,640 | 17.7 | 463,470 | 12.9 | 2,060,170 | 19.2 |
| 400.00–449.90 | 531,100 | 3.7 | 101,600 | 2.8 | 429,500 | 4.0 |
| 450.00–499.90 | 834,930 | 5.8 | 173,970 | 4.9 | 660,960 | 6.2 |
| 500.00–549.90 | 984,960 | 6.9 | 212,540 | 5.9 | 772,420 | 7.2 |
| 550.00–599.90 | 974,210 | 6.8 | 207,220 | 5.8 | 766,990 | 7.2 |
| 600.00–649.90 | 950,050 | 6.6 | 205,880 | 5.7 | 744,170 | 7.0 |
| 650.00–699.90 | 862,930 | 6.0 | 196,800 | 5.5 | 666,130 | 6.2 |
| 700.00–749.90 | 794,700 | 5.6 | 186,850 | 5.2 | 607,850 | 5.7 |
| 750.00–799.90 | 746,190 | 5.2 | 187,370 | 5.2 | 558,820 | 5.2 |
| 800.00–849.90 | 688,990 | 4.8 | 183,860 | 5.1 | 505,130 | 4.7 |
| 850.00–899.90 | 619,050 | 4.3 | 173,920 | 4.8 | 445,130 | 4.2 |
| 900.00–949.90 | 563,910 | 3.9 | 164,720 | 4.6 | 399,190 | 3.7 |
| 950.00–999.90 | 506,350 | 3.5 | 152,790 | 4.3 | 353,560 | 3.3 |
| 1,000.00–1,049.90 | 442,160 | 3.1 | 137,320 | 3.8 | 304,840 | 2.8 |
| 1,050.00–1,099.90 | 394,810 | 2.8 | 127,610 | 3.6 | 267,200 | 2.5 |
| 1,100.00–1,149.90 | 334,190 | 2.3 | 108,720 | 3.0 | 225,470 | 2.1 |
| 1,150.00–1,199.90 | 288,750 | 2.0 | 97,290 | 2.7 | 191,460 | 1.8 |
| 1,200.00–1,249.90 | 243,880 | 1.7 | 87,840 | 2.4 | 156,040 | 1.5 |
| 1,250.00–1,299.90 | 211,030 | 1.5 | 80,650 | 2.2 | 130,380 | 1.2 |
| 1,300.00–1,349.90 | 210,600 | 1.5 | 85,260 | 2.4 | 125,340 | 1.2 |
| 1,350.00–1,399.90 | 163,830 | 1.1 | 70,150 | 2.0 | 93,680 | 0.9 |
| 1,400.00–1,449.90 | 115,250 | 0.8 | 51,310 | 1.4 | 63,940 | 0.6 |
| 1,450.00–1,499.90 | 89,990 | 0.6 | 39,090 | 1.1 | 50,900 | 0.5 |
| 1,500.00 or more | 218,100 | 1.5 | 91,070 | 2.5 | 127,030 | 1.2 |
| Average primary insurance amount (dollars) | 711.80 | | 794.10 | | 684.20 | |

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).

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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 1956–2003, selected years

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

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 sex, monthly benefit, and age, December 2003

| Monthly benefit (dollars) | Total, 62 or older | 62–64 | 65–69 | 70–74 | 75–79 | 80–84 | 85–89 | 90 or older |
|----------------------------|-----------------------|----------|----------|----------|----------|--------|----------|-------------|
| <i>All retired workers</i> | | | | | | | | |
| Total | | | | | | | | |
| Number (thousands) | 29,548 | 2,587 | 7,730 | 6,584 | 5,550 | 3,921 | 2,127 | 1,048 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Less than 400.00 | 6.6 | 8.6 | 6.7 | 6.7 | 6.2 | 6.4 | 5.3 | 5.9 |
| 400.00–449.90 | 2.5 | 2.9 | 2.4 | 2.6 | 2.7 | 2.6 | 2.0 | 2.0 |
| 450.00–499.90 | 3.7 | 4.6 | 3.3 | 3.7 | 4.1 | 3.8 | 2.5 | 2.6 |
| 500.00–549.90 | 4.8 | 5.7 | 4.9 | 5.5 | 5.0 | 4.1 | 3.2 | 3.2 |
| 550.00–599.90 | 4.8 | 6.6 | 5.5 | 5.1 | 4.2 | 3.9 | 3.1 | 3.2 |
| 600.00–649.90 | 4.4 | 6.5 | 4.8 | 4.4 | 4.1 | 3.8 | 3.1 | 3.4 |
| 650.00–699.90 | 4.2 | 5.3 | 4.5 | 4.3 | 3.8 | 3.7 | 3.2 | 3.7 |
| 700.00–749.90 | 4.0 | 4.2 | 4.2 | 4.1 | 3.7 | 3.7 | 3.3 | 4.1 |
| 750.00–799.90 | 3.9 | 3.7 | 4.0 | 3.9 | 3.7 | 4.0 | 3.8 | 5.0 |
| 800.00–849.90 | 4.1 | 3.5 | 3.9 | 3.9 | 3.9 | 4.5 | 4.5 | 6.5 |
| 850.00–899.90 | 4.3 | 3.4 | 3.7 | 4.0 | 4.2 | 5.4 | 5.2 | 7.3 |
| 900.00–949.90 | 4.7 | 3.4 | 3.7 | 4.2 | 4.6 | 6.8 | 5.9 | 7.4 |
| 950.00–999.90 | 5.0 | 3.3 | 3.7 | 4.4 | 5.3 | 8.6 | 6.1 | 6.6 |
| 1,000.00–1,049.90 | 5.1 | 3.2 | 3.8 | 4.7 | 6.7 | 6.4 | 6.2 | 6.1 |
| 1,050.00–1,099.90 | 5.7 | 3.1 | 4.4 | 6.8 | 7.9 | 4.8 | 5.8 | 5.5 |
| 1,100.00–1,149.90 | 5.1 | 3.1 | 5.0 | 6.6 | 5.4 | 4.3 | 4.8 | 4.3 |
| 1,150.00–1,199.90 | 4.4 | 3.7 | 5.3 | 4.6 | 3.7 | 4.1 | 3.9 | 3.3 |
| 1,200.00–1,249.90 | 4.0 | 6.0 | 4.6 | 3.2 | 3.3 | 4.1 | 3.7 | 2.7 |
| 1,250.00–1,299.90 | 3.5 | 5.9 | 3.8 | 2.8 | 3.3 | 3.6 | 3.6 | 2.4 |
| 1,300.00–1,349.90 | 3.2 | 5.1 | 3.3 | 2.9 | 3.1 | 2.7 | 3.6 | 2.3 |
| 1,350.00–1,399.90 | 2.7 | 4.3 | 2.9 | 2.5 | 2.5 | 1.9 | 3.4 | 2.5 |
| 1,400.00–1,449.90 | 2.0 | 2.4 | 2.4 | 1.9 | 2.0 | 1.3 | 2.5 | 1.9 |
| 1,450.00–1,499.90 | 1.6 | 0.7 | 2.2 | 1.5 | 1.4 | 1.0 | 2.3 | 1.3 |
| 1,500.00 or more | 5.6 | 0.8 | 7.1 | 5.7 | 4.9 | 4.3 | 9.2 | 6.9 |
| Average benefit (dollars) | 922.10 | 858.60 | 930.20 | 912.30 | 920.80 | 910.50 | 1,009.40 | 953.20 |
| <i>Men</i> | | | | | | | | |
| Total | | | | | | | | |
| Number (thousands) | 15,254 | 1,331 | 4,255 | 3,588 | 2,900 | 1,921 | 903 | 354 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Less than 400.00 | 5.5 | 6.6 | 5.5 | 5.5 | 4.9 | 5.6 | 5.0 | 5.3 |
| 400.00–449.90 | 1.5 | 1.4 | 1.3 | 1.6 | 1.6 | 1.7 | 1.6 | 1.8 |
| 450.00–499.90 | 1.8 | 2.2 | 1.7 | 1.8 | 1.9 | 2.0 | 1.7 | 2.1 |
| 500.00–549.90 | 2.1 | 2.3 | 1.9 | 2.0 | 2.1 | 2.2 | 1.9 | 2.5 |
| 550.00–599.90 | 2.2 | 2.3 | 2.0 | 2.2 | 2.2 | 2.4 | 2.0 | 2.4 |
| 600.00–649.90 | 2.3 | 2.4 | 2.2 | 2.4 | 2.4 | 2.5 | 2.1 | 2.6 |
| 650.00–699.90 | 2.5 | 2.5 | 2.3 | 2.6 | 2.5 | 2.7 | 2.3 | 2.8 |
| 700.00–749.90 | 2.8 | 2.8 | 2.6 | 2.8 | 2.7 | 3.1 | 2.5 | 3.2 |
| 750.00–799.90 | 3.0 | 2.9 | 2.8 | 3.1 | 3.1 | 3.5 | 2.8 | 3.8 |
| 800.00–849.90 | 3.5 | 3.2 | 3.1 | 3.5 | 3.4 | 4.3 | 3.4 | 5.8 |
| 850.00–899.90 | 4.0 | 3.3 | 3.4 | 3.9 | 4.0 | 5.7 | 4.1 | 6.2 |
| 900.00–949.90 | 4.8 | 3.6 | 3.7 | 4.4 | 4.7 | 8.2 | 5.3 | 6.2 |
| 950.00–999.90 | 5.5 | 3.9 | 3.9 | 4.9 | 5.7 | 11.1 | 6.0 | 5.9 |
| 1,000.00–1,049.90 | 5.9 | 3.9 | 4.3 | 5.7 | 8.4 | 7.4 | 6.5 | 5.4 |
| 1,050.00–1,099.90 | 7.3 | 4.1 | 5.4 | 9.2 | 11.0 | 5.1 | 6.4 | 5.6 |
| 1,100.00–1,149.90 | 6.8 | 4.3 | 6.7 | 9.2 | 7.0 | 4.6 | 5.0 | 4.7 |
| 1,150.00–1,199.90 | 5.9 | 5.4 | 7.5 | 6.4 | 4.4 | 4.8 | 4.4 | 3.8 |
| 1,200.00–1,249.90 | 5.4 | 9.4 | 6.7 | 4.2 | 4.0 | 5.1 | 4.2 | 3.4 |
| 1,250.00–1,299.90 | 4.9 | 9.8 | 5.5 | 3.6 | 4.2 | 4.5 | 4.3 | 3.3 |
| 1,300.00–1,349.90 | 4.6 | 8.9 | 4.9 | 3.9 | 4.2 | 3.3 | 4.8 | 3.4 |
| 1,350.00–1,399.90 | 4.0 | 7.9 | 4.2 | 3.5 | 3.6 | 2.1 | 4.3 | 3.8 |
| 1,400.00–1,449.90 | 3.0 | 4.3 | 3.6 | 2.7 | 2.8 | 1.5 | 3.2 | 2.9 |
| 1,450.00–1,499.90 | 2.3 | 1.2 | 3.3 | 2.2 | 2.0 | 1.1 | 3.0 | 1.7 |
| 1,500.00 or more | 8.5 | 1.4 | 11.5 | 8.7 | 7.2 | 5.4 | 13.4 | 11.3 |
| Average benefit (dollars) | 1,038.90 | 1,022.50 | 1,073.00 | 1,032.90 | 1,027.10 | 973.60 | 1,098.80 | 1,049.10 |

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B9—Number and percentage distribution, by sex, monthly benefit, and age, December 2003—Continued

| Monthly benefit (dollars) | Total, 62 or older | 62–64 | 65–69 | 70–74 | 75–79 | 80–84 | 85–89 | 90 or older |
|---------------------------|-----------------------|--------|--------|--------|--------|--------|--------|-------------|
| <i>Women</i> | | | | | | | | |
| Total | | | | | | | | |
| Number (thousands) | 14,294 | 1,256 | 3,475 | 2,996 | 2,649 | 2,000 | 1,224 | 693 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Less than 400.00 | 7.8 | 10.6 | 8.3 | 8.1 | 7.6 | 7.1 | 5.5 | 6.1 |
| 400.00–449.90 | 3.6 | 4.5 | 3.7 | 4.0 | 3.9 | 3.5 | 2.3 | 2.1 |
| 450.00–499.90 | 5.6 | 7.1 | 5.4 | 6.0 | 6.6 | 5.6 | 3.0 | 2.8 |
| 500.00–549.90 | 7.8 | 9.4 | 8.5 | 9.8 | 8.2 | 5.9 | 4.1 | 3.5 |
| 550.00–599.90 | 7.6 | 11.1 | 9.8 | 8.6 | 6.5 | 5.4 | 3.9 | 3.7 |
| 600.00–649.90 | 6.6 | 11.0 | 7.9 | 6.8 | 5.9 | 5.0 | 3.8 | 3.9 |
| 650.00–699.90 | 6.0 | 8.2 | 7.2 | 6.3 | 5.3 | 4.5 | 3.9 | 4.2 |
| 700.00–749.90 | 5.3 | 5.6 | 6.3 | 5.6 | 4.8 | 4.4 | 3.9 | 4.6 |
| 750.00–799.90 | 4.8 | 4.6 | 5.5 | 4.8 | 4.4 | 4.4 | 4.5 | 5.6 |
| 800.00–849.90 | 4.7 | 3.9 | 4.8 | 4.4 | 4.3 | 4.8 | 5.3 | 6.9 |
| 850.00–899.90 | 4.6 | 3.4 | 4.2 | 4.0 | 4.5 | 5.1 | 6.0 | 7.9 |
| 900.00–949.90 | 4.6 | 3.2 | 3.8 | 4.0 | 4.6 | 5.5 | 6.3 | 8.0 |
| 950.00–999.90 | 4.5 | 2.7 | 3.5 | 3.8 | 4.9 | 6.2 | 6.2 | 6.9 |
| 1,000.00–1,049.90 | 4.3 | 2.5 | 3.2 | 3.6 | 4.9 | 5.5 | 6.0 | 6.5 |
| 1,050.00–1,099.90 | 4.0 | 2.1 | 3.0 | 3.9 | 4.5 | 4.6 | 5.5 | 5.5 |
| 1,100.00–1,149.90 | 3.4 | 1.8 | 2.9 | 3.4 | 3.6 | 4.0 | 4.6 | 4.1 |
| 1,150.00–1,199.90 | 2.8 | 1.8 | 2.6 | 2.5 | 2.9 | 3.5 | 3.6 | 3.0 |
| 1,200.00–1,249.90 | 2.4 | 2.3 | 2.0 | 2.0 | 2.6 | 3.1 | 3.3 | 2.3 |
| 1,250.00–1,299.90 | 2.1 | 1.7 | 1.6 | 1.8 | 2.3 | 2.6 | 3.1 | 1.9 |
| 1,300.00–1,349.90 | 1.8 | 1.0 | 1.4 | 1.7 | 2.0 | 2.1 | 2.7 | 1.7 |
| 1,350.00–1,399.90 | 1.4 | 0.6 | 1.2 | 1.3 | 1.4 | 1.6 | 2.6 | 1.8 |
| 1,400.00–1,449.90 | 1.0 | 0.3 | 0.9 | 0.9 | 1.0 | 1.2 | 2.0 | 1.4 |
| 1,450.00–1,499.90 | 0.8 | 0.1 | 0.8 | 0.6 | 0.7 | 0.9 | 1.7 | 1.0 |
| 1,500.00 or more | 2.5 | 0.1 | 1.6 | 2.0 | 2.5 | 3.3 | 6.2 | 4.7 |
| Average benefit (dollars) | 797.50 | 684.90 | 755.40 | 768.00 | 804.40 | 849.90 | 943.60 | 904.10 |

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 primary insurance amount and type of benefit, December 2003

| Primary insurance amount (dollars) | Retired workers | | Wives and husbands | | Children | |
|--|-----------------|---------|--------------------|---------|----------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| Total | 29,547,530 | 100.0 | 2,622,130 | 100.0 | 480,490 | 100.0 |
| Less than 300.00 | 1,733,120 | 5.9 | 70,670 | 2.7 | 12,820 | 2.7 |
| 300.00–349.90 | 841,990 | 2.9 | 27,390 | 1.0 | 5,800 | 1.2 |
| 350.00–399.90 | 624,360 | 2.1 | 23,290 | 0.9 | 5,460 | 1.1 |
| 400.00–449.90 | 669,570 | 2.3 | 24,890 | 1.0 | 5,550 | 1.2 |
| 450.00–499.90 | 1,040,450 | 3.5 | 39,480 | 1.5 | 8,700 | 1.8 |
| 500.00–549.90 | 1,240,570 | 4.2 | 46,800 | 1.8 | 12,940 | 2.7 |
| 550.00–599.90 | 1,249,040 | 4.2 | 48,580 | 1.9 | 14,990 | 3.1 |
| 600.00–649.90 | 1,239,440 | 4.2 | 48,590 | 1.9 | 15,170 | 3.2 |
| 650.00–699.90 | 1,154,700 | 3.9 | 47,430 | 1.8 | 15,310 | 3.2 |
| 700.00–749.90 | 1,102,690 | 3.7 | 50,380 | 1.9 | 15,260 | 3.2 |
| 750.00–799.90 | 1,081,200 | 3.7 | 53,910 | 2.1 | 16,870 | 3.5 |
| 800.00–849.90 | 1,051,560 | 3.6 | 57,290 | 2.2 | 17,540 | 3.7 |
| 850.00–899.90 | 1,019,040 | 3.5 | 62,230 | 2.4 | 17,020 | 3.5 |
| 900.00–949.90 | 1,007,270 | 3.4 | 68,790 | 2.6 | 18,420 | 3.8 |
| 950.00–999.90 | 998,150 | 3.4 | 75,250 | 2.9 | 18,200 | 3.8 |
| 1,000.00–1,049.90 | 990,390 | 3.4 | 82,630 | 3.2 | 18,550 | 3.9 |
| 1,050.00–1,099.90 | 1,024,850 | 3.5 | 94,850 | 3.6 | 19,040 | 4.0 |
| 1,100.00–1,149.90 | 1,036,070 | 3.5 | 108,560 | 4.1 | 19,700 | 4.1 |
| 1,150.00–1,199.90 | 1,143,390 | 3.9 | 143,940 | 5.5 | 21,560 | 4.5 |
| 1,200.00–1,249.90 | 1,194,860 | 4.0 | 169,120 | 6.5 | 21,660 | 4.5 |
| 1,250.00–1,299.90 | 1,218,470 | 4.1 | 188,310 | 7.2 | 21,910 | 4.6 |
| 1,300.00–1,349.90 | 1,433,000 | 4.9 | 232,490 | 8.9 | 26,250 | 5.5 |
| 1,350.00–1,399.90 | 1,336,030 | 4.5 | 228,910 | 8.7 | 25,360 | 5.3 |
| 1,400.00–1,449.90 | 1,010,140 | 3.4 | 173,240 | 6.6 | 20,370 | 4.2 |
| 1,450.00–1,499.90 | 803,430 | 2.7 | 130,520 | 5.0 | 18,910 | 3.9 |
| 1,500.00 or more | 2,303,750 | 7.8 | 324,590 | 12.4 | 67,130 | 14.0 |
| Average primary insurance amount (dollars) | 935.90 | | 1,149.00 | | 1,070.50 | |

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 1940–2003, selected years (in dollars)

| Year | Retired workers | | | Wives | | | Husbands | Children | | | |
|------|-----------------|--------|--------|--------|---|---|----------|----------|--------------|-------------------------|----------|
| | All | Men | Women | All | Entitled solely because of age ^a | Entitled because of children ^b | | All | Under age 18 | Disabled adult children | Students |
| 1940 | 22.60 | 23.17 | 18.37 | 12.13 | 12.13 | ... | ... | 12.22 | 12.22 | ... | ... |
| 1945 | 24.19 | 24.94 | 19.51 | 12.82 | 12.82 | ... | ... | 12.45 | 12.45 | ... | ... |
| 1946 | 24.55 | 25.30 | 19.64 | 12.99 | 12.99 | ... | ... | 12.57 | 12.57 | ... | ... |
| 1947 | 24.90 | 25.68 | 19.91 | 13.17 | 13.17 | ... | ... | 12.77 | 12.77 | ... | ... |
| 1948 | 25.35 | 26.21 | 20.11 | 13.42 | 13.42 | ... | ... | 12.99 | 12.99 | ... | ... |
| 1949 | 26.00 | 26.92 | 20.58 | 13.76 | 13.76 | ... | ... | 13.18 | 13.18 | ... | ... |
| 1950 | 43.86 | 45.67 | 35.05 | 23.60 | 23.79 | 12.85 | 20.01 | 17.05 | 17.05 | ... | ... |
| 1951 | 42.14 | 44.44 | 33.03 | 22.75 | 23.16 | 14.33 | 19.49 | 13.37 | 13.37 | ... | ... |
| 1952 | 49.25 | 52.16 | 39.17 | 26.01 | 26.48 | 16.33 | 22.31 | 14.67 | 14.67 | ... | ... |
| 1953 | 51.10 | 54.46 | 40.66 | 27.08 | 27.53 | 17.97 | 23.10 | 15.79 | 15.79 | ... | ... |
| 1954 | 59.14 | 63.34 | 47.05 | 31.81 | 32.36 | 21.11 | 26.61 | 18.53 | 18.53 | ... | ... |
| 1955 | 61.90 | 66.40 | 49.93 | 33.12 | 33.63 | 22.96 | 27.27 | 20.01 | 20.01 | ... | ... |
| 1956 | 63.09 | 68.23 | 51.16 | 33.76 | 34.22 | 23.64 | 27.90 | 20.63 | 20.63 | ... | ... |
| 1957 | 64.58 | 70.47 | 52.23 | 34.41 | 34.89 | 24.21 | 29.39 | 21.89 | 20.90 | 31.55 | ... |
| 1958 | 66.35 | 72.74 | 53.55 | 35.11 | 35.59 | 25.12 | 30.45 | 22.99 | 21.66 | 32.00 | ... |
| 1959 | 72.78 | 80.11 | 58.81 | 38.24 | 38.68 | 29.39 | 33.85 | 27.34 | 25.61 | 35.08 | ... |
| 1960 | 74.04 | 81.87 | 59.67 | 38.74 | 39.19 | 30.15 | 34.72 | 28.25 | 26.38 | 35.70 | ... |
| 1961 | 75.65 | 83.13 | 62.00 | 39.47 | 40.09 | 29.45 | 36.61 | 27.52 | 25.56 | 36.22 | ... |
| 1962 | 76.19 | 83.79 | 62.61 | 39.64 | 40.35 | 29.55 | 37.05 | 27.39 | 25.44 | 36.35 | ... |
| 1963 | 76.88 | 84.69 | 63.42 | 39.95 | 40.66 | 29.94 | 37.64 | 27.85 | 25.76 | 36.84 | ... |
| 1964 | 77.57 | 85.58 | 64.28 | 40.24 | 40.95 | 30.16 | 38.18 | 28.13 | 25.86 | 37.34 | ... |
| 1965 | 83.92 | 92.59 | 70.07 | 43.64 | 44.41 | 32.60 | 41.69 | 31.98 | 28.27 | 40.64 | 46.75 |
| 1966 | 84.35 | 93.26 | 70.79 | 43.82 | 44.60 | 32.64 | 42.21 | 32.72 | 28.18 | 41.03 | 45.05 |
| 1967 | 85.37 | 94.49 | 71.92 | 44.25 | 45.01 | 32.92 | 42.79 | 33.10 | 28.34 | 41.49 | 45.07 |
| 1968 | 98.86 | 109.08 | 84.24 | 51.22 | 52.13 | 37.66 | 49.29 | 38.12 | 32.44 | 47.79 | 51.08 |
| 1969 | 100.40 | 110.96 | 85.71 | 51.89 | 52.81 | 38.00 | 49.90 | 38.63 | 32.79 | 48.46 | 51.33 |
| 1970 | 118.10 | 130.53 | 101.22 | 61.20 | 62.41 | 43.23 | 58.47 | 44.85 | 37.72 | 56.79 | 59.46 |
| 1971 | 132.17 | 146.13 | 113.60 | 68.36 | 69.82 | 47.07 | 65.25 | 49.36 | 41.08 | 62.57 | 65.93 |
| 1972 | 162.35 | 179.44 | 140.11 | 84.11 | 86.07 | 56.10 | 79.97 | 59.90 | 49.44 | 75.91 | 80.13 |
| 1973 | 166.40 | 182.60 | 145.80 | 84.80 | 86.80 | 56.80 | 80.80 | 61.10 | 50.30 | 77.00 | 82.70 |
| 1974 | 188.20 | 206.56 | 165.47 | 95.77 | 98.08 | 64.24 | 90.90 | 69.63 | 57.10 | 86.61 | 94.21 |
| 1975 | 207.18 | 227.75 | 181.80 | 105.21 | 107.74 | 70.72 | 99.07 | 77.42 | 63.13 | 94.75 | 103.88 |
| 1976 | 224.86 | 247.70 | 197.08 | 114.15 | 116.82 | 77.29 | 106.68 | 85.64 | 69.55 | 102.81 | 113.92 |
| 1977 | 243.00 | 268.40 | 212.60 | 123.30 | 126.20 | 84.20 | 100.90 | 94.90 | 76.90 | 112.30 | 124.60 |
| 1978 | 263.20 | 291.60 | 229.70 | 133.10 | 136.00 | 91.70 | 106.00 | 104.70 | 85.10 | 121.70 | 138.40 |
| 1979 | 294.30 | 326.80 | 256.50 | 148.80 | 151.90 | 102.90 | 116.00 | 119.20 | 97.00 | 137.10 | 157.20 |
| 1980 | 341.40 | 380.20 | 296.80 | 172.50 | 176.00 | 120.40 | 132.10 | 140.00 | 114.30 | 159.80 | 184.00 |
| 1981 | 386.00 | 431.10 | 334.50 | 195.40 | 199.20 | 138.20 | 145.90 | 161.40 | 131.10 | 182.20 | 210.60 |
| 1982 | 419.30 | 469.60 | 362.20 | 213.60 | 216.90 | 148.80 | 156.00 | 165.00 | 145.90 | 198.40 | 179.70 |
| 1983 | 440.80 | 495.00 | 379.60 | 226.50 | 229.50 | 151.30 | 160.90 | 175.80 | 163.20 | 210.10 | 153.50 |
| 1984 | 460.60 | 517.80 | 396.50 | 237.20 | 240.30 | 156.70 | 165.80 | 185.50 | 170.60 | 220.80 | 149.90 |
| 1985 | 478.60 | 538.40 | 412.10 | 247.20 | 250.30 | 161.90 | 169.50 | 197.60 | 177.40 | 230.80 | 232.30 |
| 1986 | 488.50 | 549.80 | 420.50 | 252.70 | 255.70 | 165.10 | 170.40 | 203.80 | 182.50 | 236.80 | 241.20 |
| 1987 | 512.70 | 577.50 | 441.20 | 265.40 | 268.40 | 174.00 | 175.90 | 215.90 | 192.70 | 249.90 | 252.60 |
| 1988 | 536.80 | 604.90 | 462.00 | 278.00 | 281.00 | 182.40 | 181.50 | 227.70 | 201.60 | 263.30 | 265.40 |
| 1989 | 566.90 | 638.90 | 487.90 | 293.80 | 296.80 | 194.00 | 189.10 | 242.40 | 213.80 | 279.30 | 283.70 |
| 1990 | 602.60 | 679.30 | 518.60 | 312.30 | 315.40 | 208.10 | 198.20 | 259.40 | 228.50 | 298.30 | 300.90 |
| 1991 | 629.30 | 709.30 | 541.60 | 326.10 | 329.20 | 219.40 | 203.30 | 272.70 | 240.60 | 312.90 | 306.70 |
| 1992 | 652.60 | 735.50 | 561.80 | 337.90 | 341.00 | 229.30 | 208.20 | 285.20 | 252.30 | 326.00 | 322.20 |
| 1993 | 674.10 | 759.30 | 580.70 | 348.80 | 351.80 | 238.70 | 212.10 | 296.80 | 263.10 | 338.00 | 333.40 |
| 1994 | 697.30 | 785.20 | 610.30 | 360.50 | 363.60 | 248.60 | 216.40 | 309.30 | 275.00 | 351.10 | 349.60 |

(Continued)

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

Table 5.C2—Average monthly benefit, by type of benefit and sex, December 1940–2003, selected years (in dollars)—Continued

| Year | Retired workers | | | Wives | | | Husbands | Children | | | |
|------|-----------------|----------|--------|--------|---|---|----------|----------|--------------|-------------------------|----------|
| | All | Men | Women | All | Entitled solely because of age ^a | Entitled because of children ^b | | All | Under age 18 | Disabled adult children | Students |
| 1995 | 719.80 | 810.20 | 621.20 | 371.90 | 375.00 | 256.70 | 220.80 | 321.50 | 286.70 | 363.80 | 360.30 |
| 1996 | 745.00 | 838.10 | 643.70 | 385.10 | 387.70 | 277.30 | 225.70 | 337.10 | 303.00 | 378.40 | 374.70 |
| 1997 | 765.00 | 860.50 | 662.50 | 394.70 | 397.20 | 286.40 | 228.80 | 349.00 | 314.90 | 389.80 | 388.40 |
| 1998 | 779.70 | 876.90 | 675.90 | 401.70 | 404.00 | 294.90 | 230.50 | 358.40 | 324.30 | 399.00 | 398.00 |
| 1999 | 804.30 | 904.60 | 697.50 | 413.00 | 415.30 | 307.50 | 234.50 | 372.40 | 338.90 | 413.00 | 417.30 |
| 2000 | 844.50 | 951.10 | 729.90 | 431.30 | 433.50 | 328.90 | 242.70 | 394.80 | 363.40 | 433.70 | 444.40 |
| 2001 | 874.40 | 984.60 | 756.20 | 445.10 | 447.20 | 345.30 | 250.30 | 412.60 | 382.20 | 451.00 | 462.60 |
| 2002 | 895.00 | 1,007.80 | 774.10 | 453.90 | 456.00 | 358.00 | 256.10 | 426.40 | 397.10 | 463.90 | 477.00 |
| 2003 | 922.10 | 1,038.70 | 797.60 | 465.90 | 467.80 | 374.60 | 263.10 | 444.20 | 415.80 | 480.60 | 498.60 |

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

NOTE: . . . = not applicable.

- a. Aged 62 or older. Includes wives aged 65 or older with children.
- b. Under age 65 with entitled children in their care.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D1—Number, percentage, and average monthly benefit, by year of entitlement as disabled worker and sex, December 2003

| Year of entitlement | All disabled workers | | | | Men | | | | Women | | | |
|---------------------|----------------------|-------------------------|------------------------------------|-----------------------------------|-----------|-------------------------|------------------------------------|-----------------------------------|-----------|-------------------------|------------------------------------|-----------------------------------|
| | Number | Percentage distribution | Cumulative percentage ^a | Average monthly benefit (dollars) | Number | Percentage distribution | Cumulative percentage ^a | Average monthly benefit (dollars) | Number | Percentage distribution | Cumulative percentage ^a | Average monthly benefit (dollars) |
| Total | 5,867,460 | 100.0 | ... | 861.70 | 3,225,850 | 100.0 | ... | 965.90 | 2,641,610 | 100.0 | ... | 734.40 |
| 2000–2003 | 1,891,640 | 32.2 | ... | 945.00 | 1,021,250 | 31.7 | ... | 1,074.10 | 870,390 | 32.9 | ... | 793.60 |
| 1995–1999 | 1,825,190 | 31.1 | ... | 844.90 | 941,950 | 29.2 | ... | 961.40 | 883,240 | 33.4 | ... | 720.60 |
| 1990–1994 | 1,195,700 | 20.4 | ... | 799.90 | 655,300 | 20.3 | ... | 896.10 | 540,400 | 20.5 | ... | 683.30 |
| 1985–1989 | 494,850 | 8.4 | ... | 782.80 | 297,270 | 9.2 | ... | 857.20 | 197,580 | 7.5 | ... | 671.00 |
| 1980–1984 | 233,500 | 4.0 | ... | 755.00 | 154,430 | 4.8 | ... | 805.30 | 79,070 | 3.0 | ... | 656.70 |
| 1975–1979 | 143,440 | 2.4 | ... | 964.30 | 96,840 | 3.0 | ... | 1,013.10 | 46,600 | 1.8 | ... | 862.70 |
| 1970–1974 | 67,390 | 1.1 | ... | 838.00 | 46,990 | 1.5 | ... | 861.90 | 20,400 | 0.8 | ... | 782.80 |
| 1965–1969 | 15,370 | 0.3 | ... | 702.00 | 11,500 | 0.4 | ... | 708.80 | 3,870 | 0.1 | ... | 682.10 |
| Before 1965 | 380 | ^b | ... | 672.70 | 320 | ^b | ... | 678.90 | 60 | ^b | ... | 640.10 |
| 2003 | 292,640 | 5.0 | 5.0 | 1,012.70 | 169,070 | 5.2 | 5.2 | 1,145.20 | 123,570 | 4.7 | 4.7 | 831.50 |
| 2002 | 510,060 | 8.7 | 13.7 | 965.60 | 279,190 | 8.7 | 13.9 | 1,097.80 | 230,870 | 8.7 | 13.4 | 805.80 |
| 2001 | 566,330 | 9.7 | 23.3 | 927.60 | 301,860 | 9.4 | 23.3 | 1,050.80 | 264,470 | 10.0 | 23.4 | 786.90 |
| 2000 | 522,610 | 8.9 | 32.2 | 906.00 | 271,130 | 8.4 | 31.7 | 1,031.30 | 251,480 | 9.5 | 32.9 | 771.00 |
| 1999 | 456,570 | 7.8 | 40.0 | 873.30 | 233,590 | 7.2 | 38.9 | 995.40 | 222,980 | 8.4 | 41.4 | 745.40 |
| 1998 | 393,020 | 6.7 | 46.7 | 846.50 | 201,470 | 6.2 | 45.1 | 964.10 | 191,550 | 7.3 | 48.6 | 722.70 |
| 1997 | 350,060 | 6.0 | 52.7 | 833.40 | 180,440 | 5.6 | 50.7 | 946.80 | 169,620 | 6.4 | 55.1 | 712.90 |
| 1996 | 326,070 | 5.6 | 58.2 | 828.00 | 170,670 | 5.3 | 56.0 | 944.50 | 155,400 | 5.9 | 60.9 | 700.20 |
| 1995 | 299,470 | 5.1 | 63.3 | 831.20 | 155,780 | 4.8 | 60.9 | 942.50 | 143,690 | 5.4 | 66.4 | 710.50 |
| 1994 | 282,420 | 4.8 | 68.2 | 825.50 | 147,850 | 4.6 | 65.4 | 938.00 | 134,570 | 5.1 | 71.5 | 701.90 |
| 1993 | 256,930 | 4.4 | 72.5 | 801.80 | 137,970 | 4.3 | 69.7 | 907.30 | 118,960 | 4.5 | 76.0 | 679.40 |
| 1992 | 246,610 | 4.2 | 76.7 | 788.40 | 136,100 | 4.2 | 73.9 | 879.90 | 110,510 | 4.2 | 80.2 | 675.70 |
| 1991 | 226,600 | 3.9 | 80.6 | 784.00 | 127,900 | 4.0 | 77.9 | 869.50 | 98,700 | 3.7 | 83.9 | 673.20 |
| 1990 | 183,140 | 3.1 | 83.7 | 793.20 | 105,480 | 3.3 | 81.2 | 876.00 | 77,660 | 2.9 | 86.8 | 680.70 |
| 1989 | 135,530 | 2.3 | 86.0 | 793.80 | 78,950 | 2.4 | 83.6 | 873.90 | 56,580 | 2.1 | 89.0 | 682.20 |
| 1988 | 108,220 | 1.8 | 87.9 | 797.90 | 64,000 | 2.0 | 85.6 | 879.80 | 44,220 | 1.7 | 90.7 | 679.30 |
| 1987 | 91,660 | 1.6 | 89.4 | 790.90 | 55,290 | 1.7 | 87.3 | 866.70 | 36,370 | 1.4 | 92.0 | 675.70 |
| 1986 | 84,100 | 1.4 | 90.9 | 768.50 | 51,820 | 1.6 | 88.9 | 838.10 | 32,280 | 1.2 | 93.3 | 656.70 |
| 1985 | 75,340 | 1.3 | 92.2 | 747.60 | 47,210 | 1.5 | 90.4 | 808.40 | 28,130 | 1.1 | 94.3 | 645.70 |
| 1984 | 65,540 | 1.1 | 93.3 | 732.30 | 42,240 | 1.3 | 91.7 | 784.20 | 23,300 | 0.9 | 95.2 | 638.00 |
| 1983 | 52,800 | 0.9 | 94.2 | 739.80 | 35,090 | 1.1 | 92.8 | 787.70 | 17,710 | 0.7 | 95.9 | 644.90 |
| 1982 | 43,410 | 0.7 | 94.9 | 739.70 | 29,070 | 0.9 | 93.7 | 787.50 | 14,340 | 0.5 | 96.4 | 642.90 |
| 1981 | 35,830 | 0.6 | 95.5 | 771.10 | 23,920 | 0.7 | 94.4 | 822.60 | 11,910 | 0.5 | 96.9 | 667.60 |
| 1980 | 35,920 | 0.6 | 96.1 | 821.10 | 24,110 | 0.7 | 95.2 | 872.30 | 11,810 | 0.4 | 97.3 | 716.70 |
| 1979 | 32,770 | 0.6 | 96.7 | 944.10 | 22,060 | 0.7 | 95.9 | 998.70 | 10,710 | 0.4 | 97.7 | 831.60 |
| 1978 | 29,440 | 0.5 | 97.2 | 1,022.80 | 19,690 | 0.6 | 96.5 | 1,070.70 | 9,750 | 0.4 | 98.1 | 926.10 |
| 1977 | 27,940 | 0.5 | 97.7 | 998.30 | 18,570 | 0.6 | 97.0 | 1,052.80 | 9,370 | 0.4 | 98.4 | 890.50 |
| 1976 | 28,320 | 0.5 | 98.2 | 949.60 | 19,370 | 0.6 | 97.6 | 1,000.80 | 8,950 | 0.3 | 98.8 | 838.90 |
| 1975 | 24,970 | 0.4 | 98.6 | 900.10 | 17,150 | 0.5 | 98.2 | 936.60 | 7,820 | 0.3 | 99.1 | 820.10 |
| 1974 | 20,780 | 0.4 | 98.9 | 877.00 | 14,460 | 0.4 | 98.6 | 907.60 | 6,320 | 0.2 | 99.3 | 807.10 |
| 1973 | 17,000 | 0.3 | 99.2 | 840.10 | 11,540 | 0.4 | 99.0 | 866.90 | 5,460 | 0.2 | 99.5 | 783.50 |
| 1972 | 11,770 | 0.2 | 99.4 | 831.70 | 8,310 | 0.3 | 99.2 | 859.90 | 3,460 | 0.1 | 99.7 | 763.90 |
| 1971 | 10,190 | 0.2 | 99.6 | 819.20 | 7,230 | 0.2 | 99.5 | 833.70 | 2,960 | 0.1 | 99.8 | 783.60 |
| 1970 | 7,650 | 0.1 | 99.7 | 761.90 | 5,450 | 0.2 | 99.6 | 770.40 | 2,200 | 0.1 | 99.9 | 740.60 |
| 1969 | 5,880 | 0.1 | 99.8 | 721.50 | 4,370 | 0.1 | 99.8 | 724.70 | 1,510 | 0.1 | 99.9 | 712.30 |
| 1968 | 7,270 | 0.1 | 100.0 | 676.70 | 5,410 | 0.2 | 99.9 | 683.40 | 1,860 | 0.1 | 100.0 | 657.20 |
| 1967 | 1,220 | ^b | 100.0 | 744.00 | 990 | ^b | 100.0 | 757.60 | 230 | ^b | 100.0 | 685.30 |
| 1966 | 680 | ^b | 100.0 | 742.80 | 530 | ^b | 100.0 | 762.10 | 150 | ^b | 100.0 | 674.80 |
| 1965 | 320 | ^b | 100.0 | 673.20 | 200 | ^b | 100.0 | 663.40 | 120 | ^b | 100.0 | 689.50 |

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.

a. Represents those entitled in specified year or later.

b. Less than 0.05 percent.

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 2003

| Monthly benefit (dollars) | Total | | Men | | Women | |
|---------------------------|-----------|---------|-----------|---------|-----------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| All disabled workers | 5,867,460 | 100.0 | 3,225,850 | 100.0 | 2,641,610 | 100.0 |
| Less than 300.00 | 219,960 | 3.7 | 74,330 | 2.3 | 145,630 | 5.5 |
| 300.00–349.90 | 110,700 | 1.9 | 38,860 | 1.2 | 71,840 | 2.7 |
| 350.00–399.90 | 117,960 | 2.0 | 41,790 | 1.3 | 76,170 | 2.9 |
| 400.00–449.90 | 133,560 | 2.3 | 48,990 | 1.5 | 84,570 | 3.2 |
| 450.00–499.90 | 232,520 | 4.0 | 84,750 | 2.6 | 147,770 | 5.6 |
| 500.00–549.90 | 331,610 | 5.7 | 124,170 | 3.9 | 207,440 | 7.9 |
| 550.00–599.90 | 383,880 | 6.5 | 152,490 | 4.7 | 231,390 | 8.8 |
| 600.00–649.90 | 380,450 | 6.5 | 161,300 | 5.0 | 219,150 | 8.3 |
| 650.00–699.90 | 364,440 | 6.2 | 164,130 | 5.1 | 200,310 | 7.6 |
| 700.00–749.90 | 342,310 | 5.8 | 165,290 | 5.1 | 177,020 | 6.7 |
| 750.00–799.90 | 318,220 | 5.4 | 159,770 | 5.0 | 158,450 | 6.0 |
| 800.00–849.90 | 296,760 | 5.1 | 158,430 | 4.9 | 138,330 | 5.2 |
| 850.00–899.90 | 272,210 | 4.6 | 151,130 | 4.7 | 121,080 | 4.6 |
| 900.00–949.90 | 251,510 | 4.3 | 147,820 | 4.6 | 103,690 | 3.9 |
| 950.00–999.90 | 229,800 | 3.9 | 140,230 | 4.3 | 89,570 | 3.4 |
| 1,000.00–1,049.90 | 208,990 | 3.6 | 131,910 | 4.1 | 77,080 | 2.9 |
| 1,050.00–1,099.90 | 191,140 | 3.3 | 127,100 | 3.9 | 64,040 | 2.4 |
| 1,100.00–1,149.90 | 170,600 | 2.9 | 116,450 | 3.6 | 54,150 | 2.1 |
| 1,150.00–1,199.90 | 154,670 | 2.6 | 109,210 | 3.4 | 45,460 | 1.7 |
| 1,200.00–1,249.90 | 142,030 | 2.4 | 104,050 | 3.2 | 37,980 | 1.4 |
| 1,250.00–1,299.90 | 136,580 | 2.3 | 103,180 | 3.2 | 33,400 | 1.3 |
| 1,300.00–1,349.90 | 152,230 | 2.6 | 118,050 | 3.7 | 34,180 | 1.3 |
| 1,350.00–1,399.90 | 141,090 | 2.4 | 111,970 | 3.5 | 29,120 | 1.1 |
| 1,400.00–1,449.90 | 121,860 | 2.1 | 98,890 | 3.1 | 22,970 | 0.9 |
| 1,450.00–1,499.90 | 109,130 | 1.9 | 89,520 | 2.8 | 19,610 | 0.7 |
| 1,500.00 or more | 353,250 | 6.0 | 302,040 | 9.4 | 51,210 | 1.9 |
| Average benefit (dollars) | 861.70 | | 965.90 | | 734.40 | |

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.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D3—Number and total monthly benefits, by sex, December 1957–2003, selected years

| Year | All disabled workers | | Men | | Women | |
|------|----------------------|--|-----------|--|-----------|--|
| | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) |
| 1957 | 149,850 | 10,904 | 121,172 | 8,903 | 28,678 | 2,001 |
| 1958 | 237,719 | 19,516 | 189,883 | 16,138 | 47,836 | 3,378 |
| 1959 | 334,443 | 29,765 | 264,201 | 24,417 | 70,242 | 5,348 |
| 1960 | 455,371 | 40,668 | 356,277 | 33,034 | 99,094 | 7,633 |
| 1965 | 988,074 | 96,599 | 734,047 | 74,946 | 254,027 | 21,656 |
| 1970 | 1,492,948 | 196,010 | 1,068,986 | 148,194 | 423,962 | 47,819 |
| 1975 | 2,488,774 | 562,180 | 1,710,923 | 418,013 | 777,851 | 144,167 |
| 1980 | 2,858,680 | 1,059,792 | 1,928,030 | 784,266 | 930,650 | 275,525 |
| 1985 | 2,656,638 | 1,285,375 | 1,784,750 | 953,156 | 871,888 | 332,219 |
| 1986 | 2,728,463 | 1,331,144 | 1,826,835 | 985,003 | 901,628 | 346,141 |
| 1987 | 2,785,859 | 1,415,811 | 1,857,172 | 1,044,647 | 928,687 | 371,165 |
| 1988 | 2,830,284 | 1,498,637 | 1,876,878 | 1,101,675 | 953,406 | 396,962 |
| 1989 | 2,895,364 | 1,609,780 | 1,906,379 | 1,176,403 | 988,985 | 433,376 |
| 1990 | 3,011,294 | 1,768,313 | 1,967,408 | 1,283,579 | 1,043,886 | 484,735 |
| 1991 | 3,194,938 | 1,946,823 | 2,067,777 | 1,401,006 | 1,127,161 | 545,817 |
| 1992 | 3,467,783 | 2,171,080 | 2,219,789 | 1,546,924 | 1,247,994 | 624,156 |
| 1993 | 3,725,966 | 2,390,829 | 2,357,332 | 1,685,025 | 1,368,634 | 705,804 |
| 1994 | 3,962,954 | 2,620,982 | 2,473,061 | 1,824,195 | 1,489,893 | 796,787 |
| 1995 | 4,185,263 | 2,853,365 | 2,568,359 | 1,956,168 | 1,616,904 | 897,197 |
| 1996 | 4,385,623 | 3,087,223 | 2,644,454 | 2,083,123 | 1,741,169 | 1,004,100 |
| 1997 | 4,508,134 | 3,252,919 | 2,666,486 | 2,158,017 | 1,841,648 | 1,094,902 |
| 1998 | 4,698,319 | 3,444,259 | 2,737,296 | 2,252,129 | 1,961,023 | 1,192,130 |
| 1999 | 4,879,455 | 3,679,691 | 2,801,163 | 2,371,141 | 2,078,292 | 1,308,550 |
| 2000 | 5,042,334 | 3,965,304 | 2,856,411 | 2,521,252 | 2,185,923 | 1,444,052 |
| 2001 | 5,274,183 | 4,295,600 | 2,951,833 | 2,697,162 | 2,322,350 | 1,598,438 |
| 2002 | 5,543,981 | 4,625,445 | 3,070,001 | 2,872,308 | 2,473,980 | 1,753,137 |
| 2003 | 5,873,673 | 5,060,493 | 3,224,624 | 3,114,704 | 2,649,049 | 1,945,789 |

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 sex and age, December 1957–2003, selected years

| Year | Number (thousands) | Average age | Percentage distribution | | | | | | | |
|------------|-----------------------|----------------|-------------------------|----------|-------|-------|-------|-------|-------|-------|
| | | | Total, all ages | Under 30 | 30–39 | 40–44 | 45–49 | 50–54 | 55–59 | 60–64 |
| <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 |
| 2002 | 3,069 | 51.0 | 100.0 | 3.1 | 10.5 | 10.7 | 14.0 | 17.2 | 21.1 | 23.3 |
| 2003 | 3,226 | 51.3 | 100.0 | 3.2 | 9.9 | 10.4 | 13.8 | 17.1 | 21.4 | 24.2 |

(Continued)

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D4—Number, average age, and percentage distribution, by sex and age, December 1957–2003, selected years—Continued

| Year | Number (thousands) | Average age | Percentage distribution | | | | | | | |
|--------------|-----------------------|----------------|-------------------------|----------|-------|-------|-------|-------|-------|-------|
| | | | Total, all ages | Under 30 | 30–39 | 40–44 | 45–49 | 50–54 | 55–59 | 60–64 |
| <i>Women</i> | | | | | | | | | | |
| 1957 | 29 | 57.9 | 100.0 | ... | ... | ... | ... | 25.6 | 39.2 | 35.2 |
| 1958 | 48 | 58.2 | 100.0 | ... | ... | ... | ... | 23.8 | 37.5 | 38.6 |
| 1959 | 70 | 58.4 | 100.0 | ... | ... | ... | ... | 23.4 | 36.8 | 39.7 |
| 1960 | 99 | 56.7 | 100.0 | 0.3 | 3.2 | 3.2 | 5.3 | 19.4 | 31.4 | 37.2 |
| 1965 | 254 | 55.2 | 100.0 | 0.6 | 5.4 | 6.3 | 9.8 | 16.2 | 27.3 | 34.3 |
| 1970 | 424 | 55.0 | 100.0 | 1.9 | 5.1 | 5.6 | 10.1 | 15.9 | 26.0 | 35.3 |
| 1975 | 778 | 54.4 | 100.0 | 3.3 | 6.1 | 5.3 | 9.0 | 16.3 | 25.5 | 34.5 |
| 1980 | 931 | 53.7 | 100.0 | 3.4 | 8.2 | 5.3 | 8.2 | 14.4 | 25.4 | 35.0 |
| 1982 | 858 | 53.9 | 100.0 | 3.3 | 8.5 | 5.1 | 7.2 | 13.7 | 25.2 | 37.0 |
| 1983 | 838 | 53.6 | 100.0 | 3.5 | 9.3 | 5.7 | 7.5 | 12.9 | 24.3 | 36.8 |
| 1984 | 849 | 53.2 | 100.0 | 3.7 | 10.2 | 6.3 | 7.8 | 12.8 | 23.2 | 36.0 |
| 1985 | 872 | 52.6 | 100.0 | 3.8 | 11.2 | 6.9 | 8.3 | 12.9 | 22.3 | 34.6 |
| 1986 | 902 | 52.0 | 100.0 | 4.1 | 12.1 | 7.6 | 8.8 | 12.9 | 21.6 | 32.9 |
| 1987 | 929 | 51.7 | 100.0 | 4.2 | 12.7 | 8.2 | 9.4 | 12.9 | 20.9 | 31.7 |
| 1988 | 952 | 51.4 | 100.0 | 4.0 | 13.1 | 8.7 | 9.9 | 13.2 | 20.6 | 30.5 |
| 1989 | 989 | 51.1 | 100.0 | 4.0 | 13.5 | 9.2 | 10.6 | 13.4 | 20.1 | 29.2 |
| 1990 | 1,046 | 50.8 | 100.0 | 3.9 | 14.0 | 9.8 | 11.1 | 13.4 | 19.9 | 27.9 |
| 1991 | 1,133 | 50.5 | 100.0 | 4.0 | 14.3 | 10.3 | 11.6 | 13.8 | 19.4 | 26.5 |
| 1992 | 1,252 | 50.1 | 100.0 | 4.3 | 14.6 | 10.7 | 12.2 | 14.3 | 18.8 | 25.0 |
| 1993 | 1,371 | 49.9 | 100.0 | 4.3 | 14.9 | 11.0 | 12.6 | 14.8 | 18.9 | 23.5 |
| 1994 | 1,491 | 49.9 | 100.0 | 4.1 | 14.8 | 11.2 | 13.1 | 15.3 | 18.7 | 22.8 |
| 1995 | 1,614 | 49.9 | 100.0 | 3.8 | 14.5 | 11.5 | 13.6 | 15.7 | 18.8 | 22.2 |
| 1996 | 1,736 | 50.0 | 100.0 | 3.4 | 14.1 | 11.6 | 13.9 | 16.2 | 19.0 | 21.7 |
| 1997 | 1,835 | 50.2 | 100.0 | 3.1 | 13.3 | 11.6 | 14.0 | 16.8 | 19.6 | 21.5 |
| 1998 | 1,956 | 50.5 | 100.0 | 3.0 | 12.8 | 11.5 | 14.2 | 17.0 | 20.0 | 21.6 |
| 1999 | 2,071 | 50.5 | 100.0 | 2.8 | 12.1 | 11.5 | 14.3 | 17.5 | 20.4 | 21.5 |
| 2000 | 2,179 | 50.7 | 100.0 | 2.7 | 11.5 | 11.3 | 14.5 | 17.9 | 20.7 | 21.5 |
| 2001 | 2,313 | 50.8 | 100.0 | 2.7 | 11.1 | 11.1 | 14.4 | 18.0 | 21.1 | 21.6 |
| 2002 | 2,467 | 50.9 | 100.0 | 2.7 | 10.6 | 10.8 | 14.4 | 17.8 | 21.5 | 22.1 |
| 2003 | 2,642 | 51.2 | 100.0 | 3.0 | 10.1 | 10.4 | 14.2 | 17.7 | 21.5 | 23.1 |

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1988 and 1990–2003 are based on a 10 percent sample. All other years are 100 percent data.

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

... = not applicable.

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 primary insurance amount and type of benefit, December 2003

| Primary insurance amount (dollars) | Disabled workers | | Spouses | | Children | |
|--|------------------|---------|----------|---------|-----------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| Total | 5,867,460 | 100.0 | 151,500 | 100.0 | 1,579,310 | 100.0 |
| Less than 300.00 | 207,650 | 3.5 | 70 | 0.1 | 530 | a |
| 300.00–349.90 | 113,580 | 1.9 | 140 | 0.1 | 1,470 | 0.1 |
| 350.00–399.90 | 114,000 | 1.9 | 90 | 0.1 | 830 | 0.1 |
| 400.00–449.90 | 129,500 | 2.2 | 150 | 0.1 | 1,410 | 0.1 |
| 450.00–499.90 | 230,780 | 3.9 | 970 | 0.6 | 17,400 | 1.1 |
| 500.00–549.90 | 332,330 | 5.7 | 3,900 | 2.6 | 72,530 | 4.6 |
| 550.00–599.90 | 383,410 | 6.5 | 5,660 | 3.7 | 117,090 | 7.4 |
| 600.00–649.90 | 378,370 | 6.5 | 7,330 | 4.8 | 130,540 | 8.3 |
| 650.00–699.90 | 360,600 | 6.2 | 7,920 | 5.2 | 127,980 | 8.1 |
| 700.00–749.90 | 337,710 | 5.8 | 7,980 | 5.3 | 119,660 | 7.6 |
| 750.00–799.90 | 316,700 | 5.4 | 7,860 | 5.2 | 108,730 | 6.9 |
| 800.00–849.90 | 296,290 | 5.1 | 8,330 | 5.5 | 104,040 | 6.6 |
| 850.00–899.90 | 270,190 | 4.6 | 7,240 | 4.8 | 92,520 | 5.9 |
| 900.00–949.90 | 251,180 | 4.3 | 7,000 | 4.6 | 85,490 | 5.4 |
| 950.00–999.90 | 230,820 | 3.9 | 7,000 | 4.6 | 75,370 | 4.8 |
| 1,000.00–1,049.90 | 210,440 | 3.6 | 6,190 | 4.1 | 65,390 | 4.1 |
| 1,050.00–1,099.90 | 192,040 | 3.3 | 6,260 | 4.1 | 61,280 | 3.9 |
| 1,100.00–1,149.90 | 172,680 | 2.9 | 5,500 | 3.6 | 50,260 | 3.2 |
| 1,150.00–1,199.90 | 157,320 | 2.7 | 5,240 | 3.5 | 45,380 | 2.9 |
| 1,200.00–1,249.90 | 144,230 | 2.5 | 5,550 | 3.7 | 38,860 | 2.5 |
| 1,250.00–1,299.90 | 138,420 | 2.4 | 5,880 | 3.9 | 36,350 | 2.3 |
| 1,300.00–1,349.90 | 155,470 | 2.7 | 6,500 | 4.3 | 37,840 | 2.4 |
| 1,350.00–1,399.90 | 144,170 | 2.5 | 6,760 | 4.5 | 37,120 | 2.4 |
| 1,400.00–1,449.90 | 123,900 | 2.1 | 5,930 | 3.9 | 29,100 | 1.8 |
| 1,450.00–1,499.90 | 112,180 | 1.9 | 5,830 | 3.9 | 27,550 | 1.7 |
| 1,500.00 or more | 363,500 | 6.2 | 20,220 | 13.4 | 94,590 | 6.0 |
| Average primary insurance amount (dollars) | 867.20 | | 1,068.30 | | 917.30 | |

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

a. Less than 0.05 percent.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

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

Table 5.E2—Average monthly benefit, by type of benefit, sex, and age, December 1957–2003, selected years (in dollars)

| Year | Disabled workers | | | Spouses | | Children | | | |
|------|------------------|--------|--------|---------|----------|----------|--------------|-------------------------|----------|
| | All | Men | Women | Wives | Husbands | All | Under age 18 | Disabled adult children | Students |
| 1957 | 72.80 | 73.50 | 69.80 | ... | ... | ... | ... | ... | ... |
| 1958 | 82.10 | 85.00 | 70.60 | 34.00 | 33.90 | 27.30 | 27.30 | 38.50 | ... |
| 1959 | 89.00 | 92.40 | 76.10 | 36.10 | 34.70 | 31.00 | 30.80 | 39.40 | ... |
| 1960 | 89.30 | 92.70 | 77.00 | 34.40 | 34.70 | 30.20 | 30.00 | 39.00 | ... |
| 1965 | 97.80 | 102.10 | 85.30 | 35.00 | 32.60 | 31.60 | 30.90 | 41.60 | 49.30 |
| 1970 | 131.30 | 138.60 | 112.80 | 42.60 | 42.40 | 38.60 | 36.90 | 53.30 | 54.10 |
| 1975 | 225.90 | 244.30 | 185.30 | 67.40 | 61.70 | 62.00 | 58.60 | 84.10 | 86.90 |
| 1980 | 370.70 | 406.80 | 296.10 | 110.60 | 91.80 | 110.30 | 104.60 | 136.00 | 152.40 |
| 1985 | 483.80 | 534.10 | 381.00 | 132.70 | 102.70 | 141.80 | 138.90 | 183.80 | 196.90 |
| 1990 | 587.20 | 652.40 | 464.40 | 151.30 | 96.90 | 163.80 | 158.80 | 231.40 | 250.00 |
| 1991 | 609.40 | 677.50 | 484.20 | 154.60 | 101.70 | 167.90 | 162.70 | 240.90 | 253.20 |
| 1992 | 626.10 | 696.90 | 500.10 | 156.40 | 106.00 | 170.20 | 165.10 | 246.80 | 262.00 |
| 1993 | 641.70 | 714.80 | 515.70 | 157.50 | 108.60 | 173.10 | 167.70 | 253.30 | 265.90 |
| 1994 | 661.40 | 731.60 | 534.80 | 161.00 | 112.60 | 177.70 | 172.20 | 261.50 | 273.80 |
| 1995 | 681.80 | 761.60 | 554.90 | 165.00 | 116.60 | 183.50 | 177.90 | 270.10 | 284.10 |
| 1996 | 703.90 | 787.70 | 576.70 | 172.60 | 124.50 | 193.50 | 187.70 | 281.70 | 295.00 |
| 1997 | 721.60 | 809.30 | 594.50 | 178.00 | 129.10 | 201.20 | 195.20 | 292.20 | 306.30 |
| 1998 | 733.10 | 822.80 | 607.90 | 183.00 | 136.50 | 207.50 | 201.40 | 300.20 | 313.10 |
| 1999 | 754.10 | 846.50 | 629.60 | 190.20 | 145.40 | 216.10 | 209.50 | 310.70 | 319.80 |
| 2000 | 786.40 | 882.70 | 660.60 | 199.50 | 155.90 | 227.60 | 220.80 | 325.60 | 336.00 |
| 2001 | 814.50 | 913.70 | 688.30 | 208.20 | 164.50 | 237.90 | 230.70 | 339.90 | 343.50 |
| 2002 | 834.30 | 935.60 | 708.60 | 213.70 | 168.50 | 245.00 | 237.40 | 349.10 | 350.10 |
| 2003 | 861.60 | 965.90 | 734.50 | 222.70 | 176.90 | 253.90 | 245.90 | 360.90 | 359.10 |

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 1950–2003, selected years

| Year | Total | | Wives entitled solely because of age ^a | | Wives entitled because of children ^b | | | | | | Husbands | |
|--|-----------|---|---|---|---|---|---|---|---|---|----------|---|
| | | | | | Subtotal | | With at least 1 child under age 16 ^c | | With at least 1 disabled child ^d | | | |
| | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) |
| <i>Wives and husbands of retired workers</i> | | | | | | | | | | | | |
| 1950 | 508,350 | 11,995 | 498,688 | 11,865 | 8,865 | 114 | 8,865 | 114 | ... | ... | 797 | 16 |
| 1955 | 1,191,963 | 39,416 | 1,124,616 | 37,826 | 57,284 | 1,315 | 57,284 | 1,315 | ... | ... | 10,063 | 274 |
| 1960 | 2,269,384 | 87,867 | 2,143,949 | 84,018 | 110,909 | 3,344 | 101,774 | 3,010 | 9,135 | 334 | 14,526 | 504 |
| 1965 | 2,613,550 | 114,035 | 2,433,602 | 108,069 | 168,951 | 5,508 | 154,829 | 4,947 | 14,122 | 561 | 10,997 | 458 |
| 1970 | 2,668,105 | 163,263 | 2,491,724 | 155,510 | 167,968 | 7,261 | 154,919 | 6,542 | 13,049 | 719 | 8,413 | 492 |
| 1975 | 2,867,388 | 301,623 | 2,664,132 | 287,043 | 195,993 | 13,861 | 178,909 | 12,391 | 17,084 | 1,470 | 7,263 | 720 |
| 1980 | 3,015,549 | 518,500 | 2,789,472 | 490,818 | 186,894 | 22,508 | 167,793 | 19,708 | 19,101 | 2,800 | 39,183 | 5,174 |
| 1985 | 3,069,067 | 755,844 | 2,926,300 | 732,464 | 107,166 | 17,347 | 84,074 | 12,762 | 23,092 | 4,585 | 35,601 | 6,033 |
| 1986 | 3,086,091 | 776,870 | 2,948,854 | 754,026 | 102,549 | 16,933 | 79,471 | 12,304 | 23,078 | 4,629 | 34,688 | 5,911 |
| 1987 | 3,089,968 | 817,058 | 2,959,301 | 794,258 | 96,928 | 16,865 | 74,141 | 12,078 | 22,787 | 4,788 | 33,739 | 5,935 |
| 1988 | 3,086,022 | 854,644 | 2,959,856 | 831,659 | 93,577 | 17,071 | 71,585 | 12,266 | 21,992 | 4,805 | 32,589 | 5,914 |
| 1989 | 3,093,075 | 905,281 | 2,971,440 | 881,836 | 89,839 | 17,431 | 68,857 | 12,571 | 20,982 | 4,859 | 31,796 | 6,014 |
| 1990 | 3,101,085 | 964,983 | 2,982,034 | 940,514 | 87,925 | 18,300 | 67,785 | 13,322 | 20,140 | 4,977 | 31,126 | 6,169 |
| 1991 | 3,104,235 | 1,008,672 | 2,986,975 | 983,434 | 86,682 | 19,020 | 66,992 | 13,897 | 19,690 | 5,122 | 30,578 | 6,218 |
| 1992 | 3,111,515 | 1,047,553 | 2,995,629 | 1,021,616 | 85,680 | 19,648 | 66,618 | 14,468 | 19,062 | 5,180 | 30,206 | 6,289 |
| 1993 | 3,094,447 | 1,075,073 | 2,980,671 | 1,048,712 | 83,751 | 19,993 | 65,225 | 14,782 | 18,526 | 5,211 | 30,025 | 6,368 |
| 1994 | 3,066,430 | 1,101,203 | 2,954,950 | 1,074,452 | 81,644 | 20,296 | 63,575 | 15,033 | 18,069 | 5,263 | 29,836 | 6,455 |
| 1995 | 3,026,012 | 1,120,924 | 2,917,764 | 1,094,203 | 78,507 | 20,155 | 61,132 | 14,932 | 17,375 | 5,223 | 29,741 | 6,567 |
| 1996 | 2,970,226 | 1,139,092 | 2,872,316 | 1,113,470 | 68,310 | 18,942 | 52,384 | 13,874 | 15,926 | 5,068 | 29,600 | 6,680 |
| 1997 | 2,922,170 | 1,148,558 | 2,828,261 | 1,123,381 | 64,123 | 18,363 | 49,372 | 13,540 | 14,751 | 4,823 | 29,786 | 6,814 |
| 1998 | 2,864,230 | 1,145,353 | 2,773,583 | 1,120,553 | 60,634 | 17,883 | 46,649 | 13,205 | 13,985 | 4,678 | 30,013 | 6,917 |
| 1999 | 2,811,008 | 1,155,479 | 2,722,244 | 1,130,413 | 58,229 | 17,905 | 45,002 | 13,333 | 13,227 | 4,572 | 30,535 | 7,161 |
| 2000 | 2,798,203 | 1,200,835 | 2,707,444 | 1,173,771 | 58,416 | 19,212 | 45,680 | 14,547 | 12,736 | 4,665 | 32,343 | 7,851 |
| 2001 | 2,741,962 | 1,213,842 | 2,652,289 | 1,186,078 | 55,995 | 19,335 | 44,009 | 14,732 | 11,986 | 4,603 | 33,678 | 8,429 |
| 2002 | 2,681,153 | 1,210,108 | 2,591,336 | 1,181,531 | 54,683 | 19,579 | 43,212 | 15,022 | 11,471 | 4,557 | 35,143 | 8,998 |
| 2003 | 2,621,691 | 1,214,103 | 2,532,377 | 1,184,720 | 52,791 | 19,774 | 42,023 | 15,301 | 10,768 | 4,473 | 36,523 | 9,609 |

(Continued)

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

Table 5.F1—Number of wives and husbands and total monthly benefits, by type of benefit, December 1950–2003, selected years—Continued

| Year | Total | | Wives entitled solely because of age ^a | | Wives entitled because of children ^b | | | | | | Husbands | |
|---|---------|---|---|---|---|---|---|---|---|---|----------|---|
| | | | | | Subtotal | | With at least 1 child under age 16 ^c | | With at least 1 disabled child ^d | | | |
| | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) |
| Wives and husbands of disabled workers | | | | | | | | | | | | |
| 1958 | 12,231 | 415 | 4,845 | 192 | 7,370 | 223 | 7,345 | 222 | 25 | 1 | 16 | 1 |
| 1960 | 76,599 | 2,636 | 21,845 | 841 | 54,543 | 1,788 | 53,549 | 1,746 | 994 | 42 | 211 | 7 |
| 1965 | 193,362 | 6,761 | 29,352 | 1,109 | 163,500 | 5,635 | 160,922 | 5,512 | 2,578 | 123 | 510 | 17 |
| 1970 | 283,447 | 12,060 | 41,582 | 2,063 | 241,341 | 9,975 | 235,892 | 9,667 | 5,449 | 307 | 524 | 22 |
| 1975 | 452,922 | 30,536 | 64,883 | 5,263 | 387,474 | 25,239 | 380,763 | 24,633 | 6,711 | 606 | 565 | 35 |
| 1980 | 461,878 | 51,028 | 77,276 | 9,672 | 382,457 | 41,159 | 374,147 | 40,018 | 8,310 | 1,142 | 2,145 | 197 |
| 1985 | 305,532 | 40,507 | 79,294 | 12,693 | 224,704 | 27,656 | 215,012 | 26,055 | 9,692 | 1,602 | 1,534 | 158 |
| 1986 | 300,826 | 39,481 | 78,925 | 12,766 | 220,426 | 26,566 | 210,515 | 24,952 | 9,911 | 1,614 | 1,475 | 149 |
| 1987 | 290,888 | 39,195 | 73,484 | 12,808 | 211,222 | 25,854 | 201,280 | 24,194 | 9,942 | 1,661 | 6,182 | 532 |
| 1988 | 280,821 | 38,878 | 70,654 | 12,924 | 203,788 | 25,402 | 194,068 | 23,746 | 9,720 | 1,656 | 6,379 | 552 |
| 1989 | 271,488 | 39,148 | 67,154 | 12,974 | 197,946 | 25,590 | 188,562 | 23,916 | 9,384 | 1,674 | 6,388 | 584 |
| 1990 | 265,890 | 39,869 | 63,584 | 13,018 | 195,818 | 26,222 | 186,641 | 24,506 | 9,177 | 1,716 | 6,488 | 629 |
| 1991 | 266,219 | 40,792 | 60,866 | 13,020 | 198,457 | 27,071 | 189,401 | 25,321 | 9,056 | 1,750 | 6,896 | 701 |
| 1992 | 270,674 | 41,951 | 59,536 | 13,196 | 203,703 | 27,967 | 194,459 | 26,152 | 9,244 | 1,815 | 7,435 | 788 |
| 1993 | 272,759 | 42,570 | 58,052 | 13,241 | 206,975 | 28,490 | 197,589 | 26,616 | 9,386 | 1,874 | 7,732 | 839 |
| 1994 | 271,054 | 43,263 | 56,343 | 13,367 | 206,854 | 29,011 | 197,492 | 27,094 | 9,362 | 1,917 | 7,857 | 885 |
| 1995 | 263,539 | 43,105 | 53,882 | 13,300 | 201,827 | 28,892 | 192,573 | 26,962 | 9,254 | 1,929 | 7,830 | 913 |
| 1996 | 223,854 | 38,366 | 51,779 | 13,251 | 166,586 | 24,432 | 158,106 | 22,597 | 8,480 | 1,834 | 5,489 | 683 |
| 1997 | 206,959 | 36,585 | 51,265 | 13,251 | 150,647 | 22,683 | 142,717 | 20,928 | 7,930 | 1,755 | 5,047 | 651 |
| 1998 | 189,843 | 34,530 | 50,759 | 13,197 | 134,584 | 20,718 | 127,083 | 19,032 | 7,501 | 1,686 | 4,500 | 614 |
| 1999 | 176,299 | 33,336 | 50,165 | 13,314 | 121,906 | 19,407 | 114,842 | 17,781 | 7,064 | 1,626 | 4,228 | 615 |
| 2000 | 165,123 | 32,763 | 49,171 | 13,488 | 111,933 | 18,649 | 105,248 | 17,044 | 6,685 | 1,605 | 4,019 | 626 |
| 2001 | 156,899 | 32,491 | 48,597 | 13,794 | 104,271 | 18,034 | 97,942 | 16,460 | 6,329 | 1,574 | 4,031 | 663 |
| 2002 | 151,614 | 32,209 | 48,402 | 13,970 | 99,075 | 17,542 | 93,034 | 16,008 | 6,041 | 1,533 | 4,137 | 697 |
| 2003 | 150,886 | 33,401 | 51,536 | 15,304 | 95,042 | 17,335 | 89,168 | 15,808 | 5,874 | 1,527 | 4,308 | 762 |

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

NOTE: . . . = not applicable.

- a. Aged 62 or older. Includes wives aged 65 or older with children.
- b. Under age 65 with entitled children in their care.
- c. Prior to August 1981, benefits were payable to mothers and fathers caring for a child under age 18. For mothers and fathers caring for a child who was at least 14 and who were entitled in August 1981, benefits were continued until the child attained age 18 or September 1983, whichever came earlier.
- d. Excludes wives with both disabled and nondisabled children in their care.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

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

Table 5.F3—Percentage distribution of wives with entitlement based on age, by monthly benefit and age, December 2003

| Monthly benefit (dollars) | Total, 62 or older | 62–64 | 65–69 | 70–74 | 75–79 | 80–84 | 85 or older |
|---------------------------|-----------------------|---------|---------|---------|---------|---------|-------------|
| Total | | | | | | | |
| Number | 2,587,200 | 292,030 | 698,580 | 661,410 | 522,830 | 294,840 | 117,510 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Less than 150.00 | 5.6 | 10.6 | 6.3 | 4.7 | 4.2 | 3.9 | 3.3 |
| 150.00–174.90 | 1.5 | 1.9 | 1.5 | 1.3 | 1.2 | 1.3 | 1.8 |
| 175.00–199.90 | 1.9 | 2.8 | 2.0 | 1.9 | 1.7 | 1.7 | 1.3 |
| 200.00–224.90 | 2.1 | 3.0 | 2.2 | 2.0 | 1.9 | 1.8 | 1.8 |
| 225.00–249.90 | 2.3 | 3.0 | 2.4 | 2.2 | 2.2 | 2.2 | 2.1 |
| 250.00–274.90 | 2.4 | 2.8 | 2.5 | 2.3 | 2.2 | 2.2 | 2.3 |
| 275.00–299.90 | 2.6 | 3.0 | 2.7 | 2.5 | 2.4 | 2.5 | 2.4 |
| 300.00–324.90 | 2.7 | 2.9 | 2.8 | 2.6 | 2.7 | 2.6 | 2.6 |
| 325.00–349.90 | 3.0 | 3.0 | 3.0 | 3.0 | 2.9 | 3.2 | 2.8 |
| 350.00–374.90 | 3.4 | 3.5 | 3.3 | 3.3 | 3.3 | 3.3 | 3.9 |
| 375.00–399.90 | 3.7 | 3.6 | 3.4 | 3.5 | 3.8 | 3.9 | 5.1 |
| 400.00–424.90 | 4.3 | 3.8 | 3.7 | 4.2 | 4.7 | 5.0 | 5.3 |
| 425.00–449.90 | 5.4 | 4.1 | 4.2 | 4.9 | 6.7 | 8.2 | 5.6 |
| 450.00–474.90 | 6.7 | 4.2 | 4.7 | 6.2 | 10.0 | 10.0 | 5.5 |
| 475.00–499.90 | 7.8 | 5.6 | 5.9 | 9.1 | 10.6 | 7.5 | 5.7 |
| 500.00–524.90 | 8.9 | 6.8 | 9.0 | 11.5 | 8.6 | 6.9 | 5.8 |
| 525.00–549.90 | 7.0 | 7.1 | 8.9 | 8.4 | 4.6 | 4.7 | 5.0 |
| 550.00–574.90 | 5.1 | 6.8 | 7.0 | 4.2 | 3.6 | 4.2 | 4.4 |
| 575.00–599.90 | 4.0 | 6.4 | 4.3 | 3.0 | 3.2 | 3.9 | 4.6 |
| 600.00–624.90 | 3.4 | 5.4 | 3.1 | 2.8 | 2.9 | 3.9 | 4.1 |
| 625.00–649.90 | 3.0 | 4.1 | 2.6 | 2.4 | 2.9 | 3.7 | 4.2 |
| 650.00–674.90 | 2.7 | 2.1 | 2.6 | 2.5 | 3.0 | 3.4 | 3.5 |
| 675.00–699.90 | 2.3 | 1.1 | 2.3 | 2.2 | 2.6 | 2.6 | 3.4 |
| 700.00–724.90 | 1.9 | 0.7 | 2.0 | 2.0 | 2.4 | 1.6 | 2.1 |
| 725.00–749.90 | 1.5 | 0.5 | 1.8 | 1.8 | 1.7 | 1.0 | 1.6 |
| 750.00–774.90 | 1.2 | 0.4 | 1.5 | 1.6 | 1.1 | 0.8 | 1.2 |
| 775.00–799.90 | 1.0 | 0.2 | 1.4 | 1.3 | 0.7 | 0.7 | 1.1 |
| 800.00 or more | 2.6 | 0.2 | 3.0 | 2.3 | 2.0 | 3.4 | 7.4 |
| Average benefit (dollars) | 464.10 | 418.80 | 466.90 | 468.70 | 466.60 | 473.90 | 509.20 |

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

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

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

Table 5.F4—Number of children and total monthly benefits, by type of benefit, December 1940–2003, selected years

| Year | Number of children of— | | | | Total monthly benefits for children of— (thousands of dollars) | | | |
|--------------------------------|------------------------|-----------------|------------------|------------------|---|-----------------|------------------|------------------|
| | All workers | Retired workers | Deceased workers | Disabled workers | All workers | Retired workers | Deceased workers | Disabled workers |
| Total | | | | | | | | |
| 1957 | 1,502,077 | 179,697 | 1,322,380 | ... | 57,951 | 3,932 | 54,019 | ... |
| 1960 | 2,000,451 | 268,168 | 1,576,802 | 155,481 | 93,276 | 7,576 | 81,003 | 4,697 |
| 1965 | 3,092,659 | 460,781 | 2,074,263 | 557,615 | 159,428 | 14,736 | 127,067 | 17,627 |
| 1970 | 4,122,305 | 545,708 | 2,687,997 | 888,600 | 279,845 | 24,473 | 221,041 | 34,330 |
| 1980 | 4,606,517 | 638,711 | 2,609,920 | 1,357,886 | 864,242 | 89,386 | 625,090 | 149,766 |
| 1990 | 3,187,010 | 422,200 | 1,776,013 | 988,797 | 991,628 | 109,497 | 720,206 | 161,926 |
| 1995 | 3,734,097 | 441,600 | 1,883,643 | 1,408,854 | 1,283,288 | 141,974 | 882,837 | 258,477 |
| 2000 | 3,802,863 | 458,951 | 1,878,007 | 1,465,905 | 1,547,808 | 181,177 | 1,033,055 | 333,575 |
| 2001 | 3,839,381 | 467,064 | 1,890,156 | 1,482,161 | 1,624,285 | 192,727 | 1,078,886 | 352,672 |
| 2002 | 3,910,256 | 476,684 | 1,907,899 | 1,525,673 | 1,692,471 | 203,265 | 1,115,415 | 373,791 |
| 2003 | 3,960,909 | 480,033 | 1,909,983 | 1,570,893 | 1,763,910 | 213,230 | 1,151,907 | 398,773 |
| Children under age 18 | | | | | | | | |
| 1940 | 54,648 | 6,410 | 48,238 | ... | 668 | 62 | 606 | ... |
| 1950 | 699,703 | 46,241 | 653,462 | ... | 19,366 | 788 | 18,578 | ... |
| 1960 | 1,896,397 | 214,343 | 1,529,535 | 152,519 | 88,682 | 5,654 | 78,446 | 4,582 |
| 1965 | 2,688,592 | 339,507 | 1,816,888 | 532,197 | 135,432 | 9,598 | 109,392 | 16,442 |
| 1970 | 3,314,578 | 354,373 | 2,161,094 | 799,111 | 215,366 | 13,367 | 172,499 | 29,500 |
| 1980 | 3,423,081 | 354,797 | 1,883,438 | 1,184,846 | 607,574 | 40,548 | 443,097 | 123,930 |
| 1990 | 2,497,252 | 236,051 | 1,333,690 | 927,511 | 739,787 | 53,944 | 538,546 | 147,296 |
| 1995 | 2,956,482 | 241,756 | 1,386,111 | 1,328,615 | 943,028 | 69,312 | 637,326 | 236,390 |
| 2000 | 2,976,406 | 255,908 | 1,346,091 | 1,374,407 | 1,120,977 | 92,987 | 724,567 | 303,423 |
| 2001 | 2,993,852 | 262,509 | 1,345,986 | 1,385,357 | 1,172,169 | 100,320 | 752,216 | 319,633 |
| 2002 | 3,043,029 | 270,231 | 1,350,533 | 1,422,265 | 1,218,610 | 107,298 | 773,661 | 337,652 |
| 2003 | 3,080,308 | 273,646 | 1,345,029 | 1,461,633 | 1,268,682 | 113,784 | 795,476 | 359,422 |
| Disabled adult children | | | | | | | | |
| 1957 | 28,869 | 16,686 | 12,183 | ... | 1,115 | 526 | 589 | ... |
| 1960 | 104,054 | 53,825 | 47,267 | 2,962 | 4,594 | 1,922 | 2,557 | 115 |
| 1965 | 198,390 | 87,122 | 102,287 | 8,981 | 10,271 | 3,541 | 6,357 | 374 |
| 1970 | 270,557 | 101,341 | 154,921 | 14,295 | 19,807 | 5,755 | 13,290 | 761 |
| 1980 | 450,169 | 140,548 | 276,738 | 32,883 | 89,561 | 22,463 | 62,625 | 4,473 |
| 1990 | 600,480 | 173,941 | 389,385 | 37,154 | 217,201 | 51,879 | 156,725 | 8,597 |
| 1995 | 686,101 | 188,965 | 446,377 | 50,759 | 300,007 | 68,743 | 217,553 | 13,711 |
| 2000 | 728,689 | 191,584 | 480,351 | 56,754 | 377,647 | 83,098 | 276,072 | 18,478 |
| 2001 | 736,546 | 191,809 | 486,817 | 57,920 | 395,952 | 86,510 | 289,757 | 19,684 |
| 2002 | 744,529 | 192,085 | 492,985 | 59,459 | 409,813 | 89,114 | 299,946 | 20,754 |
| 2003 | 752,814 | 191,704 | 498,659 | 62,451 | 426,877 | 92,125 | 312,212 | 22,540 |
| Students | | | | | | | | |
| 1965 | 205,677 | 34,152 | 155,088 | 16,437 | 13,725 | 1,597 | 11,318 | 811 |
| 1970 | 537,170 | 89,994 | 371,982 | 75,194 | 44,672 | 5,351 | 35,252 | 4,069 |
| 1980 | 733,267 | 143,366 | 449,744 | 140,157 | 167,107 | 26,375 | 119,368 | 21,363 |
| 1990 | 89,278 | 12,208 | 52,938 | 24,132 | 34,641 | 3,673 | 24,935 | 6,033 |
| 1995 | 91,514 | 10,879 | 51,155 | 29,480 | 40,253 | 3,919 | 27,958 | 8,376 |
| 2000 | 97,768 | 11,459 | 51,565 | 34,744 | 49,184 | 5,092 | 32,417 | 11,674 |
| 2001 | 108,983 | 12,746 | 57,353 | 38,884 | 56,164 | 5,897 | 36,912 | 13,356 |
| 2002 | 122,698 | 14,368 | 64,381 | 43,949 | 64,048 | 6,854 | 41,808 | 15,386 |
| 2003 | 127,787 | 14,683 | 66,295 | 46,809 | 68,351 | 7,321 | 44,218 | 16,811 |

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. 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 1940–2003, 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 | ^a 165.70 | ^a 161.50 | ^a 163.60 | ^a 183.10 | 156.20 | 131.60 |
| 1978 | 190.40 | 241.40 | 186.10 | 214.00 | 182.20 | 178.30 | 176.20 | 200.80 | 165.70 | 129.70 |
| 1979 | 212.60 | 269.80 | 209.00 | 238.70 | 205.60 | 201.70 | 195.90 | 226.60 | 180.80 | 133.40 |
| 1980 | 246.20 | 311.50 | 239.40 | 276.00 | 239.50 | 235.30 | 226.40 | 265.40 | 205.40 | 145.70 |
| 1981 | 276.70 | 349.80 | 266.80 | 310.40 | 270.90 | 265.70 | 254.00 | 301.70 | 227.20 | 158.80 |
| 1982 | 302.80 | 379.30 | 285.60 | 335.40 | 285.40 | 291.50 | 279.90 | 260.70 | 242.80 | 165.50 |
| 1983 | 308.70 | 397.10 | 295.70 | 349.80 | 298.00 | 307.20 | 289.00 | 233.40 | 251.10 | 166.20 |
| 1984 | 321.50 | 416.10 | 306.80 | 363.90 | 314.30 | 320.70 | 302.60 | 257.20 | 307.70 | 190.70 |
| 1985 | 332.50 | 434.00 | 317.80 | 378.20 | 330.50 | 332.60 | 315.50 | 360.80 | 316.60 | 191.80 |
| 1986 | 338.30 | 444.90 | 324.80 | 386.30 | 336.80 | 338.70 | 323.10 | 375.70 | 321.30 | 195.50 |
| 1987 | 352.70 | 468.90 | 340.60 | 407.30 | 352.40 | 353.90 | 340.00 | 400.10 | 335.60 | 202.30 |
| 1988 | 367.90 | 493.40 | 359.50 | 428.40 | 367.60 | 368.00 | 357.40 | 424.70 | 350.00 | 211.30 |
| 1989 | 387.60 | 522.60 | 382.00 | 453.50 | 384.90 | 384.30 | 378.10 | 447.90 | 368.90 | 223.60 |
| 1990 | 409.10 | 557.40 | 408.40 | 482.20 | 405.50 | 403.80 | 402.50 | 471.00 | 391.30 | 238.40 |
| 1991 | 424.10 | 584.50 | 428.00 | 506.10 | 420.10 | 417.00 | 421.50 | 486.20 | 409.40 | 260.60 |
| 1992 | 437.70 | 608.70 | 443.60 | 526.40 | 432.30 | 427.60 | 438.30 | 504.10 | 425.30 | 273.30 |
| 1993 | 448.40 | 631.70 | 461.50 | 547.20 | 443.10 | 437.00 | 453.70 | 515.00 | 436.90 | 286.20 |
| 1994 | 464.40 | 656.60 | 481.40 | 569.50 | 456.20 | 448.70 | 470.80 | 532.20 | 449.20 | 299.90 |

(Continued)

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

Table 5.F6—Average monthly benefit for survivors, by type of benefit, December 1940–2003, selected years (in dollars)—Continued

| Year | Widowed mothers and fathers | Nondisabled | | Parents | Children | | | | Disabled | |
|------|-----------------------------|-------------|----------|---------|----------|--------------|-------------------------|----------|----------|----------|
| | | Widows | Widowers | | Total | Under age 18 | Disabled adult children | Students | Widows | Widowers |
| 1995 | 477.90 | 681.20 | 500.20 | 590.80 | 468.70 | 459.80 | 487.40 | 546.50 | 461.50 | 307.60 |
| 1996 | 514.90 | 708.30 | 520.70 | 613.50 | 487.20 | 478.20 | 506.10 | 560.80 | 474.30 | 318.00 |
| 1997 | 532.00 | 732.50 | 534.50 | 635.70 | 500.00 | 490.10 | 521.30 | 569.60 | 483.90 | 326.90 |
| 1998 | 545.10 | 750.30 | 549.10 | 651.10 | 509.60 | 498.90 | 532.80 | 579.90 | 491.00 | 332.90 |
| 1999 | 565.70 | 776.10 | 572.40 | 673.90 | 526.30 | 515.00 | 550.40 | 595.80 | 503.90 | 340.30 |
| 2000 | 595.00 | 811.80 | 606.90 | 703.90 | 550.10 | 538.30 | 574.70 | 628.70 | 523.80 | 361.70 |
| 2001 | 620.80 | 842.50 | 636.80 | 728.60 | 570.80 | 558.90 | 595.20 | 643.60 | 541.20 | 374.80 |
| 2002 | 640.20 | 862.80 | 662.80 | 752.70 | 584.60 | 572.90 | 608.40 | 649.40 | 553.00 | 384.70 |
| 2003 | 663.70 | 889.50 | 697.70 | 779.20 | 603.10 | 591.40 | 626.10 | 667.00 | 569.10 | 400.80 |

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

NOTE: . . . = not applicable.

a. Children's data estimated for 1977.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

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

Table 5.F7—Number and percentage distribution of survivors, by primary insurance amount and type of benefit, December 2003

| 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 | 188,320 | 100.0 | 4,499,900 | 100.0 | 2,190 | 100.0 | 207,630 | 100.0 | 1,906,680 | 100.0 |
| Less than 300.00 | 4,190 | 2.2 | 35,910 | 0.8 | 10 | 0.5 | 2,530 | 1.2 | 86,270 | 4.5 |
| 300.00–349.90 | 1,710 | 0.9 | 77,760 | 1.7 | 10 | 0.5 | 1,910 | 0.9 | 56,590 | 3.0 |
| 350.00–399.90 | 2,030 | 1.1 | 39,500 | 0.9 | 30 | 1.4 | 1,500 | 0.7 | 39,090 | 2.1 |
| 400.00–449.90 | 2,090 | 1.1 | 46,650 | 1.0 | 20 | 0.9 | 1,990 | 1.0 | 40,200 | 2.1 |
| 450.00–499.90 | 3,490 | 1.9 | 67,400 | 1.5 | 40 | 1.8 | 3,060 | 1.5 | 62,400 | 3.3 |
| 500.00–549.90 | 5,550 | 2.9 | 93,550 | 2.1 | 80 | 3.7 | 4,950 | 2.4 | 88,770 | 4.7 |
| 550.00–599.90 | 6,870 | 3.6 | 100,870 | 2.2 | 90 | 4.1 | 5,430 | 2.6 | 102,720 | 5.4 |
| 600.00–649.90 | 7,850 | 4.2 | 109,530 | 2.4 | 40 | 1.8 | 6,930 | 3.3 | 103,610 | 5.4 |
| 650.00–699.90 | 7,600 | 4.0 | 111,440 | 2.5 | 100 | 4.6 | 7,360 | 3.5 | 101,850 | 5.3 |
| 700.00–749.90 | 7,510 | 4.0 | 112,170 | 2.5 | 100 | 4.6 | 7,660 | 3.7 | 94,920 | 5.0 |
| 750.00–799.90 | 7,790 | 4.1 | 144,960 | 3.2 | 160 | 7.3 | 8,660 | 4.2 | 97,250 | 5.1 |
| 800.00–849.90 | 9,050 | 4.8 | 163,070 | 3.6 | 110 | 5.0 | 8,690 | 4.2 | 94,280 | 4.9 |
| 850.00–899.90 | 8,850 | 4.7 | 219,740 | 4.9 | 160 | 7.3 | 8,910 | 4.3 | 98,700 | 5.2 |
| 900.00–949.90 | 8,960 | 4.8 | 250,670 | 5.6 | 110 | 5.0 | 10,250 | 4.9 | 90,840 | 4.8 |
| 950.00–999.90 | 8,590 | 4.6 | 236,240 | 5.2 | 90 | 4.1 | 10,150 | 4.9 | 80,170 | 4.2 |
| 1,000.00–1,049.90 | 7,960 | 4.2 | 270,470 | 6.0 | 50 | 2.3 | 10,600 | 5.1 | 73,930 | 3.9 |
| 1,050.00–1,099.90 | 8,120 | 4.3 | 283,880 | 6.3 | 90 | 4.1 | 10,920 | 5.3 | 69,930 | 3.7 |
| 1,100.00–1,149.90 | 7,240 | 3.8 | 259,370 | 5.8 | 70 | 3.2 | 10,050 | 4.8 | 61,230 | 3.2 |
| 1,150.00–1,199.90 | 7,230 | 3.8 | 290,650 | 6.5 | 90 | 4.1 | 10,450 | 5.0 | 58,010 | 3.0 |
| 1,200.00–1,249.90 | 6,540 | 3.5 | 301,220 | 6.7 | 70 | 3.2 | 9,840 | 4.7 | 52,400 | 2.7 |
| 1,250.00–1,299.90 | 6,630 | 3.5 | 293,790 | 6.5 | 140 | 6.4 | 9,250 | 4.5 | 48,140 | 2.5 |
| 1,300.00–1,349.90 | 6,950 | 3.7 | 301,380 | 6.7 | 110 | 5.0 | 11,670 | 5.6 | 51,550 | 2.7 |
| 1,350.00–1,399.90 | 6,520 | 3.5 | 234,970 | 5.2 | 170 | 7.8 | 10,400 | 5.0 | 45,480 | 2.4 |
| 1,400.00–1,449.90 | 5,950 | 3.2 | 139,300 | 3.1 | 70 | 3.2 | 8,680 | 4.2 | 37,770 | 2.0 |
| 1,450.00–1,499.90 | 4,960 | 2.6 | 92,670 | 2.1 | 20 | 0.9 | 6,920 | 3.3 | 30,920 | 1.6 |
| 1,500.00 or more | 28,090 | 14.9 | 222,740 | 4.9 | 160 | 7.3 | 18,870 | 9.1 | 139,660 | 7.3 |

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

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

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

Table 5.F8—Number of widow(er)s and total monthly benefits, by type of benefit, December 1950–2003

| Year | Total | | Nondisabled— | | | | Disabled widow(er)s | |
|------|-----------|---|--------------|---|----------|---|---------------------|---|
| | Number | Total monthly benefits (thousands of dollars) | Widows | | Widowers | | Number | Total monthly benefits (thousands of dollars) |
| | | | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) | | |
| 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 |
| 2002 | 4,770,638 | 4,043,051 | 4,524,020 | 3,903,384 | 39,260 | 26,020 | 207,358 | 113,648 |
| 2003 | 4,707,215 | 4,110,963 | 4,456,446 | 3,964,035 | 41,410 | 28,892 | 209,359 | 118,035 |

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

NOTE: ... = not applicable.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. 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 2003

| Year | Number | Percentage distribution | Cumulative percentage ^a | Average monthly benefit (dollars) |
|-------------|-----------|-------------------------|------------------------------------|-----------------------------------|
| Total | 4,499,900 | 100.0 | ... | 888.30 |
| 2000–2003 | 1,081,040 | 24.0 | ... | 952.20 |
| 1995–1999 | 1,076,230 | 23.9 | ... | 931.40 |
| 1990–1994 | 861,880 | 19.2 | ... | 904.50 |
| 1985–1989 | 693,950 | 15.4 | ... | 852.10 |
| 1980–1984 | 459,040 | 10.2 | ... | 792.90 |
| 1975–1979 | 212,080 | 4.7 | ... | 722.10 |
| 1970–1974 | 88,830 | 2.0 | ... | 673.40 |
| 1965–1969 | 25,140 | 0.6 | ... | 660.70 |
| Before 1965 | 1,710 | ^b | ... | 637.50 |
| 2003 | 270,790 | 6.0 | 6.0 | 958.50 |
| 2002 | 281,560 | 6.3 | 12.3 | 954.70 |
| 2001 | 269,550 | 6.0 | 18.3 | 948.40 |
| 2000 | 259,140 | 5.8 | 24.0 | 946.90 |
| 1999 | 242,810 | 5.4 | 29.4 | 933.90 |
| 1998 | 224,020 | 5.0 | 34.4 | 939.10 |
| 1997 | 210,190 | 4.7 | 39.1 | 931.00 |
| 1996 | 203,130 | 4.5 | 43.6 | 928.30 |
| 1995 | 196,080 | 4.4 | 47.9 | 923.10 |
| 1994 | 187,180 | 4.2 | 52.1 | 921.00 |
| 1993 | 178,140 | 4.0 | 56.1 | 915.10 |
| 1992 | 170,690 | 3.8 | 59.9 | 909.10 |
| 1991 | 165,010 | 3.7 | 63.5 | 892.30 |
| 1990 | 160,860 | 3.6 | 67.1 | 881.30 |
| 1989 | 151,800 | 3.4 | 70.5 | 873.50 |
| 1988 | 145,770 | 3.2 | 73.7 | 862.20 |
| 1987 | 138,850 | 3.1 | 76.8 | 854.00 |
| 1986 | 133,800 | 3.0 | 79.8 | 836.50 |
| 1985 | 123,730 | 2.8 | 82.5 | 828.50 |
| 1984 | 114,230 | 2.5 | 85.1 | 813.70 |
| 1983 | 103,760 | 2.3 | 87.4 | 797.80 |
| 1982 | 90,400 | 2.0 | 89.4 | 795.30 |
| 1981 | 82,100 | 1.8 | 91.2 | 776.30 |
| 1980 | 68,550 | 1.5 | 92.7 | 767.60 |
| 1979 | 58,410 | 1.3 | 94.0 | 750.50 |
| 1978 | 48,950 | 1.1 | 95.1 | 734.40 |
| 1977 | 37,030 | 0.8 | 95.9 | 718.50 |
| 1976 | 36,720 | 0.8 | 96.7 | 691.80 |
| 1975 | 30,970 | 0.7 | 97.4 | 689.70 |
| 1974 | 25,610 | 0.6 | 98.0 | 684.80 |
| 1973 | 21,400 | 0.5 | 98.5 | 675.00 |
| 1972 | 17,130 | 0.4 | 98.9 | 665.40 |
| 1971 | 13,960 | 0.3 | 99.2 | 662.80 |
| 1970 | 10,730 | 0.2 | 99.4 | 669.20 |
| 1969 | 7,810 | 0.2 | 99.6 | 679.40 |
| 1968 | 6,520 | 0.1 | 99.7 | 653.90 |
| 1967 | 4,580 | 0.1 | 99.8 | 650.50 |
| 1966 | 3,030 | 0.1 | 99.9 | 649.00 |
| 1965 | 3,200 | 0.1 | 99.9 | 654.30 |

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

NOTE: ... = not applicable.

- a. Represents those entitled in specified year or later.
- b. Less than 0.05 percent.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

Table 5.F10—Number, percentage, and average monthly benefit, by year of entitlement as disabled widow(er), December 2003

| Year | Number | Percentage distribution | Cumulative percentage ^a | Average monthly benefit (dollars) |
|-----------|---------|-------------------------|------------------------------------|-----------------------------------|
| Total | 207,630 | 100.0 | ... | 562.30 |
| 2000–2003 | 83,090 | 40.0 | ... | 571.60 |
| 1996–1999 | 77,900 | 37.5 | ... | 553.40 |
| 1991–1995 | 43,080 | 20.7 | ... | 558.60 |
| 1989–1990 | 3,560 | 1.7 | ... | 583.00 |
| 2003 | 13,590 | 6.5 | 6.5 | 565.30 |
| 2002 | 23,010 | 11.1 | 17.6 | 576.90 |
| 2001 | 23,370 | 11.3 | 28.9 | 574.30 |
| 2000 | 23,120 | 11.1 | 40.0 | 567.10 |
| 1999 | 23,830 | 11.5 | 51.5 | 568.10 |
| 1998 | 20,780 | 10.0 | 61.5 | 552.10 |
| 1997 | 18,110 | 8.7 | 70.2 | 543.90 |
| 1996 | 15,180 | 7.3 | 77.5 | 543.60 |
| 1995 | 11,890 | 5.7 | 83.3 | 556.10 |
| 1994 | 10,760 | 5.2 | 88.4 | 559.30 |
| 1993 | 8,130 | 3.9 | 92.4 | 547.10 |
| 1992 | 6,450 | 3.1 | 95.5 | 562.70 |
| 1991 | 5,850 | 2.8 | 98.3 | 574.10 |
| 1990 | 2,160 | 1.0 | 99.3 | 598.70 |
| 1989 | 1,400 | 0.7 | 100.0 | 558.90 |

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

NOTE: ... = not applicable.

- a. Represents those entitled in specified year or later.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

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

Table 5.F11—Percentage distribution of nondisabled widows, by monthly benefit and age, December 2003

| 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 | 4,458,120 | 130,540 | 300,930 | 646,870 | 695,030 | 864,130 | 852,390 | 568,720 | 399,510 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Less than 300.00 | 2.8 | 3.1 | 3.9 | 2.8 | 3.2 | 3.2 | 2.8 | 2.3 | 0.8 |
| 300.00–349.90 | 1.8 | 1.0 | 1.1 | 1.2 | 1.3 | 1.6 | 1.8 | 2.2 | 4.3 |
| 350.00–399.90 | 1.9 | 1.7 | 1.6 | 1.8 | 1.8 | 1.9 | 2.0 | 1.9 | 1.8 |
| 400.00–449.90 | 2.3 | 2.4 | 2.2 | 2.1 | 2.1 | 2.3 | 2.2 | 2.3 | 2.6 |
| 450.00–499.90 | 2.6 | 2.5 | 2.7 | 2.5 | 2.6 | 2.6 | 2.5 | 2.7 | 3.2 |
| 500.00–549.90 | 3.0 | 3.0 | 3.1 | 2.7 | 2.8 | 2.9 | 3.1 | 3.1 | 3.7 |
| 550.00–599.90 | 3.4 | 3.5 | 3.2 | 3.1 | 3.1 | 3.3 | 3.4 | 3.7 | 3.9 |
| 600.00–649.90 | 4.1 | 4.0 | 3.8 | 3.6 | 3.8 | 4.0 | 4.4 | 4.6 | 4.6 |
| 650.00–699.90 | 4.7 | 3.9 | 4.3 | 4.3 | 4.2 | 4.7 | 4.9 | 5.5 | 5.7 |
| 700.00–749.90 | 5.3 | 4.4 | 4.7 | 4.7 | 4.9 | 5.2 | 5.6 | 5.9 | 6.8 |
| 750.00–799.90 | 5.9 | 5.3 | 5.5 | 5.5 | 5.5 | 5.9 | 5.9 | 5.7 | 7.6 |
| 800.00–849.90 | 6.2 | 5.6 | 5.8 | 6.0 | 6.2 | 6.3 | 6.0 | 5.8 | 7.7 |
| 850.00–899.90 | 6.9 | 6.1 | 6.4 | 6.5 | 7.1 | 7.7 | 6.7 | 6.1 | 7.6 |
| 900.00–949.90 | 7.4 | 7.1 | 6.8 | 7.8 | 8.5 | 7.9 | 6.9 | 6.1 | 7.3 |
| 950.00–999.90 | 7.4 | 7.7 | 7.8 | 9.2 | 8.3 | 7.2 | 7.2 | 5.7 | 5.8 |
| 1,000.00–1,049.90 | 6.5 | 6.8 | 7.5 | 7.8 | 6.2 | 6.5 | 6.3 | 5.5 | 5.6 |
| 1,050.00–1,099.90 | 5.6 | 5.9 | 7.4 | 6.1 | 5.9 | 5.8 | 4.9 | 4.8 | 4.5 |
| 1,100.00–1,149.90 | 4.7 | 7.0 | 6.3 | 5.1 | 5.2 | 4.6 | 4.1 | 4.1 | 3.1 |
| 1,150.00–1,199.90 | 3.6 | 6.5 | 5.1 | 4.1 | 3.9 | 3.5 | 3.4 | 3.1 | 2.1 |
| 1,200.00–1,249.90 | 3.0 | 5.2 | 3.8 | 3.0 | 2.9 | 3.1 | 3.0 | 2.6 | 1.7 |
| 1,250.00–1,299.90 | 2.5 | 3.8 | 2.5 | 2.5 | 2.6 | 2.6 | 2.7 | 2.3 | 1.4 |
| 1,300.00–1,349.90 | 2.1 | 2.5 | 1.6 | 2.3 | 2.5 | 2.1 | 2.2 | 2.3 | 1.1 |
| 1,350.00–1,399.90 | 1.6 | 0.6 | 1.2 | 1.9 | 1.8 | 1.4 | 1.7 | 2.2 | 1.3 |
| 1,400.00–1,449.90 | 1.1 | 0.1 | 0.6 | 1.2 | 1.0 | 1.0 | 1.2 | 1.8 | 0.9 |
| 1,450.00–1,499.90 | 0.8 | 0.0 | 0.3 | 0.8 | 0.7 | 0.6 | 0.9 | 1.4 | 0.7 |
| 1,500.00 or more | 3.0 | 0.1 | 0.5 | 1.5 | 1.9 | 2.4 | 4.2 | 6.2 | 4.1 |
| Average benefit (dollars) | 890.10 | 885.20 | 873.80 | 894.40 | 888.70 | 882.00 | 898.70 | 919.30 | 856.90 |

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

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. Mercer (410) 966-6377.

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

Table 5.F12—Number of widowed and surviving divorced mothers and fathers and total monthly benefits, by type of benefit, December 1950–2003, selected years

| Year | Total | | Widowed | | | | | | Surviving divorced | |
|------|---------|---|----------|---|---|---|---|---|--------------------|---|
| | | | Subtotal | | With at least 1 child under age 16 ^a | | Entitled solely because of at least 1 disabled child ^b | | | |
| | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) | Number | Total monthly benefits (thousands of dollars) |
| 1950 | 169,438 | 5,801 | 169,426 | 5,800 | 169,426 | 5,800 | ... | ... | 12 | ^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 | 558,933 | 89,400 | 537,002 | 85,637 | 21,931 | 3,764 | 19,794 | 3,065 |
| 1977 | 583,195 | 101,345 | 558,886 | 97,227 | 536,481 | 93,091 | 22,405 | 4,136 | 24,309 | 4,117 |
| 1978 | 576,343 | 109,714 | 548,463 | 104,506 | 525,879 | 100,028 | 22,584 | 4,478 | 27,880 | 5,209 |
| 1979 | 573,750 | 121,957 | 541,480 | 115,284 | 518,564 | 110,235 | 22,916 | 5,049 | 32,270 | 6,674 |
| 1980 | 562,316 | 138,426 | 525,661 | 129,754 | 502,639 | 123,885 | 23,022 | 5,869 | 36,655 | 8,671 |
| 1981 | 547,593 | 151,509 | 507,777 | 140,990 | 484,427 | 134,299 | 23,350 | 6,691 | 39,816 | 10,518 |
| 1982 | 514,772 | 155,876 | 474,003 | 144,207 | 451,159 | 137,068 | 22,844 | 7,139 | 40,769 | 11,669 |
| 1983 | 400,298 | 123,559 | 363,946 | 112,979 | 339,367 | 104,956 | 24,579 | 8,022 | 36,352 | 10,581 |
| 1984 | 382,411 | 122,957 | 346,319 | 112,002 | 318,076 | 102,391 | 28,243 | 9,612 | 36,092 | 10,995 |
| 1985 | 371,659 | 123,557 | 335,085 | 112,117 | 306,004 | 101,812 | 29,081 | 10,304 | 36,574 | 11,440 |
| 1986 | 350,546 | 118,602 | 315,572 | 107,470 | 286,290 | 96,887 | 29,282 | 10,583 | 34,974 | 11,132 |
| 1987 | 340,940 | 115,967 | 307,581 | 104,888 | 278,582 | 93,871 | 28,999 | 11,017 | 33,359 | 11,079 |
| 1988 | 317,761 | 116,902 | 285,265 | 105,596 | 256,463 | 94,096 | 28,802 | 11,500 | 32,496 | 11,306 |
| 1989 | 312,079 | 120,970 | 280,006 | 109,184 | 251,646 | 97,170 | 28,360 | 12,014 | 32,073 | 11,786 |
| 1990 | 303,923 | 124,340 | 272,526 | 112,103 | 244,965 | 99,683 | 27,561 | 12,420 | 31,397 | 12,237 |
| 1991 | 300,661 | 127,510 | 269,679 | 114,962 | 242,379 | 102,085 | 27,300 | 12,877 | 30,982 | 12,548 |
| 1992 | 294,716 | 128,748 | 263,630 | 115,884 | 236,990 | 102,840 | 26,640 | 13,045 | 30,546 | 12,864 |
| 1993 | 289,350 | 129,752 | 259,320 | 116,771 | 232,794 | 103,365 | 26,526 | 13,407 | 30,030 | 12,981 |
| 1994 | 283,072 | 131,463 | 253,928 | 118,399 | 227,709 | 104,658 | 26,219 | 13,741 | 29,144 | 13,064 |
| 1995 | 275,020 | 131,430 | 247,113 | 118,550 | 221,494 | 104,664 | 25,619 | 13,886 | 27,907 | 12,881 |
| 1996 | 242,135 | 124,678 | 218,171 | 112,627 | 193,664 | 98,799 | 24,507 | 13,828 | 23,964 | 12,051 |
| 1997 | 230,222 | 122,488 | 207,658 | 110,774 | 184,184 | 97,120 | 23,474 | 13,654 | 22,564 | 11,714 |
| 1998 | 220,610 | 120,247 | 199,447 | 109,001 | 176,660 | 95,491 | 22,787 | 13,510 | 21,163 | 11,246 |
| 1999 | 212,401 | 120,157 | 192,544 | 109,195 | 170,572 | 95,732 | 21,972 | 13,463 | 19,857 | 10,962 |
| 2000 | 203,052 | 120,812 | 184,397 | 109,941 | 164,420 | 97,063 | 19,977 | 12,878 | 18,655 | 10,871 |
| 2001 | 197,375 | 122,526 | 179,413 | 111,539 | 160,186 | 98,672 | 19,227 | 12,867 | 17,962 | 10,987 |
| 2002 | 194,117 | 124,267 | 176,447 | 113,097 | 158,020 | 100,413 | 18,427 | 12,685 | 17,670 | 11,170 |
| 2003 | 190,252 | 126,278 | 172,955 | 114,914 | 154,990 | 102,158 | 17,965 | 12,756 | 17,297 | 11,364 |

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

NOTE: ... = not applicable.

- a. Prior to August 1981, benefits were payable to mothers and fathers caring for a child under age 18. For mothers and fathers caring for a child who was at least age 14 and who were entitled in August 1981, benefits were continued until the child attained age 18 or September 1983, whichever came earlier.
- b. Excludes mothers and fathers who had both disabled and nondisabled entitled children in their care.
- c. Less than \$500.

CONTACT: Rona Blumenthal (410) 965-0163 or Dana N. 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 age, reduction status, and limitation of benefit, December 2003

| 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 | 4,026,650 | 891.50 | 1,870,000 | 991.20 | 928,180 | 1,104.70 | 941,820 | 879.30 | ^a 2,156,650 | 805.00 |
| 65-69 | 646,870 | 894.40 | 105,130 | 1,034.70 | 73,120 | 1,079.10 | 32,010 | 933.40 | 541,740 | 867.10 |
| 65 | 127,670 | 892.00 | 10,840 | 1,062.30 | 8,890 | 1,077.20 | 1,950 | 994.50 | 116,830 | 876.20 |
| 66 | 122,750 | 902.10 | 15,170 | 1,048.70 | 11,340 | 1,087.90 | 3,830 | 932.60 | 107,580 | 881.50 |
| 67 | 128,880 | 893.90 | 20,070 | 1,028.10 | 13,760 | 1,072.70 | 6,310 | 930.70 | 108,810 | 869.20 |
| 68 | 132,610 | 889.60 | 26,010 | 1,027.00 | 17,450 | 1,079.80 | 8,560 | 919.40 | 106,600 | 856.10 |
| 69 | 134,960 | 894.70 | 33,040 | 1,029.40 | 21,680 | 1,078.80 | 11,360 | 935.10 | 101,920 | 851.00 |
| 70-74 | 695,030 | 888.70 | 231,480 | 998.70 | 125,320 | 1,070.40 | 106,160 | 914.10 | 463,550 | 833.80 |
| 70 | 122,370 | 884.70 | 32,850 | 995.40 | 19,450 | 1,060.50 | 13,400 | 900.90 | 89,520 | 844.10 |
| 71 | 131,860 | 884.90 | 40,260 | 993.80 | 22,380 | 1,052.30 | 17,880 | 920.50 | 91,600 | 837.00 |
| 72 | 137,510 | 890.50 | 45,670 | 1,003.90 | 25,170 | 1,077.10 | 20,500 | 914.10 | 91,840 | 834.10 |
| 73 | 151,390 | 890.10 | 54,430 | 995.70 | 28,210 | 1,074.50 | 26,220 | 911.00 | 96,960 | 830.90 |
| 74 | 151,900 | 892.20 | 58,270 | 1,002.70 | 30,110 | 1,081.00 | 28,160 | 919.10 | 93,630 | 823.40 |
| 75-79 | 864,130 | 882.00 | 393,000 | 982.30 | 188,060 | 1,080.40 | 204,940 | 892.20 | 471,130 | 798.40 |
| 75 | 161,410 | 886.60 | 66,020 | 988.70 | 32,840 | 1,074.30 | 33,180 | 904.10 | 95,390 | 815.90 |
| 76 | 170,950 | 884.40 | 73,760 | 984.80 | 35,940 | 1,074.10 | 37,820 | 900.00 | 97,190 | 808.30 |
| 77 | 175,410 | 883.00 | 79,310 | 987.30 | 38,660 | 1,085.30 | 40,650 | 894.10 | 96,100 | 796.90 |
| 78 | 174,000 | 879.70 | 82,770 | 977.20 | 38,440 | 1,080.30 | 44,330 | 887.80 | 91,230 | 791.20 |
| 79 | 182,360 | 877.20 | 91,140 | 975.80 | 42,180 | 1,086.20 | 48,960 | 880.70 | 91,220 | 778.60 |
| 80-84 | 852,390 | 898.70 | 476,690 | 1,002.90 | 220,680 | 1,135.80 | 256,010 | 888.30 | 375,700 | 766.50 |
| 80 | 176,880 | 884.10 | 91,340 | 987.70 | 42,810 | 1,109.20 | 48,530 | 880.60 | 85,540 | 773.50 |
| 81 | 178,480 | 890.00 | 96,540 | 992.80 | 44,570 | 1,118.70 | 51,970 | 884.70 | 81,940 | 768.90 |
| 82 | 181,020 | 897.10 | 101,640 | 998.50 | 46,410 | 1,131.40 | 55,230 | 886.80 | 79,380 | 767.20 |
| 83 | 170,070 | 910.40 | 98,990 | 1,014.40 | 46,140 | 1,154.10 | 52,850 | 892.40 | 71,080 | 765.70 |
| 84 | 145,940 | 915.30 | 88,180 | 1,022.00 | 40,750 | 1,166.90 | 47,430 | 897.60 | 57,760 | 752.50 |
| 85-89 | 568,720 | 919.30 | 376,580 | 1,020.00 | 173,050 | 1,179.50 | 203,530 | 884.40 | 192,140 | 721.80 |
| 85 | 137,280 | 927.30 | 86,710 | 1,030.70 | 39,030 | 1,194.90 | 47,680 | 896.30 | 50,570 | 750.10 |
| 86 | 121,460 | 929.50 | 78,870 | 1,032.60 | 36,700 | 1,183.40 | 42,170 | 901.50 | 42,590 | 738.40 |
| 87 | 113,830 | 916.40 | 76,010 | 1,020.00 | 34,390 | 1,173.70 | 41,620 | 893.10 | 37,820 | 708.10 |
| 88 | 103,460 | 913.70 | 70,950 | 1,012.50 | 32,920 | 1,177.50 | 38,030 | 869.80 | 32,510 | 698.00 |
| 89 | 92,690 | 903.80 | 64,040 | 998.40 | 30,010 | 1,163.80 | 34,030 | 852.50 | 28,650 | 692.30 |
| 90 or older | 399,510 | 856.90 | 287,120 | 924.20 | 147,950 | 1,043.60 | 139,170 | 797.40 | 112,390 | 684.70 |

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

a. Includes 156,860 widows with benefits also limited due to early retirement of spouse.

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.G1—Percentage distribution of persons receiving both a retired-worker and a secondary benefit without and with reduction for early retirement, by sex and primary insurance amount, December 2003

| Primary insurance amount (dollars) | Total | | Without reduction for early retirement | | With reduction for early retirement | |
|-------------------------------------|-----------|---------|--|---------|-------------------------------------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| All dually entitled retired workers | 6,183,070 | 100.0 | 1,097,600 | 100.0 | 5,085,470 | 100.0 |
| Less than 250.00 | 634,180 | 10.3 | 96,550 | 8.8 | 537,630 | 10.6 |
| 250.00–299.90 | 368,060 | 6.0 | 52,550 | 4.8 | 315,510 | 6.2 |
| 300.00–349.90 | 522,150 | 8.4 | 83,080 | 7.6 | 439,070 | 8.6 |
| 350.00–399.90 | 368,600 | 6.0 | 58,060 | 5.3 | 310,540 | 6.1 |
| 400.00–449.90 | 382,140 | 6.2 | 62,190 | 5.7 | 319,950 | 6.3 |
| 450.00–499.90 | 578,470 | 9.4 | 100,740 | 9.2 | 477,730 | 9.4 |
| 500.00–549.90 | 639,570 | 10.3 | 115,580 | 10.5 | 523,990 | 10.3 |
| 550.00–599.90 | 572,150 | 9.3 | 103,650 | 9.4 | 468,500 | 9.2 |
| 600.00–649.90 | 486,620 | 7.9 | 90,460 | 8.2 | 396,160 | 7.8 |
| 650.00–699.90 | 360,990 | 5.8 | 69,520 | 6.3 | 291,470 | 5.7 |
| 700.00–749.90 | 261,960 | 4.2 | 51,310 | 4.7 | 210,650 | 4.1 |
| 750.00–799.90 | 213,910 | 3.5 | 44,040 | 4.0 | 169,870 | 3.3 |
| 800.00–849.90 | 173,250 | 2.8 | 36,890 | 3.4 | 136,360 | 2.7 |
| 850.00–899.90 | 140,330 | 2.3 | 30,380 | 2.8 | 109,950 | 2.2 |
| 900.00–949.90 | 117,270 | 1.9 | 25,070 | 2.3 | 92,200 | 1.8 |
| 950.00–999.90 | 93,590 | 1.5 | 18,770 | 1.7 | 74,820 | 1.5 |
| 1,000.00–1,049.90 | 73,120 | 1.2 | 15,200 | 1.4 | 57,920 | 1.1 |
| 1,050.00–1,099.90 | 58,650 | 0.9 | 11,730 | 1.1 | 46,920 | 0.9 |
| 1,100.00 or more | 138,060 | 2.2 | 31,830 | 2.9 | 106,230 | 2.1 |
| Men | 119,820 | 100.0 | 31,160 | 100.0 | 88,660 | 100.0 |
| Less than 250.00 | 7,990 | 6.7 | 3,780 | 12.1 | 4,210 | 4.7 |
| 250.00–299.90 | 3,900 | 3.3 | 1,590 | 5.1 | 2,310 | 2.6 |
| 300.00–349.90 | 5,760 | 4.8 | 2,120 | 6.8 | 3,640 | 4.1 |
| 350.00–399.90 | 3,990 | 3.3 | 1,520 | 4.9 | 2,470 | 2.8 |
| 400.00–449.90 | 4,160 | 3.5 | 1,470 | 4.7 | 2,690 | 3.0 |
| 450.00–499.90 | 6,200 | 5.2 | 2,090 | 6.7 | 4,110 | 4.6 |
| 500.00–549.90 | 7,310 | 6.1 | 2,480 | 8.0 | 4,830 | 5.4 |
| 550.00–599.90 | 7,090 | 5.9 | 2,220 | 7.1 | 4,870 | 5.5 |
| 600.00–649.90 | 6,770 | 5.7 | 2,060 | 6.6 | 4,710 | 5.3 |
| 650.00–699.90 | 5,880 | 4.9 | 1,450 | 4.7 | 4,430 | 5.0 |
| 700.00–749.90 | 5,280 | 4.4 | 1,090 | 3.5 | 4,190 | 4.7 |
| 750.00–799.90 | 5,390 | 4.5 | 1,150 | 3.7 | 4,240 | 4.8 |
| 800.00–849.90 | 5,080 | 4.2 | 870 | 2.8 | 4,210 | 4.7 |
| 850.00–899.90 | 4,490 | 3.7 | 890 | 2.9 | 3,600 | 4.1 |
| 900.00–949.90 | 4,530 | 3.8 | 770 | 2.5 | 3,760 | 4.2 |
| 950.00–999.90 | 4,730 | 3.9 | 600 | 1.9 | 4,130 | 4.7 |
| 1,000.00–1,049.90 | 5,200 | 4.3 | 920 | 3.0 | 4,280 | 4.8 |
| 1,050.00–1,099.90 | 4,970 | 4.1 | 680 | 2.2 | 4,290 | 4.8 |
| 1,100.00 or more | 21,100 | 17.6 | 3,410 | 10.9 | 17,690 | 20.0 |
| Women | 6,063,250 | 100.0 | 1,066,440 | 100.0 | 4,996,810 | 100.0 |
| Less than 250.00 | 626,190 | 10.3 | 92,770 | 8.7 | 533,420 | 10.7 |
| 250.00–299.90 | 364,160 | 6.0 | 50,960 | 4.8 | 313,200 | 6.3 |
| 300.00–349.90 | 516,390 | 8.5 | 80,960 | 7.6 | 435,430 | 8.7 |
| 350.00–399.90 | 364,610 | 6.0 | 56,540 | 5.3 | 308,070 | 6.2 |
| 400.00–449.90 | 377,980 | 6.2 | 60,720 | 5.7 | 317,260 | 6.3 |
| 450.00–499.90 | 572,270 | 9.4 | 98,650 | 9.3 | 473,620 | 9.5 |
| 500.00–549.90 | 632,260 | 10.4 | 113,100 | 10.6 | 519,160 | 10.4 |
| 550.00–599.90 | 565,060 | 9.3 | 101,430 | 9.5 | 463,630 | 9.3 |
| 600.00–649.90 | 479,850 | 7.9 | 88,400 | 8.3 | 391,450 | 7.8 |
| 650.00–699.90 | 355,110 | 5.9 | 68,070 | 6.4 | 287,040 | 5.7 |
| 700.00–749.90 | 256,680 | 4.2 | 50,220 | 4.7 | 206,460 | 4.1 |

(Continued)

5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G1—Percentage distribution of persons receiving both a retired-worker and a secondary benefit without and with reduction for early retirement, by sex and primary insurance amount, December 2003—Continued

| Primary insurance amount (dollars) | Total | | Without reduction for early retirement | | With reduction for early retirement | |
|------------------------------------|---------|---------|--|---------|-------------------------------------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| 750.00–799.90 | 208,520 | 3.4 | 42,890 | 4.0 | 165,630 | 3.3 |
| 800.00–849.90 | 168,170 | 2.8 | 36,020 | 3.4 | 132,150 | 2.6 |
| 850.00–899.90 | 135,840 | 2.2 | 29,490 | 2.8 | 106,350 | 2.1 |
| 900.00–949.90 | 112,740 | 1.9 | 24,300 | 2.3 | 88,440 | 1.8 |
| 950.00–999.90 | 88,860 | 1.5 | 18,170 | 1.7 | 70,690 | 1.4 |
| 1,000.00–1,049.90 | 67,920 | 1.1 | 14,280 | 1.3 | 53,640 | 1.1 |
| 1,050.00–1,099.90 | 53,680 | 0.9 | 11,050 | 1.0 | 42,630 | 0.9 |
| 1,100.00 or more | 116,960 | 1.9 | 28,420 | 2.7 | 88,540 | 1.8 |

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

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.G2—Number receiving both a retired-worker and a secondary benefit, by sex and type of secondary benefit, December 1952–2003

| Year | 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 | ^a 282,940 | ^a 10.3 | ^a 324,930 | ^a 12.3 | ^a 3,740 | ^a 7,120 | ^a 4,110 | ^a 1,910 | ^a 1,100 |
| 1966 | 706,860 | 699,080 | 15.1 | ^a 315,550 | ^a 11.2 | ^a 379,440 | ^a 13.2 | ^a 4,090 | ^a 7,780 | ^a 4,470 | ^a 2,260 | ^a 1,050 |
| 1967 | 770,190 | 760,950 | 15.7 | ^a 334,200 | ^a 11.8 | ^a 422,480 | ^a 13.8 | ^a 4,270 | ^a 9,240 | ^a 5,190 | ^a 3,070 | ^a 980 |
| 1968 | 842,560 | 831,760 | 16.3 | ^a 354,750 | ^a 12.4 | ^a 472,590 | ^a 14.5 | ^a 4,420 | ^a 10,800 | ^a 5,810 | ^a 4,110 | ^a 880 |
| 1969 | 920,250 | 909,720 | 17.0 | ^a 376,520 | ^a 13.0 | ^a 528,660 | ^a 15.3 | ^a 4,540 | ^a 10,530 | ^a 5,620 | ^a 4,160 | ^a 750 |
| 1970 | 977,340 | 966,780 | 17.1 | ^a 388,210 | ^a 13.3 | ^a 573,950 | ^a 15.9 | ^a 4,620 | ^a 10,560 | ^a 5,530 | ^a 4,400 | ^a 630 |
| 1971 | 1,069,940 | 1,060,120 | 17.7 | ^a 411,710 | ^a 13.8 | ^a 643,730 | ^a 16.9 | ^a 4,680 | ^a 9,820 | ^a 5,130 | ^a 4,170 | ^a 520 |
| 1972 | 1,183,369 | 1,170,286 | 18.5 | ^a 477,333 | ^a 15.5 | ^a 688,087 | ^a 17.3 | ^a 4,866 | ^a 13,083 | ^a 6,797 | ^a 5,442 | ^a 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 | ^a 554,844 | ^a 17.1 | ^a 956,662 | ^a 21.4 | ^a 4,820 | ^a 18,257 | ^a 6,592 | ^a 11,080 | ^a 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 | ^a 669,792 | ^a 19.5 | ^a 1,137,251 | ^a 23.4 | ^a 4,965 | ^a 15,920 | ^a 7,497 | ^a 7,779 | ^a 644 |
| 1977 | 2,026,534 | 1,991,915 | 24.6 | 762,250 | 21.4 | 1,225,344 | 24.3 | 4,321 | 34,619 | 14,557 | 19,544 | 518 |
| 1978 | 2,208,490 | 2,163,011 | 25.7 | 836,004 | 22.8 | 1,322,897 | 25.3 | 4,110 | 45,479 | 17,832 | 27,192 | 455 |
| 1979 | 2,435,848 | 2,380,260 | 27.1 | 917,747 | 24.4 | 1,458,611 | 26.6 | 3,902 | 55,588 | 20,179 | 35,004 | 405 |
| 1980 | 2,660,037 | 2,594,467 | 28.5 | 1,015,672 | 26.2 | 1,575,085 | 27.8 | 3,710 | 65,570 | 22,597 | 42,580 | 393 |
| 1981 | ^b | ^b | ^b | ^b | ^b | ^b | ^b | ^b | ^b | ^b | ^b | ^b |
| 1982 | 3,109,239 | 3,031,518 | 31.1 | 1,239,736 | 29.8 | 1,788,556 | 29.5 | 3,226 | 77,721 | 24,787 | 52,604 | 330 |
| 1983 | 3,355,148 | 3,267,890 | 32.5 | 1,369,396 | 31.6 | 1,895,579 | 30.3 | 2,915 | 87,258 | 27,449 | 59,518 | 291 |
| 1984 | 3,568,639 | 3,479,191 | 33.7 | 1,479,756 | 33.2 | 1,996,805 | 31.0 | 2,630 | 89,448 | 27,189 | 62,011 | 248 |
| 1985 | 3,801,183 | 3,708,856 | 34.9 | 1,594,226 | 34.7 | 2,112,245 | 31.8 | 2,385 | 92,327 | 26,912 | 65,202 | 213 |
| 1986 | 4,032,760 | 3,934,811 | 36.1 | 1,719,449 | 36.2 | 2,213,225 | 32.5 | 2,137 | 97,949 | 27,693 | 70,064 | 192 |
| 1987 | 4,214,214 | 4,116,759 | 36.9 | 1,804,946 | 37.3 | 2,309,899 | 33.1 | 1,914 | 97,455 | 26,928 | 70,359 | 168 |
| 1988 | 4,403,012 | 4,302,714 | 37.9 | 1,892,763 | 38.5 | 2,408,232 | 33.8 | 1,719 | 100,298 | 27,210 | 72,942 | 146 |
| 1989 | 4,590,475 | 4,487,314 | 38.7 | 1,982,095 | 39.5 | 2,503,679 | 34.4 | 1,540 | 103,161 | 27,484 | 75,543 | 134 |
| 1990 | 4,783,122 | 4,677,680 | 39.5 | 2,076,737 | 40.5 | 2,599,560 | 35.1 | 1,383 | 105,442 | 27,463 | 77,862 | 117 |
| 1991 | 4,959,610 | 4,852,656 | 40.2 | 2,158,022 | 41.5 | 2,693,388 | 35.7 | 1,246 | 106,954 | 27,195 | 79,654 | 105 |
| 1992 | 5,140,627 | 5,032,206 | 41.0 | 2,242,029 | 42.3 | 2,789,029 | 36.3 | 1,148 | 108,421 | 26,849 | 81,475 | 97 |
| 1993 | 5,285,960 | 5,176,650 | 41.6 | 2,312,000 | 43.1 | 2,863,510 | 37.0 | 1,140 | 109,310 | 26,330 | 82,920 | 60 |
| 1994 | 5,419,910 | 5,308,300 | 42.1 | 2,359,470 | 43.9 | 2,947,820 | 37.6 | 1,010 | 111,610 | 26,920 | 84,660 | 30 |
| 1995 | 5,533,200 | 5,420,320 | 42.5 | 2,397,710 | 44.5 | 3,021,720 | 38.0 | 890 | 112,880 | 26,660 | 86,190 | 30 |
| 1996 | 5,629,780 | 5,517,510 | 42.8 | 2,429,520 | 45.3 | 3,087,130 | 38.3 | 860 | 112,270 | 25,750 | 86,480 | 40 |
| 1997 | 5,729,620 | 5,617,590 | 42.7 | 2,461,060 | 46.0 | 3,155,760 | 39.6 | 770 | 112,030 | 24,540 | 87,460 | 30 |
| 1998 | 5,810,410 | 5,699,080 | 42.8 | 2,482,950 | 46.7 | 3,215,380 | 40.4 | 750 | 111,330 | 23,740 | 87,560 | 30 |
| 1999 | 5,883,950 | 5,772,260 | 42.9 | 2,499,200 | 47.3 | 3,272,420 | 41.0 | 640 | 111,690 | 23,560 | 88,100 | 30 |

(Continued)

5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G2—Number receiving both a retired-worker and a secondary benefit, by sex and type of secondary benefit, December 1952–2003—Continued

| Year | Total | Women | | | | | | | Men | | | |
|------|-----------|-----------|---|----------------|---|-----------------|---|------------------|----------|-------------------|-------------------|------------------|
| | | Subtotal | | Wife's benefit | | Widow's benefit | | Parent's benefit | Subtotal | Husband's benefit | Widower's benefit | Parent's benefit |
| | | Number | Percentage of all women retired workers | Number | Percentage of all women entitled to wife's benefit because of age | Number | Percentage of all women entitled to widow's benefit | | | | | |
| 2000 | 6,009,800 | 5,896,390 | 42.9 | 2,568,470 | 48.2 | 3,327,360 | 41.6 | 560 | 113,410 | 24,660 | 88,720 | 30 |
| 2001 | 6,076,350 | 5,961,580 | 42.9 | 2,583,730 | 48.9 | 3,377,330 | 42.4 | 520 | 114,770 | 25,570 | 89,170 | 30 |
| 2002 | 6,134,800 | 6,016,680 | 42.7 | 2,591,820 | 49.5 | 3,424,390 | 43.0 | 470 | 118,120 | 27,090 | 91,000 | 30 |
| 2003 | 6,183,070 | 6,063,250 | 42.4 | 2,602,590 | 50.1 | 3,460,280 | 43.7 | 380 | 119,820 | 28,160 | 91,640 | 20 |

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1993–2002 are based on a 10 percent sample. All other years are 100 percent data.

- a. Distributions by type of secondary benefit are estimated.
- b. Data not available.

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.G3—Number receiving both a retired-worker and a secondary benefit and average monthly benefit, by type of secondary benefit, December 2003

| Type of secondary benefit | Number | Average monthly benefit (dollars) | | |
|-------------------------------------|-----------|-----------------------------------|------------------------|---------------------------|
| | | Combined benefit | Retired-worker benefit | Reduced secondary benefit |
| All dually entitled retired workers | 6,183,070 | 831.20 | 459.40 | 371.80 |
| Wives and husbands | 2,630,750 | 555.20 | 370.20 | 185.00 |
| Wives of— | 2,602,590 | 555.90 | 370.30 | 185.60 |
| Retired workers | 2,571,170 | 556.20 | 370.40 | 185.80 |
| Disabled workers | 31,420 | 527.00 | 354.40 | 172.60 |
| Husbands of— | 28,160 | 487.80 | 362.00 | 125.80 |
| Retired workers | 27,110 | 488.70 | 362.50 | 126.20 |
| Disabled workers | 1,050 | 464.30 | 349.50 | 114.80 |
| Widow(er)s | 3,551,920 | 1,035.70 | 525.60 | 510.10 |
| Widows | 3,460,280 | 1,037.60 | 520.30 | 517.30 |
| Widowers | 91,640 | 963.60 | 725.20 | 238.40 |
| Parents | 400 | 991.80 | 479.50 | 512.30 |

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

CONTACT: Barbara Lingg (410) 965-0156 or Robert L. Hackendorf (410) 965-5536.

Table 5.G4—Number receiving both a retired-worker and a secondary benefit, average monthly benefit, and retired-worker benefit as a percentage of combined benefit, December 2003

| Total combined monthly benefit (dollars) | Number | | Average combined monthly benefit (dollars) | | Retired-worker benefit as a percentage of combined monthly benefit | |
|--|------------------------|------------------------|--|------------|--|------------|
| | Wives or husbands | Widow(er)s | Wives or husbands | Widow(er)s | Wives or husbands | Widow(er)s |
| All dually entitled retired workers | ^a 2,630,750 | ^b 3,551,920 | 552.30 | 1,042.10 | 67 | 50 |
| Less than 200.00 | 16,820 | 2,630 | 155.40 | 153.10 | 81 | 78 |
| 200.00–249.90 | 22,870 | 3,340 | 227.00 | 229.30 | 76 | 76 |
| 250.00–299.90 | 36,310 | 6,940 | 276.40 | 278.60 | 73 | 74 |
| 300.00–349.90 | 56,830 | 13,470 | 327.10 | 327.80 | 70 | 75 |
| 350.00–399.90 | 94,300 | 16,240 | 377.20 | 377.60 | 68 | 70 |
| 400.00–449.90 | 178,340 | 24,460 | 427.80 | 427.10 | 68 | 68 |
| 450.00–499.90 | 356,410 | 36,690 | 477.30 | 476.90 | 67 | 68 |
| 500.00–549.90 | 569,830 | 48,470 | 526.30 | 525.00 | 68 | 67 |
| 550.00–599.90 | 494,220 | 60,270 | 573.20 | 575.20 | 69 | 66 |
| 600.00–649.90 | 325,760 | 75,730 | 623.50 | 625.70 | 67 | 65 |
| 650.00–699.90 | 226,400 | 91,850 | 672.80 | 675.60 | 66 | 64 |
| 700.00–749.90 | 124,900 | 109,960 | 722.50 | 725.80 | 63 | 63 |
| 750.00–799.90 | 66,770 | 139,760 | 772.90 | 775.90 | 61 | 61 |
| 800.00–849.90 | 35,570 | 178,450 | 819.90 | 825.70 | 59 | 60 |
| 850.00–899.90 | 12,250 | 225,410 | 869.90 | 875.80 | 55 | 59 |
| 900.00–949.90 | 3,730 | 262,880 | 920.10 | 925.20 | 50 | 57 |
| 950.00–999.90 | 2,090 | 295,710 | 974.50 | 975.40 | 47 | 54 |
| 1,000.00–1,049.90 | ^c 7,350 | 302,830 | ^c 1,195.40 | 1,024.80 | ^c 41 | 52 |
| 1,050.00–1,099.90 | ... | 288,860 | ... | 1,075.20 | ... | 51 |
| 1,100.00–1,149.90 | ... | 256,390 | ... | 1,123.90 | ... | 49 |
| 1,150.00–1,199.90 | ... | 207,000 | ... | 1,174.20 | ... | 48 |
| 1,200.00–1,249.90 | ... | 178,870 | ... | 1,224.20 | ... | 47 |
| 1,250.00–1,299.90 | ... | 159,330 | ... | 1,274.10 | ... | 45 |
| 1,300.00–1,349.90 | ... | 139,530 | ... | 1,324.70 | ... | 44 |
| 1,350.00–1,399.90 | ... | 107,790 | ... | 1,372.50 | ... | 43 |
| 1,400.00–1,449.90 | ... | 75,630 | ... | 1,423.80 | ... | 42 |
| 1,450.00–1,499.90 | ... | 55,590 | ... | 1,473.70 | ... | 41 |
| 1,500.00 or more | ... | 187,840 | ... | 1,751.90 | ... | 36 |

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

NOTE: ... = not applicable.

- a. Includes 28,160 husbands.
- b. Includes 91,640 widowers.
- c. \$1,000 or more.

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5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G5—Percentage distribution, by total combined monthly benefit and retired-worker benefit, December 2003

| Total combined monthly benefit (dollars) | Number | Percentage distribution by dollar amount of retired-worker benefit | | | | | | | | | | | | |
|---|------------------------|--|------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|
| | | Total | Less than 200.00 | 200.00–249.90 | 250.00–299.90 | 300.00–349.90 | 350.00–399.90 | 400.00–449.90 | 450.00–499.90 | 500.00–549.90 | 550.00–599.90 | 600.00–649.90 | 650.00–699.90 | 700.00 or more |
| Dually entitled wives and husbands | | | | | | | | | | | | | | |
| All | ^a 2,630,750 | 100.0 | 13.8 | 10.2 | 10.0 | 9.2 | 11.4 | 14.4 | 12.6 | 8.9 | 4.9 | 2.6 | 1.2 | 0.8 |
| Less than 200.00 | 16,820 | 100.0 | 100.0 | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... |
| 200.00–249.90 | 22,870 | 100.0 | 65.4 | 34.6 | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... |
| 250.00–299.90 | 36,310 | 100.0 | 45.4 | 29.4 | 25.2 | ... | ... | ... | ... | ... | ... | ... | ... | ... |
| 300.00–349.90 | 56,830 | 100.0 | 33.7 | 24.2 | 24.5 | 17.6 | ... | ... | ... | ... | ... | ... | ... | ... |
| 350.00–399.90 | 94,300 | 100.0 | 26.8 | 20.2 | 19.9 | 18.1 | 14.9 | ... | ... | ... | ... | ... | ... | ... |
| 400.00–449.90 | 178,340 | 100.0 | 21.2 | 15.0 | 15.2 | 13.8 | 19.2 | 15.7 | ... | ... | ... | ... | ... | ... |
| 450.00–499.90 | 356,410 | 100.0 | 17.0 | 12.7 | 12.0 | 10.9 | 16.0 | 20.4 | 11.0 | ... | ... | ... | ... | ... |
| 500.00–549.90 | 569,830 | 100.0 | 12.1 | 9.8 | 9.8 | 9.8 | 13.7 | 18.9 | 17.1 | 8.8 | ... | ... | ... | ... |
| 550.00–599.90 | 494,220 | 100.0 | 8.1 | 7.3 | 8.1 | 8.2 | 11.0 | 17.1 | 17.7 | 15.9 | 6.4 | ... | ... | ... |
| 600.00–649.90 | 325,760 | 100.0 | 7.9 | 6.6 | 7.3 | 7.4 | 8.6 | 13.1 | 15.6 | 14.9 | 13.1 | 5.4 | ... | ... |
| 650.00–699.90 | 226,400 | 100.0 | 7.4 | 6.3 | 6.3 | 6.3 | 7.5 | 10.6 | 13.1 | 13.6 | 12.3 | 11.8 | 4.7 | ... |
| 700.00 or more | 252,660 | 100.0 | 7.9 | 6.9 | 7.0 | 6.6 | 6.5 | 7.7 | 10.3 | 10.9 | 10.3 | 9.3 | 8.4 | 8.1 |
| Dually entitled widow(er)s | | | | | | | | | | | | | | |
| All | ^b 3,551,920 | 100.0 | 6.1 | 5.3 | 7.5 | 6.5 | 7.8 | 8.7 | 8.4 | 8.0 | 7.0 | 6.4 | 5.6 | 22.5 |
| Less than 200.00 | 2,630 | 100.0 | 100.0 | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... |
| 200.00–249.90 | 3,340 | 100.0 | 62.6 | 37.4 | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... |
| 250.00–299.90 | 6,940 | 100.0 | 41.0 | 29.0 | 30.0 | ... | ... | ... | ... | ... | ... | ... | ... | ... |
| 300.00–349.90 | 13,470 | 100.0 | 23.4 | 18.4 | 36.7 | 21.5 | ... | ... | ... | ... | ... | ... | ... | ... |
| 350.00–399.90 | 16,240 | 100.0 | 21.5 | 15.9 | 26.9 | 21.4 | 14.3 | ... | ... | ... | ... | ... | ... | ... |
| 400.00–449.90 | 24,460 | 100.0 | 18.1 | 13.4 | 20.0 | 18.8 | 17.8 | 11.8 | ... | ... | ... | ... | ... | ... |
| 450.00–499.90 | 36,690 | 100.0 | 13.7 | 9.5 | 16.2 | 15.8 | 16.5 | 17.4 | 10.9 | ... | ... | ... | ... | ... |
| 500.00–549.90 | 48,470 | 100.0 | 11.3 | 8.2 | 13.1 | 13.1 | 14.6 | 16.3 | 14.4 | 9.0 | ... | ... | ... | ... |
| 550.00–599.90 | 60,270 | 100.0 | 9.1 | 7.0 | 11.5 | 11.5 | 12.0 | 14.6 | 14.0 | 13.4 | 6.9 | ... | ... | ... |
| 600.00–649.90 | 75,730 | 100.0 | 7.8 | 6.7 | 9.3 | 9.9 | 10.9 | 12.4 | 13.6 | 12.6 | 11.1 | 5.6 | ... | ... |
| 650.00–699.90 | 91,850 | 100.0 | 6.6 | 6.0 | 9.3 | 7.9 | 10.1 | 11.8 | 12.1 | 12.1 | 10.4 | 9.5 | 4.2 | ... |
| 700.00–749.90 | 109,960 | 100.0 | 5.8 | 5.4 | 8.3 | 7.7 | 8.1 | 10.3 | 11.1 | 11.6 | 10.7 | 9.6 | 7.6 | 3.8 |
| 750.00–799.90 | 139,760 | 100.0 | 5.3 | 4.8 | 7.7 | 7.5 | 8.1 | 10.2 | 10.4 | 10.4 | 9.2 | 9.1 | 7.9 | 9.5 |
| 800.00–849.90 | 178,450 | 100.0 | 4.8 | 4.7 | 7.7 | 6.8 | 7.9 | 9.1 | 9.0 | 9.8 | 9.3 | 8.4 | 8.0 | 14.5 |
| 850.00–899.90 | 225,410 | 100.0 | 4.5 | 4.5 | 7.2 | 6.3 | 7.8 | 8.5 | 8.4 | 9.1 | 8.9 | 8.2 | 7.3 | 19.2 |
| 900.00–949.90 | 262,880 | 100.0 | 4.6 | 4.4 | 6.8 | 6.3 | 7.4 | 8.5 | 8.2 | 8.4 | 7.9 | 7.7 | 7.0 | 22.9 |
| 950.00–999.90 | 295,710 | 100.0 | 5.8 | 5.2 | 6.8 | 6.0 | 7.9 | 8.4 | 8.1 | 7.8 | 7.2 | 6.9 | 6.3 | 23.5 |
| 1,000.00–1,049.90 | 302,830 | 100.0 | 6.1 | 5.1 | 6.9 | 5.6 | 7.6 | 8.1 | 7.8 | 7.6 | 6.8 | 6.7 | 6.3 | 25.5 |
| 1,050.00–1,099.90 | 288,860 | 100.0 | 5.7 | 4.9 | 6.7 | 5.6 | 7.3 | 8.5 | 8.0 | 7.7 | 6.6 | 6.3 | 5.7 | 27.0 |
| 1,100.00–1,149.90 | 256,390 | 100.0 | 5.6 | 4.9 | 6.2 | 5.3 | 7.2 | 8.0 | 7.9 | 7.7 | 6.8 | 6.5 | 5.7 | 28.1 |
| 1,150.00–1,199.90 | 207,000 | 100.0 | 5.3 | 4.8 | 6.2 | 5.2 | 7.0 | 8.5 | 7.8 | 7.2 | 6.8 | 6.1 | 5.6 | 29.6 |
| 1,200.00–1,249.90 | 178,870 | 100.0 | 5.7 | 4.7 | 6.2 | 5.1 | 7.1 | 7.7 | 7.8 | 7.2 | 6.2 | 5.8 | 5.6 | 31.1 |
| 1,250.00–1,299.90 | 159,330 | 100.0 | 5.7 | 5.5 | 6.0 | 5.1 | 6.7 | 7.9 | 7.4 | 7.1 | 6.6 | 6.0 | 5.2 | 30.8 |
| 1,300.00–1,349.90 | 139,530 | 100.0 | 5.4 | 5.0 | 6.1 | 5.0 | 6.5 | 7.6 | 7.8 | 7.0 | 6.1 | 5.7 | 5.6 | 32.2 |
| 1,350.00–1,399.90 | 107,790 | 100.0 | 4.9 | 5.0 | 7.1 | 5.9 | 6.5 | 7.6 | 7.3 | 7.0 | 5.7 | 5.9 | 4.7 | 32.4 |
| 1,400.00–1,449.90 | 75,630 | 100.0 | 5.0 | 5.1 | 6.3 | 5.8 | 6.9 | 7.2 | 7.4 | 7.0 | 5.9 | 5.5 | 5.3 | 32.7 |
| 1,450.00–1,499.90 | 55,590 | 100.0 | 4.5 | 4.8 | 6.9 | 6.1 | 6.5 | 7.8 | 7.4 | 7.0 | 5.7 | 5.1 | 4.7 | 33.5 |
| 1,500.00 or more | 187,840 | 100.0 | 4.7 | 4.9 | 6.7 | 6.3 | 6.6 | 7.2 | 7.0 | 6.1 | 5.3 | 5.2 | 4.9 | 35.0 |

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

NOTE: ... = not applicable.

a. Includes 28,160 husbands.

b. Includes 91,640 widowers.

CONTACT: Barbara Lingg (410) 965-0156 or Robert L. Hackendorf (410) 965-5536.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H1—Number and average monthly family benefit for selected family groups, December 1945–2003, selected years

| Year | Retired-worker families | | | | Survivor families | | | | Disabled-worker families | | | | | Worker and spouse |
|---|-------------------------|--------|--------|------------------------------|-------------------------|-------------------------------|------------|--------------------|--------------------------|--------|--------|---------------------------------|--------------------|-------------------|
| | Worker only | | | Worker and wife ^a | Non-disabled widow only | Widowed mother or father and— | | | Worker only | | | Worker, wife, ^b and— | | |
| | All | Men | Women | | | 1 child | 2 children | 3 or more children | All | Men | Women | 1 child | 2 or more children | |
| Number (thousands) | | | | | | | | | | | | | | |
| 1945 | 416 | 338 | 78 | 181 | 95 | 86 | 48 | 24 | ... | ... | ... | ... | ... | ... |
| 1950 | 1,240 | 939 | 301 | 498 | 314 | 82 | 53 | 33 | ... | ... | ... | ... | ... | ... |
| 1955 | 3,266 | 2,054 | 1,212 | 1,124 | 700 | 126 | 86 | 80 | ... | ... | ... | ... | ... | ... |
| 1960 | 5,742 | 2,922 | 2,820 | 2,122 | 1,527 | 172 | 113 | 114 | 357 | 261 | 96 | 22 | 32 | 22 |
| 1965 | 8,386 | 4,137 | 4,249 | 2,400 | 2,332 | 182 | 135 | 153 | 714 | 481 | 232 | 54 | 109 | 30 |
| 1970 | 10,533 | 4,904 | 5,629 | 2,457 | 3,080 | 183 | 155 | 182 | 1,054 | 680 | 374 | 77 | 164 | 43 |
| 1975 | 13,520 | 6,134 | 7,385 | 2,618 | 3,606 | 221 | 182 | 176 | 1,750 | 1,080 | 671 | 137 | 250 | 66 |
| 1980 | 16,314 | 7,286 | 9,028 | 2,736 | 4,033 | 239 | 184 | 134 | 2,061 | 1,257 | 804 | 154 | 228 | 80 |
| 1985 | 19,132 | 8,601 | 10,531 | 2,861 | 4,606 | 158 | 131 | 74 | 2,039 | 1,267 | 772 | 84 | 140 | 76 |
| 1986 | 19,664 | 8,849 | 10,816 | 2,883 | 4,666 | 151 | 123 | 68 | 2,096 | 1,301 | 795 | 82 | 136 | 74 |
| 1987 | 20,137 | 9,064 | 11,074 | 2,893 | 4,709 | 141 | 115 | 62 | 2,154 | 1,338 | 816 | 79 | 132 | 74 |
| 1988 | 20,567 | 9,264 | 11,302 | 2,896 | 4,749 | 137 | 112 | 61 | 2,194 | 1,353 | 841 | 77 | 125 | 71 |
| 1989 | 21,036 | 9,495 | 11,541 | 2,903 | 4,788 | 137 | 109 | 58 | 2,262 | 1,390 | 872 | 75 | 120 | 67 |
| 1990 | 21,537 | 9,752 | 11,786 | 2,914 | 4,825 | 133 | 106 | 57 | 2,370 | 1,448 | 922 | 75 | 118 | 63 |
| 1991 | 21,978 | 9,985 | 11,992 | 2,918 | 4,850 | 130 | 106 | 55 | 2,523 | 1,529 | 994 | 76 | 119 | 61 |
| 1992 | 22,434 | 10,218 | 12,216 | 2,928 | 4,871 | 129 | 103 | 54 | 2,738 | 1,643 | 1,094 | 78 | 125 | 61 |
| 1993 | 22,796 | 10,404 | 12,392 | 2,912 | 4,870 | 126 | 103 | 53 | 2,935 | 1,743 | 1,192 | 78 | 127 | 59 |
| 1994 | 23,124 | 10,573 | 12,552 | 2,885 | 4,862 | 123 | 100 | 51 | 3,121 | 1,830 | 1,292 | 76 | 128 | 57 |
| 1995 | 23,433 | 10,732 | 12,701 | 2,845 | 4,841 | 120 | 97 | 49 | 3,305 | 1,909 | 1,396 | 75 | 124 | 55 |
| 1996 | 23,705 | 10,874 | 12,831 | 2,799 | 4,815 | 117 | 78 | 41 | 3,473 | 1,973 | 1,500 | 61 | 104 | 53 |
| 1997 | 24,124 | 11,027 | 13,097 | 2,759 | 4,657 | 113 | 74 | 37 | 3,593 | 2,006 | 1,588 | 57 | 91 | 53 |
| 1998 | 24,409 | 11,163 | 13,246 | 2,703 | 4,589 | 111 | 69 | 34 | 3,769 | 2,074 | 1,695 | 52 | 80 | 53 |
| 1999 | 24,730 | 11,337 | 13,394 | 2,651 | 4,536 | 107 | 67 | 32 | 3,924 | 2,131 | 1,793 | 49 | 72 | 52 |
| 2000 | 25,452 | 11,780 | 13,672 | 2,638 | 4,491 | 102 | 65 | 30 | 4,080 | 2,191 | 1,890 | 45 | 65 | 50 |
| 2001 | 25,838 | 11,990 | 13,848 | 2,581 | 4,416 | 98 | 63 | 29 | 4,292 | 2,282 | 2,010 | 43 | 60 | 51 |
| 2002 | 26,247 | 12,218 | 14,029 | 2,525 | 4,353 | 98 | 62 | 28 | 4,536 | 2,391 | 2,145 | 41 | 56 | 50 |
| 2003 | 26,664 | 12,420 | 14,224 | 2,468 | 4,286 | 96 | 61 | 27 | 4,832 | 2,532 | 2,301 | 40 | 55 | 53 |
| Average monthly family benefit (dollars) | | | | | | | | | | | | | | |
| 1945 | 23.50 | 24.50 | 19.50 | 38.50 | 20.20 | 34.10 | 47.70 | 50.40 | ... | ... | ... | ... | ... | ... |
| 1950 | 42.20 | 44.60 | 34.80 | 71.70 | 36.50 | 76.90 | 93.90 | 92.40 | ... | ... | ... | ... | ... | ... |
| 1955 | 59.10 | 64.60 | 49.80 | 103.50 | 48.70 | 106.80 | 135.40 | 133.20 | ... | ... | ... | ... | ... | ... |
| 1960 | 69.90 | 79.90 | 59.60 | 123.90 | 57.70 | 131.70 | 188.00 | 181.70 | 87.90 | 91.90 | 76.90 | 184.70 | 192.20 | 135.50 |
| 1965 | 80.10 | 90.50 | 70.00 | 141.50 | 73.90 | 153.00 | 219.80 | 218.10 | 95.40 | 100.70 | 85.00 | 201.00 | 216.30 | 145.90 |
| 1970 | 114.20 | 128.70 | 101.60 | 198.90 | 102.40 | 213.00 | 291.10 | 289.90 | 128.10 | 136.30 | 113.10 | 264.10 | 273.20 | 199.20 |
| 1975 | 201.60 | 225.50 | 181.80 | 343.90 | 195.90 | 367.20 | 468.60 | 461.80 | 218.90 | 240.00 | 185.00 | 441.00 | 454.00 | 344.00 |
| 1980 | 333.00 | 377.10 | 297.40 | 566.60 | 311.60 | 612.80 | 759.20 | 740.50 | 355.40 | 396.20 | 291.70 | 727.00 | 746.10 | 573.00 |
| 1985 | 465.80 | 531.80 | 412.00 | 813.90 | 434.30 | 829.60 | 981.50 | 924.90 | 466.90 | 523.10 | 374.60 | 898.10 | 895.20 | 765.00 |
| 1986 | 475.20 | 542.60 | 420.10 | 831.30 | 444.90 | 841.70 | 994.00 | 939.80 | 470.70 | 527.80 | 377.40 | 896.90 | 888.30 | 773.30 |
| 1987 | 499.20 | 570.40 | 440.80 | 873.30 | 468.70 | 882.10 | 1,032.30 | 968.90 | 491.60 | 552.00 | 392.60 | 929.40 | 918.30 | 815.50 |
| 1988 | 522.70 | 597.20 | 461.70 | 914.10 | 493.60 | 921.80 | 1,070.40 | 1,012.90 | 512.20 | 576.10 | 409.50 | 960.20 | 938.40 | 855.40 |
| 1989 | 552.10 | 630.70 | 487.40 | 965.60 | 522.80 | 967.80 | 1,120.00 | 1,064.60 | 539.30 | 607.10 | 431.20 | 1,009.40 | 971.90 | 903.70 |
| 1990 | 588.30 | 671.90 | 519.10 | 1,026.60 | 557.90 | 1,020.20 | 1,177.70 | 1,124.60 | 570.40 | 642.80 | 456.80 | 1,062.10 | 1,016.00 | 960.80 |
| 1991 | 614.70 | 702.00 | 542.10 | 1,071.70 | 584.90 | 1,059.80 | 1,216.80 | 1,160.60 | 592.30 | 668.40 | 475.50 | 1,098.00 | 1,043.30 | 1,004.70 |
| 1992 | 637.80 | 728.10 | 562.30 | 1,110.50 | 609.00 | 1,086.90 | 1,252.40 | 1,190.80 | 609.50 | 688.70 | 490.70 | 1,122.10 | 1,057.40 | 1,045.00 |
| 1993 | 659.10 | 751.90 | 581.20 | 1,145.40 | 632.20 | 1,114.20 | 1,282.60 | 1,229.40 | 625.50 | 707.20 | 506.00 | 1,143.00 | 1,074.20 | 1,078.20 |
| 1994 | 682.30 | 777.80 | 601.80 | 1,183.70 | 657.10 | 1,150.10 | 1,328.40 | 1,271.00 | 646.20 | 731.80 | 525.00 | 1,177.60 | 1,100.00 | 1,118.60 |

(Continued)

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H1—Number and average monthly family benefit for selected family groups, December 1945–2003, selected years—Continued

| Year | Retired-worker families | | | | Survivor families | | | | Disabled-worker families | | | | | |
|---|-------------------------|----------|--------|------------------------------|-------------------------|-------------------------------|------------|--------------------|--------------------------|--------|--------|---------------------------------|--------------------|-------------------|
| | Worker only | | | Worker and wife ^a | Non-disabled widow only | Widowed mother or father and— | | | Worker only | | | Worker, wife, ^b and— | | Worker and spouse |
| | All | Men | Women | | | 1 child | 2 children | 3 or more children | All | Men | Women | 1 child | 2 or more children | |
| Average monthly family benefit (dollars) (cont.) | | | | | | | | | | | | | | |
| 1995 | 704.80 | 803.00 | 621.80 | 1,220.60 | 681.60 | 1,184.50 | 1,365.50 | 1,299.80 | 667.60 | 757.40 | 544.80 | 1,205.50 | 1,130.90 | 1,159.90 |
| 1996 | 730.00 | 831.10 | 644.20 | 1,262.10 | 708.70 | 1,222.50 | 1,450.60 | 1,347.20 | 690.60 | 785.30 | 566.00 | 1,245.90 | 1,148.50 | 1,200.60 |
| 1997 | 750.20 | 853.70 | 663.10 | 1,294.60 | 733.20 | 1,250.30 | 1,502.60 | 1,358.00 | 708.00 | 806.60 | 583.60 | 1,280.20 | 1,165.90 | 1,238.50 |
| 1998 | 765.10 | 870.50 | 676.40 | 1,317.70 | 750.90 | 1,277.00 | 1,537.70 | 1,393.20 | 720.00 | 820.20 | 597.40 | 1,300.40 | 1,189.40 | 1,261.90 |
| 1999 | 789.80 | 898.60 | 697.70 | 1,356.80 | 776.60 | 1,325.40 | 1,590.40 | 1,446.30 | 741.20 | 844.50 | 618.50 | 1,344.90 | 1,224.20 | 1,295.30 |
| 2000 | 830.10 | 945.90 | 730.30 | 1,419.90 | 812.30 | 1,387.90 | 1,675.40 | 1,513.20 | 773.60 | 880.70 | 649.40 | 1,394.20 | 1,274.30 | 1,355.50 |
| 2001 | 860.20 | 979.90 | 756.60 | 1,465.50 | 842.90 | 1,439.70 | 1,755.10 | 1,600.60 | 801.20 | 911.00 | 676.60 | 1,440.70 | 1,317.90 | 1,405.70 |
| 2002 | 881.30 | 1,003.80 | 774.60 | 1,494.20 | 863.40 | 1,473.20 | 1,812.10 | 1,664.50 | 820.50 | 931.90 | 696.40 | 1,468.10 | 1,352.50 | 1,449.20 |
| 2003 | 908.70 | 1,035.20 | 798.30 | 1,534.90 | 890.50 | 1,525.40 | 1,881.00 | 1,724.20 | 848.00 | 962.50 | 722.00 | 1,517.70 | 1,409.60 | 1,497.50 |

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1985–2003 are based on a 10 percent sample. Data for prior years are based on different sampling rates.

NOTE: . . . = not applicable.

a. Wife's entitlement based on age.

b. Wife's entitlement based on care of children.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 5.H2—Number, average primary insurance amount, and average monthly family benefit for selected family groups, December 2003

| Family group | Number ^a (thousands) | | Average primary insurance amount (dollars) | Average monthly family benefit (dollars) |
|---------------------------------------|---------------------------------|---------------|--|--|
| | Families | Beneficiaries | | |
| Retired-worker families | | | | |
| Worker only | 26,644 | 26,644 | 913.60 | 908.70 |
| Men | 12,420 | 12,420 | 1,144.50 | 1,035.20 |
| Full benefit | 3,764 | 3,764 | 1,173.90 | 1,213.60 |
| Reduced benefit | 8,656 | 8,656 | 1,131.70 | 957.60 |
| Women | 14,224 | 14,224 | 712.00 | 798.30 |
| Full benefit | 3,567 | 3,567 | 794.70 | 913.10 |
| Reduced benefit | 10,657 | 10,657 | 684.30 | 759.90 |
| Worker and wife | 2,468 | 4,936 | 1,158.60 | 1,534.90 |
| Full worker benefit | 842 | 1,684 | 1,208.60 | 1,772.90 |
| Reduced worker benefit | 1,626 | 3,252 | 1,132.80 | 1,411.70 |
| Worker and husband | 34 | 70 | 569.00 | 793.40 |
| Worker and children | 295 | 647 | 1,063.90 | 1,522.50 |
| Male worker ^b | 260 | 573 | 1,101.90 | 1,573.90 |
| Female worker ^c | 34 | 74 | 775.40 | 1,132.20 |
| Worker, wife, and children | 98 | 320 | 1,115.40 | 1,833.10 |
| Worker, wife, and 1 child | 80 | 240 | 1,124.40 | 1,841.40 |
| Full worker benefit | 24 | 73 | 1,151.60 | 2,039.50 |
| Reduced worker benefit | 56 | 167 | 1,112.70 | 1,755.40 |
| Worker, wife, and 2 or more children | 18 | 80 | 1,075.40 | 1,796.50 |
| Full worker benefit | 5 | 23 | 1,095.90 | 1,976.40 |
| Reduced worker benefit | 13 | 57 | 1,067.00 | 1,723.20 |
| Survivor families | | | | |
| Nondisabled widow(er) only | 4,327 | 4,327 | 1,049.80 | 888.70 |
| Full benefit | 1,813 | 1,813 | 1,050.00 | 991.20 |
| Reduced benefit | 2,513 | 2,513 | 1,049.60 | 814.80 |
| Nondisabled widow(er) and children | 93 | 194 | 961.10 | 1,537.80 |
| Full benefit | 57 | 117 | 942.40 | 1,568.20 |
| Reduced benefit | 37 | 77 | 989.60 | 1,491.40 |
| Disabled widow(er) only | 189 | 189 | 1,053.00 | 560.80 |
| Widowed mother or father and children | 184 | 494 | 1,040.60 | 1,672.00 |
| 1 child | 96 | 192 | 1,025.20 | 1,525.40 |
| 2 children | 61 | 182 | 1,082.90 | 1,881.00 |
| 3 or more children | 27 | 121 | 1,001.00 | 1,724.20 |
| Children only | 1,100 | 1,497 | 851.10 | 806.70 |
| 1 child | 814 | 814 | 854.10 | 638.50 |
| 2 children | 206 | 411 | 856.80 | 1,263.00 |
| 3 or more children | 80 | 272 | 806.00 | 1,341.80 |
| Parents | 2 | 2 | 1,017.50 | 823.10 |
| Disabled-worker families | | | | |
| Worker only | 4,832 | 4,832 | 851.40 | 848.00 |
| Men | 2,532 | 2,532 | 968.40 | 962.50 |
| Women | 2,301 | 2,301 | 722.70 | 722.00 |
| Worker and spouse ^d | 53 | 106 | 1,214.10 | 1,497.50 |
| Worker and children | 885 | 2,256 | 918.70 | 1,319.70 |
| Male worker | 549 | 1,410 | 978.30 | 1,413.20 |
| Female worker | 337 | 846 | 821.50 | 1,167.20 |
| Worker, wife, and children | 95 | 373 | 992.90 | 1,455.10 |
| 1 child | 40 | 119 | 1,026.40 | 1,517.70 |
| 2 or more children | 55 | 254 | 968.50 | 1,409.60 |
| Worker, husband, and children | 2 | 7 | 844.60 | 1,201.30 |

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.

- a. Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).
- b. Includes 183,100 families with reduced retired-worker benefits.
- c. Includes 34,300 families with reduced retired-worker benefits.
- d. Where the disabled worker's spouse is dually entitled as a retired worker, the benefit amount shown for the spouse represents the difference between the entitlement amount as a spouse and as a retired worker.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H3—Percentage distribution of retired-worker and disabled-worker families, by monthly benefit for selected family groups, December 2003

| Monthly family benefit ^a (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 | 12,419,980 | 14,223,950 | 2,467,820 | 79,910 | 18,050 | 2,531,520 | 2,300,690 | 39,780 | 54,780 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Less than 200.00 | 1.4 | 1.5 | 0.6 | 0.4 | 0.4 | 0.8 | 1.8 | 0.3 | 0.3 |
| 200.00–249.90 | 0.9 | 1.0 | 0.4 | 0.2 | 0.1 | 0.8 | 2.0 | 0.0 | 0.2 |
| 250.00–299.90 | 1.0 | 1.3 | 0.5 | 0.2 | 0.5 | 1.1 | 2.5 | 0.2 | 0.2 |
| 300.00–349.90 | 1.0 | 1.6 | 0.5 | 0.5 | 0.4 | 1.4 | 3.1 | 0.2 | 0.3 |
| 350.00–399.90 | 1.1 | 2.3 | 0.6 | 0.5 | 0.4 | 1.5 | 3.3 | 0.3 | 0.3 |
| 400.00–449.90 | 1.5 | 3.6 | 0.6 | 0.6 | 0.9 | 1.8 | 3.6 | 0.2 | 0.2 |
| 450.00–499.90 | 1.8 | 5.6 | 0.7 | 0.6 | 0.8 | 3.0 | 6.1 | 0.4 | 0.4 |
| 500.00–549.90 | 2.1 | 7.8 | 0.7 | 0.8 | 0.5 | 4.0 | 8.0 | 0.8 | 1.3 |
| 550.00–599.90 | 2.2 | 7.6 | 0.9 | 0.6 | 0.8 | 4.7 | 8.5 | 1.4 | 2.0 |
| 600.00–649.90 | 2.3 | 6.6 | 1.0 | 1.0 | 1.2 | 4.8 | 7.9 | 1.3 | 2.0 |
| 650.00–699.90 | 2.5 | 6.0 | 1.2 | 1.3 | 1.4 | 4.8 | 7.2 | 1.3 | 1.9 |
| 700.00–749.90 | 2.8 | 5.3 | 1.3 | 1.3 | 2.1 | 4.8 | 6.4 | 1.7 | 2.4 |
| 750.00–799.90 | 3.1 | 4.8 | 1.4 | 1.7 | 2.4 | 4.7 | 5.8 | 1.8 | 2.3 |
| 800.00–849.90 | 3.6 | 4.7 | 1.4 | 1.9 | 2.2 | 4.6 | 5.0 | 2.4 | 2.8 |
| 850.00–899.90 | 4.1 | 4.6 | 1.5 | 1.3 | 2.1 | 4.5 | 4.4 | 2.4 | 2.5 |
| 900.00–949.90 | 4.8 | 4.6 | 1.5 | 1.3 | 1.9 | 4.4 | 3.8 | 2.1 | 2.6 |
| 950.00–999.90 | 5.6 | 4.5 | 1.5 | 1.2 | 1.8 | 4.2 | 3.3 | 2.5 | 2.9 |
| 1,000.00–1,049.90 | 5.9 | 4.3 | 1.7 | 1.1 | 1.6 | 4.0 | 2.8 | 2.8 | 3.3 |
| 1,050.00–1,099.90 | 7.2 | 4.0 | 1.8 | 1.2 | 1.7 | 3.8 | 2.4 | 3.2 | 4.0 |
| 1,100.00–1,149.90 | 6.7 | 3.4 | 1.9 | 1.1 | 1.6 | 3.6 | 2.0 | 3.0 | 4.5 |
| 1,150.00–1,199.90 | 5.9 | 2.8 | 2.1 | 1.3 | 1.1 | 3.4 | 1.7 | 3.4 | 4.1 |
| 1,200.00–1,249.90 | 5.5 | 2.4 | 2.3 | 1.3 | 1.5 | 3.2 | 1.4 | 3.8 | 4.1 |
| 1,250.00–1,299.90 | 5.0 | 2.1 | 2.5 | 1.2 | 1.4 | 3.3 | 1.2 | 3.8 | 4.5 |
| 1,300.00–1,349.90 | 4.7 | 1.8 | 2.8 | 1.2 | 1.1 | 3.8 | 1.3 | 3.6 | 3.5 |
| 1,350.00–1,399.90 | 4.0 | 1.4 | 3.3 | 1.4 | 1.1 | 3.5 | 1.1 | 3.5 | 3.7 |
| 1,400.00–1,449.90 | 3.0 | 1.0 | 3.9 | 1.4 | 2.2 | 3.2 | 0.8 | 2.9 | 3.3 |
| 1,450.00–1,499.90 | 2.3 | 0.8 | 4.1 | 1.2 | 1.6 | 2.9 | 0.7 | 3.6 | 2.9 |
| 1,500.00–1,549.90 | 1.8 | 0.6 | 4.4 | 1.3 | 2.4 | 2.5 | 0.6 | 3.0 | 2.7 |
| 1,550.00–1,599.90 | 1.4 | 0.4 | 5.3 | 1.8 | 1.4 | 2.1 | 0.4 | 2.6 | 2.6 |
| 1,600.00–1,649.90 | ^b 4.8 | ^b 1.2 | 5.5 | 2.0 | 1.8 | ^b 4.9 | ^b 0.7 | 2.5 | 2.5 |
| 1,650.00–1,699.90 | ... | ... | 4.9 | 2.3 | 1.4 | ... | ... | 2.5 | 2.0 |
| 1,700.00–1,749.90 | ... | ... | 4.4 | 2.4 | 1.7 | ... | ... | 2.4 | 2.0 |
| 1,750.00–1,799.90 | ... | ... | 4.0 | 3.2 | 2.5 | ... | ... | 1.9 | 1.8 |
| 1,800.00–1,849.90 | ... | ... | 3.7 | 2.9 | 2.9 | ... | ... | 2.6 | 1.7 |
| 1,850.00–1,899.90 | ... | ... | 3.3 | 3.0 | 2.4 | ... | ... | 2.2 | 1.6 |
| 1,900.00–1,949.90 | ... | ... | 3.0 | 3.4 | 2.7 | ... | ... | 2.8 | 1.9 |
| 1,950.00–1,999.90 | ... | ... | 2.6 | 3.9 | 2.9 | ... | ... | 2.6 | 1.9 |
| 2,000.00–2,049.90 | ... | ... | 2.3 | 4.2 | 2.7 | ... | ... | 2.4 | 1.8 |
| 2,050.00–2,099.90 | ... | ... | 1.9 | 3.6 | 3.1 | ... | ... | 2.5 | 1.6 |
| 2,100.00–2,149.90 | ... | ... | 1.7 | 4.1 | 2.4 | ... | ... | 2.2 | 1.0 |
| 2,150.00–2,199.90 | ... | ... | 1.4 | 3.6 | 3.5 | ... | ... | 1.6 | 1.5 |
| 2,200.00–2,249.90 | ... | ... | 1.2 | 3.3 | 2.9 | ... | ... | 1.9 | 1.4 |

(Continued)

Table 5.H3—Percentage distribution of retired-worker and disabled-worker families, by monthly benefit for selected family groups, December 2003—Continued

| Monthly family benefit ^a (dollars) | Retired worker only | | Retired worker and wife | Retired worker, wife, and— | | Disabled worker only | | Disabled worker, wife, and— | |
|---|---------------------|--------|-------------------------|----------------------------|--------------------|----------------------|--------|-----------------------------|--------------------|
| | Men | Women | | 1 child | 2 or more children | Men | Women | 1 child | 2 or more children |
| 2,250.00–2,299.90 | ... | ... | 1.1 | 2.8 | 2.2 | ... | ... | 1.9 | 1.4 |
| 2,300.00–2,349.90 | ... | ... | 0.9 | 2.5 | 1.9 | ... | ... | 1.4 | 1.0 |
| 2,350.00–2,399.90 | ... | ... | 0.8 | 2.8 | 2.1 | ... | ... | 1.5 | 1.4 |
| 2,400.00–2,449.90 | ... | ... | 0.7 | 2.6 | 1.4 | ... | ... | 1.0 | 0.9 |
| 2,450.00–2,499.90 | ... | ... | 0.7 | 2.1 | 1.9 | ... | ... | 1.1 | 0.7 |
| 2,500.00–2,549.90 | ... | ... | 0.5 | 1.8 | 2.5 | ... | ... | 0.9 | 0.6 |
| 2,550.00–2,599.90 | ... | ... | 0.5 | 1.8 | 1.6 | ... | ... | 0.8 | 0.7 |
| 2,600.00–2,649.90 | ... | ... | 0.4 | 1.6 | 2.0 | ... | ... | 0.7 | 0.4 |
| 2,650.00–2,699.90 | ... | ... | 0.3 | 1.4 | 1.2 | ... | ... | 0.2 | 0.4 |
| 2,700.00 or more | ... | ... | 1.6 | 7.8 | 11.5 | ... | ... | 2.0 | 2.1 |
| Average monthly family benefit (dollars) | 1,035.20 | 798.30 | 1,534.90 | 1,841.40 | 1,755.40 | 962.50 | 722.00 | 1,517.70 | 1,409.60 |

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

NOTE: ... = not applicable.

- a. Cases involving actuarial reduction may be represented in all benefit intervals for which values are shown.
b. \$1,600 or more.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H4—Percentage distribution of survivor families, by monthly benefit for selected family groups, December 2003

| Monthly family benefit (dollars) | Widowed mother or father and— | | | Children only | | | Widow only | |
|----------------------------------|-------------------------------|------------|--------------------|------------------|------------|--------------------|------------------|------------------|
| | 1 child | 2 children | 3 or more children | 1 child | 2 children | 3 or more children | Nondisabled | Disabled |
| Total | | | | | | | | |
| Number | 95,990 | 60,530 | 27,280 | 813,870 | 205,710 | 80,400 | 4,285,760 | 183,130 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Less than 200.00 | 0.1 | 0.0 | 0.1 | 3.2 | 1.1 | 1.4 | 0.7 | 9.6 |
| 200.00–249.90 | 0.3 | 0.2 | 0.4 | 1.9 | 0.8 | 1.2 | 0.7 | 4.6 |
| 250.00–299.90 | 0.3 | 0.2 | 0.4 | 2.2 | 1.0 | 1.6 | 1.2 | 4.7 |
| 300.00–349.90 | 0.4 | 0.4 | 0.5 | 6.2 | 1.4 | 1.9 | 1.8 | 5.2 |
| 350.00–399.90 | 0.5 | 0.4 | 0.9 | 6.2 | 1.4 | 2.1 | 1.9 | 6.7 |
| 400.00–449.90 | 0.7 | 0.4 | 0.7 | 7.2 | 1.5 | 1.9 | 2.2 | 6.7 |
| 450.00–499.90 | 0.6 | 0.6 | 0.6 | 7.3 | 1.5 | 1.9 | 2.6 | 7.0 |
| 500.00–549.90 | 0.7 | 0.6 | 0.7 | 7.1 | 2.1 | 2.3 | 3.0 | 6.6 |
| 550.00–599.90 | 0.8 | 0.6 | 1.3 | 7.1 | 1.6 | 1.9 | 3.4 | 6.1 |
| 600.00–649.90 | 0.8 | 0.7 | 0.7 | 7.1 | 1.6 | 1.6 | 4.1 | 5.6 |
| 650.00–699.90 | 0.8 | 0.8 | 1.0 | 7.1 | 1.9 | 1.7 | 4.8 | 5.3 |
| 700.00–749.90 | 1.8 | 1.1 | 1.4 | 6.0 | 2.9 | 3.1 | 5.4 | 5.1 |
| 750.00–799.90 | 2.1 | 1.5 | 3.0 | 5.4 | 3.1 | 3.4 | 5.9 | 4.4 |
| 800.00–849.90 | 2.3 | 1.8 | 2.7 | 4.5 | 3.8 | 3.9 | 6.2 | 4.0 |
| 850.00–899.90 | 2.5 | 2.2 | 3.3 | 3.9 | 3.9 | 3.8 | 6.9 | 3.5 |
| 900.00–949.90 | 2.7 | 2.7 | 3.6 | 3.5 | 3.7 | 4.1 | 7.4 | 3.4 |
| 950.00–999.90 | 2.8 | 2.0 | 3.4 | 3.3 | 4.0 | 3.9 | 7.4 | 3.6 |
| 1,000.00–1,049.90 | 2.8 | 1.8 | 3.2 | 3.1 | 3.7 | 3.3 | 6.5 | 2.7 |
| 1,050.00–1,099.90 | 2.8 | 2.0 | 2.4 | 2.2 | 3.8 | 2.9 | 5.5 | 2.1 |
| 1,100.00–1,149.90 | 2.8 | 1.6 | 1.7 | ^a 5.5 | 3.4 | 2.5 | 4.7 | ^a 3.1 |
| 1,150.00–1,199.90 | 2.9 | 1.3 | 1.2 | ... | 3.4 | 2.0 | 3.6 | ... |
| 1,200.00–1,249.90 | 3.3 | 1.6 | 1.8 | ... | 3.1 | 1.7 | 2.9 | ... |
| 1,250.00–1,299.90 | 3.0 | 1.7 | 1.9 | ... | 3.3 | 1.9 | 2.5 | ... |
| 1,300.00–1,349.90 | 3.1 | 1.6 | 1.9 | ... | 3.1 | 1.6 | 2.1 | ... |
| 1,350.00–1,399.90 | 3.2 | 1.3 | 1.8 | ... | 2.9 | 1.6 | 1.6 | ... |
| 1,400.00–1,449.90 | 3.0 | 2.0 | 1.6 | ... | 2.6 | 1.8 | 1.1 | ... |
| 1,450.00–1,499.90 | 3.2 | 1.8 | 1.1 | ... | 2.4 | 1.7 | 0.8 | ... |
| 1,500.00–1,549.90 | 2.8 | 1.9 | 1.9 | ... | 2.4 | 1.5 | ^b 2.7 | ... |
| 1,550.00–1,599.90 | 2.8 | 1.8 | 2.1 | ... | 2.3 | 1.5 | ... | ... |
| 1,600.00–1,649.90 | 2.9 | 1.9 | 1.8 | ... | 1.8 | 1.4 | ... | ... |
| 1,650.00–1,699.90 | 2.5 | 1.6 | 1.6 | ... | 1.8 | 1.7 | ... | ... |
| 1,700.00–1,749.90 | 3.0 | 2.0 | 1.3 | ... | 1.9 | 1.5 | ... | ... |
| 1,750.00–1,799.90 | 2.2 | 1.9 | 1.5 | ... | 1.5 | 1.5 | ... | ... |
| 1,800.00–1,849.90 | 2.5 | 2.2 | 2.0 | ... | 1.5 | 1.7 | ... | ... |
| 1,850.00–1,899.90 | 2.5 | 2.5 | 2.1 | ... | 1.3 | 1.5 | ... | ... |
| 1,900.00–1,949.90 | 2.5 | 2.3 | 1.8 | ... | 1.4 | 1.6 | ... | ... |
| 1,950.00–1,999.90 | 2.8 | 2.5 | 1.9 | ... | 1.6 | 1.5 | ... | ... |
| 2,000.00–2,049.90 | 2.2 | 2.6 | 1.7 | ... | 1.5 | 1.6 | ... | ... |
| 2,050.00–2,099.90 | 2.3 | 2.4 | 2.3 | ... | 1.3 | 1.6 | ... | ... |
| 2,100.00–2,149.90 | 2.2 | 2.5 | 2.1 | ... | 1.2 | 1.7 | ... | ... |
| 2,150.00–2,199.90 | 1.9 | 2.6 | 2.1 | ... | 1.1 | 1.4 | ... | ... |
| 2,200.00–2,249.90 | 1.8 | 2.3 | 1.9 | ... | 1.1 | 1.5 | ... | ... |

(Continued)

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H4—Percentage distribution of survivor families, by monthly benefit for selected family groups, December 2003—Continued

| Monthly family benefit (dollars) | Widowed mother or father and— | | | Children only | | | Widow only | |
|--|-------------------------------|------------|--------------------|---------------|------------|--------------------|-------------|----------|
| | 1 child | 2 children | 3 or more children | 1 child | 2 children | 3 or more children | Nondisabled | Disabled |
| 2,250.00–2,299.90 | 1.9 | 2.5 | 1.7 | ... | 1.1 | 1.1 | ... | ... |
| 2,300.00–2,349.90 | 2.0 | 2.6 | 1.8 | ... | 1.0 | 1.3 | ... | ... |
| 2,350.00–2,399.90 | 1.3 | 2.7 | 1.6 | ... | 1.0 | 1.0 | ... | ... |
| 2,400.00–2,449.90 | 1.4 | 1.9 | 1.6 | ... | 0.9 | 1.0 | ... | ... |
| 2,450.00–2,499.90 | 1.2 | 2.0 | 1.5 | ... | 0.8 | 1.0 | ... | ... |
| 2,500.00–2,549.90 | 0.9 | 1.9 | 1.4 | ... | 0.6 | 0.9 | ... | ... |
| 2,550.00–2,599.90 | 0.7 | 1.8 | 1.4 | ... | 0.4 | 0.7 | ... | ... |
| 2,600.00–2,649.90 | 0.6 | 1.3 | 1.1 | ... | 0.3 | 0.6 | ... | ... |
| 2,650.00–2,699.90 | 0.6 | 1.6 | 1.1 | ... | 0.3 | 0.6 | ... | ... |
| 2,700.00 or more | 2.1 | 15.8 | 14.9 | ... | 1.0 | 5.8 | ... | ... |
| Average monthly family benefit (dollars) | 1,525.40 | 1,881.00 | 1,724.20 | 638.50 | 1,263.00 | 1,341.80 | 890.50 | 566.10 |

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

NOTE: ... = not applicable.

- a. \$1,100 or more.
- b. \$1,500 or more.

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 state or other area and program, 2003 (in millions of dollars)

| State or area | Total, OASDI | Retirement | Survivors | Disability |
|--------------------------|--------------|------------|-----------|------------|
| All areas | 470,592 | 314,052 | 85,634 | 70,906 |
| Alabama | 8,237 | 4,860 | 1,638 | 1,740 |
| Alaska | 574 | 364 | 107 | 104 |
| Arizona | 8,682 | 5,999 | 1,373 | 1,310 |
| Arkansas | 4,951 | 3,018 | 906 | 1,026 |
| California | 43,857 | 30,115 | 7,576 | 6,166 |
| Colorado | 5,507 | 3,717 | 989 | 801 |
| Connecticut | 6,418 | 4,686 | 981 | 751 |
| Delaware | 1,518 | 1,037 | 250 | 231 |
| District of Columbia | 633 | 423 | 113 | 96 |
| Florida | 33,305 | 23,685 | 5,290 | 4,330 |
| Georgia | 11,315 | 7,075 | 2,103 | 2,136 |
| Hawaii | 1,938 | 1,450 | 281 | 207 |
| Idaho | 2,060 | 1,404 | 357 | 299 |
| Illinois | 19,741 | 13,456 | 3,763 | 2,522 |
| Indiana | 10,768 | 7,219 | 2,002 | 1,547 |
| Iowa | 5,490 | 3,803 | 1,041 | 646 |
| Kansas | 4,560 | 3,151 | 853 | 557 |
| Kentucky | 7,242 | 4,057 | 1,459 | 1,726 |
| Louisiana | 6,801 | 3,814 | 1,715 | 1,273 |
| Maine | 2,427 | 1,556 | 413 | 458 |
| Maryland | 7,712 | 5,243 | 1,447 | 1,023 |
| Massachusetts | 10,807 | 7,363 | 1,770 | 1,674 |
| Michigan | 18,236 | 12,010 | 3,442 | 2,784 |
| Minnesota | 7,708 | 5,399 | 1,372 | 937 |
| Mississippi | 4,825 | 2,757 | 944 | 1,124 |
| Missouri | 10,209 | 6,657 | 1,846 | 1,706 |
| Montana | 1,583 | 1,069 | 294 | 220 |
| Nebraska | 2,847 | 1,979 | 524 | 344 |
| Nevada | 3,349 | 2,349 | 485 | 514 |
| New Hampshire | 2,185 | 1,502 | 342 | 341 |
| New Jersey | 15,223 | 10,860 | 2,488 | 1,875 |
| New Mexico | 2,708 | 1,765 | 497 | 445 |
| New York | 32,187 | 22,188 | 5,273 | 4,726 |
| North Carolina | 13,953 | 9,071 | 2,232 | 2,649 |
| North Dakota | 1,082 | 719 | 244 | 118 |
| Ohio | 19,853 | 13,046 | 4,200 | 2,607 |
| Oklahoma | 5,945 | 3,839 | 1,177 | 928 |
| Oregon | 6,093 | 4,243 | 1,030 | 819 |
| Pennsylvania | 24,919 | 16,941 | 4,804 | 3,174 |
| Rhode Island | 1,945 | 1,346 | 288 | 310 |
| South Carolina | 7,091 | 4,496 | 1,193 | 1,401 |
| South Dakota | 1,282 | 873 | 260 | 149 |
| Tennessee | 10,097 | 6,290 | 1,905 | 1,902 |
| Texas | 27,068 | 17,506 | 5,738 | 3,824 |
| Utah | 2,561 | 1,791 | 460 | 311 |
| Vermont | 1,066 | 723 | 174 | 170 |
| Virginia | 10,759 | 7,033 | 1,930 | 1,796 |
| Washington | 9,305 | 6,457 | 1,541 | 1,307 |
| West Virginia | 4,012 | 2,197 | 894 | 921 |
| Wisconsin | 9,563 | 6,751 | 1,653 | 1,159 |
| Wyoming | 809 | 566 | 135 | 108 |
| Outlying areas | | | | |
| American Samoa | 34 | 11 | 11 | 12 |
| Guam | 83 | 49 | 21 | 13 |
| Northern Mariana Islands | 10 | 6 | 4 | 1 |
| Puerto Rico | 4,711 | 2,339 | 936 | 1,436 |
| Virgin Islands | 127 | 91 | 21 | 16 |
| Foreign countries | 2,575 | 1,610 | 836 | 129 |

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 Cherice N. Jefferies (410) 965-5520.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J2—Number, by state or other area, program, and type of benefit, December 2003

| State or area | Total ^a | Retirement | | | Survivors | | Disability | | |
|------------------------|--------------------|-----------------|-----------|----------|------------------------|-----------|------------------|---------|-----------|
| | | Retired workers | Spouses | Children | Widow(er)s and parents | Children | Disabled workers | Spouses | Children |
| All areas ^b | 47,053,140 | 29,547,530 | 2,622,130 | 480,490 | 4,898,040 | 1,906,680 | 5,867,460 | 151,500 | 1,579,310 |
| Alabama | 869,760 | 477,940 | 43,920 | 9,640 | 100,330 | 42,380 | 148,620 | 4,180 | 42,750 |
| Alaska | 61,070 | 35,650 | 2,630 | 1,100 | 5,250 | 4,620 | 8,810 | 220 | 2,790 |
| Arizona | 858,500 | 558,440 | 47,700 | 7,700 | 76,460 | 31,240 | 105,940 | 2,320 | 28,700 |
| Arkansas | 537,180 | 306,640 | 27,100 | 5,230 | 58,740 | 23,250 | 90,170 | 2,110 | 23,940 |
| California | 4,358,850 | 2,806,590 | 274,550 | 53,320 | 413,310 | 170,740 | 504,560 | 11,790 | 123,990 |
| Colorado | 559,130 | 356,610 | 35,530 | 4,780 | 55,650 | 21,500 | 66,740 | 1,410 | 16,910 |
| Connecticut | 583,220 | 406,150 | 24,770 | 5,400 | 49,720 | 19,870 | 59,530 | 1,010 | 16,770 |
| Delaware | 144,530 | 93,970 | 6,890 | 1,480 | 13,380 | 5,260 | 18,350 | 290 | 4,910 |
| District of Columbia | 72,330 | 47,590 | 2,480 | 790 | 6,950 | 4,380 | 8,850 | 60 | 1,230 |
| Florida | 3,333,390 | 2,255,400 | 174,130 | 32,180 | 301,370 | 110,250 | 359,840 | 7,900 | 92,320 |
| Georgia | 1,169,720 | 691,420 | 51,320 | 11,540 | 119,840 | 63,240 | 180,490 | 3,960 | 47,910 |
| Hawaii | 195,430 | 139,300 | 9,160 | 2,630 | 16,090 | 6,440 | 16,790 | 460 | 4,560 |
| Idaho | 211,670 | 135,300 | 13,400 | 1,750 | 20,020 | 8,210 | 25,690 | 660 | 6,640 |
| Illinois | 1,872,890 | 1,213,840 | 98,760 | 19,340 | 200,730 | 79,670 | 200,490 | 4,090 | 55,970 |
| Indiana | 1,025,720 | 648,910 | 52,770 | 8,960 | 107,680 | 41,660 | 126,820 | 2,840 | 36,080 |
| Iowa | 544,030 | 356,440 | 34,980 | 3,880 | 61,330 | 17,150 | 55,450 | 1,180 | 13,620 |
| Kansas | 443,830 | 289,600 | 25,490 | 3,330 | 47,200 | 16,240 | 48,000 | 740 | 13,230 |
| Kentucky | 769,060 | 400,290 | 44,730 | 6,850 | 94,060 | 32,130 | 144,060 | 6,170 | 40,770 |
| Louisiana | 731,080 | 373,300 | 54,020 | 9,870 | 105,980 | 43,570 | 103,980 | 5,230 | 35,130 |
| Maine | 262,600 | 158,990 | 13,000 | 2,490 | 25,540 | 8,040 | 41,390 | 1,030 | 12,120 |
| Maryland | 752,770 | 493,610 | 35,420 | 7,240 | 76,670 | 37,440 | 81,690 | 1,140 | 19,560 |
| Massachusetts | 1,064,340 | 693,520 | 46,680 | 10,180 | 98,250 | 34,600 | 140,000 | 2,180 | 38,930 |
| Michigan | 1,694,480 | 1,045,410 | 96,260 | 17,380 | 182,950 | 71,140 | 215,210 | 5,140 | 60,990 |
| Minnesota | 764,810 | 509,800 | 44,910 | 6,240 | 77,820 | 25,590 | 80,110 | 1,010 | 19,330 |
| Mississippi | 537,070 | 284,330 | 22,390 | 7,320 | 58,280 | 31,690 | 98,230 | 3,110 | 31,720 |
| Missouri | 1,034,170 | 635,810 | 53,070 | 9,030 | 105,410 | 43,080 | 144,970 | 3,040 | 39,760 |
| Montana | 163,720 | 104,160 | 10,470 | 1,640 | 17,140 | 6,400 | 18,770 | 550 | 4,590 |
| Nebraska | 287,910 | 188,550 | 18,190 | 2,290 | 30,460 | 9,680 | 30,090 | 430 | 8,220 |
| Nevada | 329,620 | 223,790 | 14,780 | 3,300 | 25,910 | 11,060 | 40,060 | 540 | 10,180 |
| New Hampshire | 213,520 | 140,150 | 8,710 | 1,720 | 17,950 | 7,680 | 28,010 | 430 | 8,870 |
| New Jersey | 1,366,270 | 937,110 | 56,060 | 13,180 | 127,530 | 49,740 | 141,810 | 3,010 | 37,830 |
| New Mexico | 295,640 | 176,090 | 20,360 | 3,670 | 29,880 | 14,800 | 38,530 | 1,360 | 10,950 |
| New York | 3,032,710 | 1,980,420 | 141,910 | 35,820 | 283,660 | 111,270 | 367,160 | 9,690 | 102,780 |
| North Carolina | 1,435,850 | 889,780 | 55,390 | 11,270 | 132,720 | 59,820 | 225,420 | 4,200 | 57,250 |
| North Dakota | 114,220 | 71,190 | 9,500 | 760 | 15,860 | 3,720 | 10,410 | 270 | 2,510 |
| Ohio | 1,937,110 | 1,190,200 | 133,310 | 17,610 | 241,580 | 74,010 | 218,660 | 5,090 | 56,650 |
| Oklahoma | 614,530 | 376,500 | 34,580 | 5,650 | 69,490 | 28,160 | 78,980 | 2,530 | 18,640 |
| Oregon | 597,950 | 396,470 | 33,670 | 5,460 | 57,570 | 19,420 | 69,030 | 1,720 | 14,610 |
| Pennsylvania | 2,387,770 | 1,549,580 | 130,010 | 19,110 | 272,560 | 82,330 | 259,270 | 6,830 | 68,080 |
| Rhode Island | 191,960 | 128,890 | 6,340 | 1,450 | 15,630 | 6,290 | 26,200 | 490 | 6,670 |
| South Carolina | 733,250 | 441,090 | 28,920 | 6,700 | 70,020 | 35,320 | 117,630 | 2,330 | 31,240 |
| South Dakota | 138,570 | 88,800 | 9,980 | 1,060 | 15,770 | 5,890 | 13,220 | 220 | 3,630 |
| Tennessee | 1,047,700 | 612,120 | 52,220 | 9,440 | 114,100 | 48,420 | 163,300 | 4,780 | 43,320 |
| Texas | 2,794,350 | 1,673,450 | 193,130 | 32,170 | 335,460 | 138,570 | 320,980 | 11,250 | 89,340 |
| Utah | 256,610 | 166,430 | 17,080 | 2,780 | 22,720 | 13,260 | 25,670 | 470 | 8,200 |
| Vermont | 108,900 | 69,170 | 5,620 | 1,190 | 10,150 | 3,550 | 14,550 | 350 | 4,320 |
| Virginia | 1,092,310 | 678,480 | 55,550 | 9,300 | 112,710 | 44,750 | 147,530 | 3,980 | 40,010 |
| Washington | 891,320 | 584,350 | 52,170 | 7,940 | 82,860 | 30,930 | 107,660 | 1,930 | 23,480 |
| West Virginia | 403,370 | 204,130 | 28,170 | 3,890 | 55,630 | 16,430 | 72,720 | 4,140 | 18,260 |
| Wisconsin | 924,150 | 622,330 | 48,840 | 7,720 | 91,290 | 30,870 | 96,780 | 1,390 | 24,930 |
| Wyoming | 80,650 | 53,630 | 4,560 | 480 | 7,180 | 3,390 | 8,760 | 240 | 2,410 |

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J2—Number, by state or other area, program, and type of benefit, December 2003—Continued

| State or area | Total ^a | Retirement | | | Survivors | | Disability | | |
|--------------------------|--------------------|-----------------|---------|----------|------------------------|----------|------------------|---------|----------|
| | | Retired workers | Spouses | Children | Widow(er)s and parents | Children | Disabled workers | Spouses | Children |
| Outlying areas | | | | | | | | | |
| American Samoa | 5,890 | 1,580 | 200 | 390 | 640 | 980 | 1,230 | 70 | 800 |
| Guam | 12,290 | 6,350 | 1,110 | 600 | 1,150 | 1,390 | 1,110 | 110 | 470 |
| Northern Mariana Islands | 1,990 | 900 | 90 | 300 | 230 | 330 | 120 | 0 | 20 |
| Puerto Rico | 698,010 | 317,870 | 54,440 | 15,440 | 81,220 | 38,540 | 134,990 | 8,980 | 46,530 |
| Virgin Islands | 15,070 | 9,760 | 960 | 500 | 1,200 | 880 | 1,210 | 80 | 480 |
| Foreign countries | 423,010 | 246,890 | 59,210 | 7,780 | 78,310 | 14,730 | 12,290 | 740 | 3,060 |

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

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

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 benefits for beneficiaries aged 65 or older, by state or other area and sex, December 2003

| State or area | Number | | | Total monthly benefits (thousands of dollars) | | |
|------------------------|------------|------------|------------|---|------------|------------|
| | Total | Men | Women | Total | Men | Women |
| All areas ^a | 33,453,150 | 14,035,270 | 19,417,880 | 29,795,196 | 14,552,749 | 15,242,446 |
| Alabama | 552,640 | 224,690 | 327,950 | 465,277 | 222,999 | 242,278 |
| Alaska | 37,620 | 18,160 | 19,460 | 32,700 | 18,049 | 14,652 |
| Arizona | 610,910 | 270,670 | 340,240 | 555,713 | 285,034 | 270,679 |
| Arkansas | 348,900 | 144,480 | 204,420 | 286,195 | 138,629 | 147,566 |
| California | 3,184,770 | 1,382,640 | 1,802,130 | 2,854,452 | 1,422,210 | 1,432,242 |
| Colorado | 404,650 | 175,020 | 229,630 | 351,839 | 178,688 | 173,152 |
| Connecticut | 446,430 | 182,720 | 263,710 | 441,982 | 211,327 | 230,655 |
| Delaware | 102,530 | 43,630 | 58,900 | 96,494 | 47,860 | 48,634 |
| District of Columbia | 53,370 | 21,010 | 32,360 | 40,949 | 18,348 | 22,601 |
| Florida | 2,476,840 | 1,080,230 | 1,396,610 | 2,217,135 | 1,117,854 | 1,099,281 |
| Georgia | 762,280 | 309,310 | 452,970 | 659,485 | 315,450 | 344,034 |
| Hawaii | 150,170 | 65,070 | 85,100 | 132,466 | 64,522 | 67,944 |
| Idaho | 150,130 | 66,710 | 83,420 | 130,887 | 68,218 | 62,669 |
| Illinois | 1,375,500 | 563,940 | 811,560 | 1,287,367 | 613,778 | 673,589 |
| Indiana | 725,910 | 296,340 | 429,570 | 680,529 | 325,387 | 355,142 |
| Iowa | 413,370 | 171,390 | 241,980 | 366,260 | 178,905 | 187,355 |
| Kansas | 332,020 | 136,760 | 195,260 | 304,277 | 147,067 | 157,209 |
| Kentucky | 479,270 | 197,490 | 281,780 | 396,257 | 191,912 | 204,345 |
| Louisiana | 473,370 | 196,530 | 276,840 | 385,031 | 190,607 | 194,424 |
| Maine | 179,260 | 76,740 | 102,520 | 148,490 | 74,030 | 74,460 |
| Maryland | 549,630 | 224,780 | 324,850 | 496,869 | 235,112 | 261,756 |
| Massachusetts | 781,030 | 315,680 | 465,350 | 708,270 | 333,812 | 374,458 |
| Michigan | 1,183,940 | 493,250 | 690,690 | 1,131,459 | 553,867 | 577,592 |
| Minnesota | 573,340 | 240,070 | 333,270 | 508,006 | 250,088 | 257,918 |
| Mississippi | 323,690 | 131,490 | 192,200 | 262,163 | 125,273 | 136,890 |
| Missouri | 713,370 | 297,060 | 416,310 | 629,653 | 306,482 | 323,171 |
| Montana | 117,010 | 51,860 | 65,150 | 100,344 | 51,656 | 48,688 |
| Nebraska | 218,710 | 90,250 | 128,460 | 191,344 | 92,792 | 98,552 |
| Nevada | 233,590 | 110,310 | 123,280 | 212,916 | 114,120 | 98,796 |
| New Hampshire | 151,530 | 64,820 | 86,710 | 139,964 | 69,983 | 69,980 |
| New Jersey | 1,032,790 | 419,380 | 613,410 | 1,027,771 | 484,857 | 542,914 |
| New Mexico | 201,630 | 89,420 | 112,210 | 165,838 | 85,989 | 79,848 |
| New York | 2,193,500 | 893,030 | 1,300,470 | 2,082,883 | 976,544 | 1,106,339 |
| North Carolina | 962,130 | 391,940 | 570,190 | 836,674 | 398,609 | 438,065 |
| North Dakota | 88,450 | 36,680 | 51,770 | 72,398 | 35,523 | 36,875 |
| Ohio | 1,416,740 | 583,130 | 833,610 | 1,275,697 | 621,614 | 654,083 |
| Oklahoma | 427,820 | 179,140 | 248,680 | 365,437 | 177,506 | 187,930 |
| Oregon | 435,520 | 188,270 | 247,250 | 393,993 | 197,565 | 196,428 |
| Pennsylvania | 1,777,910 | 715,880 | 1,062,030 | 1,635,595 | 774,266 | 861,330 |
| Rhode Island | 140,230 | 56,240 | 83,990 | 127,358 | 59,115 | 68,243 |
| South Carolina | 476,530 | 195,110 | 281,420 | 413,300 | 199,428 | 213,873 |
| South Dakota | 104,610 | 44,010 | 60,600 | 84,837 | 41,919 | 42,917 |
| Tennessee | 689,010 | 280,800 | 408,210 | 593,898 | 285,026 | 308,872 |
| Texas | 1,960,750 | 842,480 | 1,118,270 | 1,688,298 | 852,709 | 835,589 |
| Utah | 185,460 | 82,110 | 103,350 | 166,893 | 87,393 | 79,500 |
| Vermont | 76,300 | 32,600 | 43,700 | 67,426 | 33,602 | 33,824 |
| Virginia | 760,250 | 314,490 | 445,760 | 663,553 | 321,047 | 342,506 |
| Washington | 646,790 | 279,630 | 367,160 | 601,290 | 302,708 | 298,582 |
| West Virginia | 256,010 | 105,330 | 150,680 | 219,860 | 106,365 | 113,495 |
| Wisconsin | 689,050 | 290,280 | 398,770 | 630,309 | 311,354 | 318,956 |
| Wyoming | 58,300 | 26,840 | 31,460 | 52,092 | 28,079 | 24,013 |

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J3—Number and total monthly benefits for beneficiaries aged 65 or older, by state or other area and sex, December 2003—Continued

| State or area | Number | | | Total monthly benefits (thousands of dollars) | | |
|--------------------------|---------|---------|---------|---|---------|---------|
| | Total | Men | Women | Total | Men | Women |
| Outlying areas | | | | | | |
| American Samoa | 1,900 | 960 | 940 | 1,013 | 585 | 427 |
| Guam | 7,070 | 3,680 | 3,390 | 4,304 | 2,551 | 1,754 |
| Northern Mariana Islands | 880 | 520 | 360 | 438 | 290 | 148 |
| Puerto Rico | 392,190 | 176,160 | 216,030 | 222,552 | 114,974 | 107,578 |
| Virgin Islands | 10,180 | 4,700 | 5,480 | 7,711 | 4,069 | 3,642 |
| Foreign countries | 352,340 | 157,520 | 194,820 | 176,549 | 83,300 | 93,249 |

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

a. Includes beneficiaries with unknown state code.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J4—Total monthly benefits, by state or other area, program, and type of benefit, December 2003
(in thousands of dollars)**

| State or area | Total ^a | Retirement | | | Survivors | | Disability | | |
|------------------------|--------------------|-----------------|-----------|----------|------------------------|-----------|------------------|---------|----------|
| | | Retired workers | Spouses | Children | Widow(er)s and parents | Children | Disabled workers | Spouses | Children |
| All areas ^b | 39,554,773 | 27,245,638 | 1,215,594 | 214,081 | 4,240,120 | 1,149,215 | 5,055,764 | 33,308 | 401,053 |
| Alabama | 682,136 | 419,323 | 20,032 | 4,199 | 79,354 | 24,182 | 123,635 | 891 | 10,520 |
| Alaska | 48,352 | 31,806 | 1,110 | 455 | 4,181 | 2,660 | 7,434 | 34 | 671 |
| Arizona | 739,215 | 524,072 | 22,724 | 3,386 | 68,697 | 18,202 | 94,331 | 537 | 7,267 |
| Arkansas | 413,161 | 262,175 | 11,675 | 2,226 | 44,929 | 12,504 | 73,503 | 419 | 5,729 |
| California | 3,700,149 | 2,599,176 | 125,598 | 23,035 | 370,509 | 104,935 | 441,912 | 2,570 | 32,413 |
| Colorado | 464,553 | 321,638 | 16,500 | 2,269 | 48,651 | 13,593 | 57,048 | 321 | 4,531 |
| Connecticut | 545,812 | 410,389 | 13,278 | 2,699 | 47,942 | 13,610 | 53,195 | 194 | 4,506 |
| Delaware | 128,722 | 90,827 | 3,538 | 686 | 12,389 | 3,378 | 16,533 | 63 | 1,309 |
| District of Columbia | 53,110 | 37,392 | 1,020 | 319 | 4,967 | 2,031 | 7,047 | 13 | 321 |
| Florida | 2,836,003 | 2,070,884 | 81,755 | 13,921 | 268,628 | 64,825 | 310,613 | 1,755 | 23,623 |
| Georgia | 946,402 | 618,705 | 24,126 | 5,214 | 96,160 | 36,658 | 152,502 | 832 | 12,203 |
| Hawaii | 165,897 | 127,042 | 4,018 | 1,178 | 13,647 | 3,936 | 14,740 | 111 | 1,226 |
| Idaho | 174,709 | 121,729 | 6,254 | 809 | 17,650 | 4,924 | 21,687 | 130 | 1,526 |
| Illinois | 1,656,310 | 1,166,520 | 48,929 | 9,202 | 186,301 | 50,289 | 179,242 | 957 | 14,869 |
| Indiana | 904,305 | 627,446 | 26,584 | 4,469 | 99,433 | 26,807 | 110,049 | 657 | 8,860 |
| Iowa | 461,377 | 327,771 | 16,569 | 1,897 | 54,817 | 10,698 | 45,905 | 270 | 3,451 |
| Kansas | 384,201 | 273,364 | 12,434 | 1,573 | 43,481 | 9,998 | 39,942 | 182 | 3,228 |
| Kentucky | 596,622 | 348,272 | 19,503 | 2,868 | 73,607 | 18,472 | 122,189 | 1,400 | 10,310 |
| Louisiana | 554,912 | 320,161 | 23,856 | 3,941 | 84,427 | 23,892 | 88,935 | 1,182 | 8,519 |
| Maine | 203,526 | 135,282 | 5,840 | 1,088 | 21,046 | 4,834 | 32,589 | 184 | 2,665 |
| Maryland | 648,926 | 457,981 | 17,071 | 3,480 | 68,168 | 23,161 | 73,240 | 294 | 5,531 |
| Massachusetts | 910,331 | 642,792 | 22,462 | 4,628 | 88,620 | 22,513 | 118,909 | 431 | 9,978 |
| Michigan | 1,527,251 | 1,038,152 | 49,190 | 8,679 | 170,534 | 45,437 | 197,717 | 1,206 | 16,336 |
| Minnesota | 651,995 | 468,864 | 21,131 | 3,005 | 69,358 | 16,652 | 67,844 | 217 | 4,925 |
| Mississippi | 398,933 | 239,524 | 9,748 | 2,918 | 42,950 | 16,745 | 79,139 | 599 | 7,311 |
| Missouri | 856,642 | 578,838 | 24,740 | 4,183 | 90,908 | 25,666 | 121,942 | 674 | 9,690 |
| Montana | 132,922 | 92,181 | 4,768 | 696 | 14,690 | 3,789 | 15,624 | 104 | 1,070 |
| Nebraska | 239,791 | 170,483 | 8,480 | 1,088 | 27,134 | 5,940 | 24,651 | 92 | 1,923 |
| Nevada | 287,020 | 207,882 | 6,907 | 1,510 | 23,542 | 7,102 | 37,277 | 127 | 2,674 |
| New Hampshire | 185,599 | 132,272 | 4,383 | 831 | 16,416 | 5,044 | 24,168 | 96 | 2,388 |
| New Jersey | 1,290,082 | 954,070 | 28,581 | 6,562 | 122,378 | 33,558 | 133,071 | 725 | 11,137 |
| New Mexico | 227,713 | 151,612 | 8,657 | 1,429 | 23,877 | 7,427 | 31,840 | 280 | 2,591 |
| New York | 2,714,171 | 1,934,215 | 68,752 | 16,835 | 259,386 | 71,396 | 334,336 | 2,194 | 27,056 |
| North Carolina | 1,177,092 | 799,761 | 25,932 | 5,194 | 105,902 | 35,011 | 189,842 | 821 | 14,628 |
| North Dakota | 90,332 | 61,117 | 4,131 | 362 | 13,400 | 2,111 | 8,472 | 85 | 654 |
| Ohio | 1,653,043 | 1,115,818 | 64,268 | 8,374 | 217,878 | 45,646 | 185,523 | 1,285 | 14,251 |
| Oklahoma | 497,056 | 332,585 | 15,519 | 2,589 | 58,121 | 16,109 | 66,850 | 587 | 4,698 |
| Oregon | 516,039 | 369,214 | 16,071 | 2,575 | 52,449 | 12,314 | 59,151 | 392 | 3,872 |
| Pennsylvania | 2,090,219 | 1,469,312 | 64,403 | 9,369 | 249,180 | 52,168 | 227,068 | 1,519 | 17,199 |
| Rhode Island | 164,610 | 118,977 | 3,011 | 649 | 14,118 | 3,997 | 22,181 | 91 | 1,586 |
| South Carolina | 596,232 | 395,377 | 13,662 | 3,167 | 55,232 | 20,220 | 99,997 | 477 | 8,100 |
| South Dakota | 107,611 | 75,068 | 4,308 | 424 | 13,085 | 3,271 | 10,551 | 38 | 866 |
| Tennessee | 843,532 | 547,486 | 24,258 | 4,217 | 92,549 | 27,774 | 135,407 | 1,012 | 10,831 |
| Texas | 2,264,203 | 1,502,818 | 87,255 | 13,078 | 281,331 | 81,135 | 273,967 | 2,427 | 22,193 |
| Utah | 216,984 | 154,130 | 8,394 | 1,320 | 20,967 | 8,148 | 21,891 | 104 | 2,029 |
| Vermont | 90,136 | 63,097 | 2,560 | 505 | 8,724 | 2,183 | 11,999 | 66 | 1,001 |
| Virginia | 903,758 | 613,262 | 26,158 | 4,369 | 93,442 | 27,824 | 127,405 | 932 | 10,365 |
| Washington | 789,061 | 560,867 | 25,885 | 3,862 | 76,979 | 20,059 | 94,396 | 479 | 6,534 |
| West Virginia | 327,353 | 185,682 | 12,825 | 1,668 | 46,100 | 9,815 | 65,510 | 1,031 | 4,723 |
| Wisconsin | 808,881 | 587,765 | 23,707 | 3,868 | 83,867 | 19,768 | 83,230 | 331 | 6,345 |
| Wyoming | 68,685 | 49,364 | 2,217 | 244 | 6,444 | 2,122 | 7,611 | 54 | 628 |

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J4—Total monthly benefits, by state or other area, program, and type of benefit, December 2003
(in thousands of dollars)—Continued**

| State or area | Total ^a | Retirement | | | Survivors | | Disability | | |
|--------------------------|--------------------|-----------------|---------|----------|------------------------|----------|------------------|---------|----------|
| | | Retired workers | Spouses | Children | Widow(er)s and parents | Children | Disabled workers | Spouses | Children |
| Outlying areas | | | | | | | | | |
| American Samoa | 2,672 | 870 | 38 | 127 | 329 | 374 | 803 | 8 | 123 |
| Guam | 6,935 | 4,026 | 318 | 190 | 712 | 661 | 881 | 23 | 124 |
| Northern Mariana Islands | 833 | 451 | 17 | 52 | 93 | 166 | 50 | 0 | 5 |
| Puerto Rico | 383,558 | 194,342 | 15,710 | 4,306 | 43,419 | 15,524 | 99,665 | 1,610 | 8,982 |
| Virgin Islands | 10,839 | 7,849 | 368 | 176 | 820 | 449 | 1,041 | 19 | 116 |
| Foreign countries | 210,499 | 131,322 | 14,135 | 2,026 | 45,865 | 7,161 | 9,069 | 172 | 750 |

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

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

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 state or other area and age, December 2003

| State or area | Total, all ages | 17 or under | 18–54 | 55–61 | 62–64 | 65–69 | 70–74 | 75–79 | 80–84 | 85–89 | 90–99 | 100 or older |
|------------------------|-----------------|-------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|--------------|
| All areas ^a | 47,053,140 | 3,081,490 | 4,255,900 | 2,193,730 | 4,068,870 | 9,164,510 | 7,974,050 | 6,962,480 | 5,081,550 | 2,798,860 | 1,431,230 | 40,470 |
| Alabama | 869,760 | 74,290 | 107,070 | 56,290 | 79,470 | 163,640 | 135,130 | 112,860 | 77,980 | 40,840 | 21,800 | 390 |
| Alaska | 61,070 | 7,500 | 7,080 | 2,890 | 5,980 | 12,970 | 9,740 | 6,880 | 4,780 | 2,310 | 930 | 10 |
| Arizona | 858,500 | 56,240 | 74,420 | 37,730 | 79,200 | 175,090 | 148,970 | 125,570 | 90,940 | 47,550 | 22,280 | 510 |
| Arkansas | 537,180 | 41,510 | 60,750 | 34,890 | 51,130 | 100,740 | 85,360 | 70,360 | 49,940 | 27,590 | 14,390 | 520 |
| California | 4,358,850 | 279,780 | 365,960 | 181,800 | 346,540 | 868,900 | 757,220 | 656,000 | 498,350 | 265,080 | 135,280 | 3,940 |
| Colorado | 559,130 | 35,510 | 48,750 | 22,740 | 47,480 | 116,950 | 98,210 | 81,610 | 58,790 | 32,120 | 16,600 | 370 |
| Connecticut | 583,220 | 31,660 | 44,340 | 21,100 | 39,690 | 107,030 | 101,330 | 95,320 | 75,250 | 43,920 | 22,880 | 700 |
| Delaware | 144,530 | 9,430 | 13,000 | 6,320 | 13,250 | 29,150 | 25,540 | 21,270 | 15,060 | 7,750 | 3,650 | 110 |
| District of Columbia | 72,330 | 4,660 | 7,000 | 2,810 | 4,490 | 13,160 | 12,300 | 10,900 | 8,960 | 4,960 | 2,980 | 110 |
| Florida | 3,333,390 | 192,500 | 246,040 | 135,300 | 282,710 | 652,210 | 591,670 | 532,350 | 386,800 | 207,870 | 103,330 | 2,610 |
| Georgia | 1,169,720 | 97,680 | 126,470 | 70,350 | 112,940 | 235,220 | 188,710 | 147,670 | 104,120 | 56,430 | 29,310 | 820 |
| Hawaii | 195,430 | 11,090 | 12,750 | 6,090 | 15,330 | 37,170 | 36,140 | 33,360 | 24,250 | 12,670 | 6,390 | 190 |
| Idaho | 211,670 | 13,610 | 17,900 | 9,410 | 20,620 | 42,450 | 36,440 | 29,930 | 21,850 | 12,880 | 6,450 | 130 |
| Illinois | 1,872,890 | 117,600 | 153,740 | 73,760 | 152,290 | 364,310 | 318,940 | 285,260 | 216,120 | 124,220 | 64,810 | 1,840 |
| Indiana | 1,025,720 | 65,380 | 95,840 | 45,970 | 92,620 | 199,930 | 172,850 | 151,300 | 109,390 | 60,600 | 30,820 | 1,020 |
| Iowa | 544,030 | 24,840 | 41,590 | 19,520 | 44,710 | 103,870 | 93,950 | 86,690 | 65,800 | 39,930 | 22,400 | 730 |
| Kansas | 443,830 | 25,490 | 35,960 | 16,930 | 33,430 | 84,630 | 75,940 | 68,200 | 53,190 | 31,260 | 18,220 | 580 |
| Kentucky | 769,060 | 61,250 | 104,450 | 52,950 | 71,140 | 141,410 | 116,320 | 98,150 | 67,250 | 36,810 | 18,960 | 370 |
| Louisiana | 731,080 | 67,310 | 84,590 | 40,910 | 64,900 | 134,220 | 116,800 | 100,580 | 67,720 | 34,780 | 18,690 | 580 |
| Maine | 262,600 | 17,030 | 30,480 | 13,990 | 21,840 | 48,480 | 43,210 | 37,710 | 27,320 | 14,870 | 7,530 | 140 |
| Maryland | 752,770 | 52,180 | 59,740 | 29,700 | 61,520 | 152,620 | 130,690 | 115,560 | 84,180 | 43,500 | 22,380 | 700 |
| Massachusetts | 1,064,340 | 63,320 | 105,300 | 44,250 | 70,440 | 190,360 | 177,690 | 167,230 | 129,380 | 75,510 | 39,720 | 1,140 |
| Michigan | 1,694,480 | 112,510 | 160,910 | 79,690 | 157,430 | 317,660 | 281,020 | 250,380 | 183,230 | 101,370 | 48,750 | 1,530 |
| Minnesota | 764,810 | 37,150 | 61,090 | 26,340 | 66,890 | 150,920 | 131,670 | 117,850 | 87,230 | 54,800 | 29,900 | 970 |
| Mississippi | 537,070 | 56,360 | 72,490 | 36,900 | 47,630 | 95,850 | 78,590 | 65,420 | 45,730 | 23,660 | 13,810 | 630 |
| Missouri | 1,034,170 | 71,990 | 103,240 | 52,570 | 93,000 | 196,860 | 170,190 | 146,560 | 106,450 | 60,060 | 32,230 | 1,020 |
| Montana | 163,720 | 10,080 | 13,120 | 6,800 | 16,710 | 32,780 | 27,650 | 23,140 | 17,980 | 10,180 | 5,170 | 110 |
| Nebraska | 287,910 | 15,580 | 22,210 | 10,400 | 21,010 | 55,960 | 50,250 | 45,730 | 34,070 | 20,750 | 11,530 | 420 |
| Nevada | 329,620 | 21,690 | 24,830 | 15,270 | 34,240 | 77,060 | 60,770 | 46,400 | 29,330 | 14,220 | 5,690 | 120 |
| New Hampshire | 213,520 | 14,540 | 21,250 | 8,910 | 17,290 | 40,680 | 37,240 | 32,390 | 21,680 | 12,760 | 6,500 | 280 |
| New Jersey | 1,366,270 | 78,100 | 101,580 | 52,940 | 100,860 | 263,930 | 243,530 | 221,680 | 166,200 | 91,210 | 45,170 | 1,070 |
| New Mexico | 295,640 | 23,960 | 28,950 | 13,730 | 27,370 | 58,980 | 51,290 | 40,520 | 28,090 | 15,090 | 7,490 | 170 |
| New York | 3,032,710 | 188,270 | 263,920 | 141,130 | 245,890 | 576,100 | 514,140 | 460,700 | 340,030 | 194,960 | 104,610 | 2,960 |
| North Carolina | 1,435,850 | 100,840 | 150,160 | 88,220 | 134,500 | 283,100 | 235,350 | 197,400 | 137,200 | 73,090 | 34,910 | 1,080 |
| North Dakota | 114,220 | 4,580 | 8,080 | 3,610 | 9,500 | 21,600 | 20,060 | 18,400 | 14,330 | 8,790 | 5,110 | 160 |
| Ohio | 1,937,110 | 106,290 | 166,350 | 82,120 | 165,610 | 375,850 | 333,070 | 306,980 | 221,210 | 120,560 | 57,490 | 1,580 |
| Oklahoma | 614,530 | 40,490 | 55,390 | 31,300 | 59,530 | 122,220 | 105,450 | 86,620 | 61,450 | 32,930 | 18,610 | 540 |
| Oregon | 597,950 | 30,880 | 47,990 | 25,680 | 57,880 | 116,260 | 99,030 | 89,620 | 70,160 | 39,560 | 20,440 | 450 |
| Pennsylvania | 2,387,770 | 124,790 | 192,230 | 97,350 | 195,490 | 442,590 | 414,120 | 392,070 | 287,870 | 162,480 | 76,910 | 1,870 |
| Rhode Island | 191,960 | 10,790 | 18,420 | 8,940 | 13,580 | 31,930 | 30,690 | 31,610 | 24,510 | 14,220 | 7,100 | 170 |
| South Carolina | 733,250 | 57,440 | 79,240 | 47,070 | 72,970 | 144,090 | 117,120 | 96,380 | 67,510 | 34,260 | 16,590 | 580 |
| South Dakota | 138,570 | 7,810 | 10,390 | 4,580 | 11,180 | 26,470 | 24,050 | 20,640 | 16,740 | 10,460 | 5,980 | 270 |
| Tennessee | 1,047,700 | 78,580 | 115,320 | 62,140 | 102,650 | 206,890 | 168,470 | 138,350 | 96,340 | 51,890 | 26,380 | 690 |
| Texas | 2,794,350 | 209,020 | 243,640 | 127,110 | 253,830 | 581,520 | 485,200 | 395,890 | 277,510 | 142,750 | 75,770 | 2,110 |
| Utah | 256,610 | 20,150 | 20,220 | 8,720 | 22,060 | 53,720 | 45,060 | 37,220 | 26,990 | 15,240 | 7,120 | 110 |
| Vermont | 108,900 | 6,910 | 11,010 | 4,900 | 9,780 | 21,110 | 18,530 | 15,040 | 11,480 | 6,620 | 3,420 | 100 |
| Virginia | 1,092,310 | 73,670 | 103,910 | 55,450 | 99,030 | 221,860 | 184,570 | 154,290 | 110,360 | 59,100 | 29,170 | 900 |
| Washington | 891,320 | 48,170 | 75,980 | 39,560 | 80,820 | 179,490 | 148,880 | 130,520 | 101,700 | 57,030 | 28,480 | 690 |
| West Virginia | 403,370 | 26,810 | 50,700 | 30,510 | 39,340 | 72,650 | 60,780 | 55,180 | 37,090 | 20,070 | 10,030 | 210 |
| Wisconsin | 924,150 | 45,360 | 72,960 | 34,860 | 81,920 | 180,460 | 158,170 | 144,550 | 106,080 | 65,330 | 33,510 | 950 |
| Wyoming | 80,650 | 5,150 | 6,430 | 3,360 | 7,410 | 17,500 | 14,100 | 11,620 | 8,110 | 4,600 | 2,310 | 60 |

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J5—Number, by state or other area and age, December 2003—Continued

| State or area | Total, all ages | 17 or under | 18–54 | 55–61 | 62–64 | 65–69 | 70–74 | 75–79 | 80–84 | 85–89 | 90–99 | 100 or older |
|--------------------------|--------------------|----------------|--------|--------|--------|---------|--------|--------|--------|--------|--------|-----------------|
| Outlying areas | | | | | | | | | | | | |
| American Samoa | 5,890 | 2,090 | 770 | 680 | 450 | 960 | 390 | 350 | 140 | 30 | 30 | 0 |
| Guam | 12,290 | 2,260 | 1,200 | 460 | 1,300 | 2,930 | 1,960 | 1,430 | 500 | 180 | 70 | 0 |
| Northern Mariana Islands | | | | | | | | | | | | |
| | 1,990 | 560 | 260 | 80 | 210 | 410 | 320 | 100 | 30 | 10 | 10 | 0 |
| Puerto Rico | 698,010 | 76,110 | 94,210 | 58,760 | 76,740 | 124,540 | 95,800 | 74,580 | 51,810 | 29,340 | 15,660 | 460 |
| Virgin Islands | 15,070 | 1,420 | 940 | 630 | 1,900 | 4,070 | 2,410 | 1,870 | 1,010 | 480 | 330 | 10 |
| Foreign countries | 423,010 | 20,150 | 12,720 | 7,090 | 30,710 | 89,770 | 90,190 | 75,800 | 53,700 | 27,140 | 15,050 | 690 |

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

a. Includes beneficiaries with unknown state code.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J5.1—Number, by state or other area, race, and sex, December 2003

| State or area | All races | | | Adult beneficiaries | | |
|------------------------|--------------------|------------|-----------|---------------------|------------|------------|
| | Total ^a | White | Black | Other ^b | Men | Women |
| All areas ^c | 47,053,140 | 39,644,330 | 4,836,700 | 2,429,420 | 18,579,420 | 24,506,910 |
| Alabama | 869,760 | 651,390 | 196,550 | 20,410 | 327,510 | 447,480 |
| Alaska | 61,070 | 46,430 | 2,150 | 12,310 | 25,780 | 26,780 |
| Arizona | 858,500 | 775,020 | 23,030 | 58,490 | 354,440 | 436,420 |
| Arkansas | 537,180 | 457,370 | 66,100 | 12,840 | 209,010 | 275,750 |
| California | 4,358,850 | 3,474,840 | 307,930 | 559,110 | 1,770,620 | 2,240,180 |
| Colorado | 559,130 | 511,330 | 19,740 | 26,230 | 227,910 | 288,030 |
| Connecticut | 583,220 | 521,870 | 39,040 | 19,780 | 227,790 | 313,390 |
| Delaware | 144,530 | 118,300 | 22,000 | 3,910 | 57,040 | 75,840 |
| District of Columbia | 72,330 | 18,200 | 50,660 | 3,070 | 27,330 | 38,600 |
| Florida | 3,333,390 | 2,871,890 | 318,970 | 131,410 | 1,373,990 | 1,724,650 |
| Georgia | 1,169,720 | 852,200 | 282,380 | 32,640 | 440,840 | 606,190 |
| Hawaii | 195,430 | 53,040 | 2,110 | 139,370 | 81,080 | 100,720 |
| Idaho | 211,670 | 203,360 | 450 | 7,160 | 88,620 | 106,450 |
| Illinois | 1,872,890 | 1,550,040 | 244,260 | 73,330 | 725,020 | 992,890 |
| Indiana | 1,025,720 | 927,970 | 75,350 | 20,030 | 395,060 | 543,960 |
| Iowa | 544,030 | 525,520 | 8,460 | 8,830 | 216,950 | 292,430 |
| Kansas | 443,830 | 409,330 | 21,610 | 11,720 | 172,800 | 238,230 |
| Kentucky | 769,060 | 704,050 | 45,960 | 17,310 | 303,260 | 386,050 |
| Louisiana | 731,080 | 508,960 | 199,590 | 20,670 | 282,330 | 360,180 |
| Maine | 262,600 | 253,400 | 820 | 7,400 | 107,320 | 132,630 |
| Maryland | 752,770 | 549,180 | 172,310 | 29,280 | 288,290 | 400,240 |
| Massachusetts | 1,064,340 | 972,130 | 43,130 | 43,800 | 410,590 | 570,040 |
| Michigan | 1,694,480 | 1,437,750 | 208,810 | 43,810 | 663,060 | 881,900 |
| Minnesota | 764,810 | 728,750 | 14,000 | 19,560 | 306,020 | 407,630 |
| Mississippi | 537,070 | 364,190 | 159,700 | 12,280 | 198,350 | 267,990 |
| Missouri | 1,034,170 | 919,370 | 92,880 | 19,740 | 404,250 | 538,050 |
| Montana | 163,720 | 155,800 | 330 | 7,090 | 69,040 | 82,050 |
| Nebraska | 287,910 | 271,000 | 9,160 | 7,150 | 112,560 | 155,160 |
| Nevada | 329,620 | 283,750 | 22,130 | 22,980 | 144,620 | 160,460 |
| New Hampshire | 213,520 | 205,550 | 1,990 | 5,300 | 84,780 | 110,470 |
| New Jersey | 1,366,270 | 1,139,360 | 155,340 | 66,780 | 524,290 | 741,230 |
| New Mexico | 295,640 | 255,780 | 5,190 | 33,780 | 121,410 | 144,810 |
| New York | 3,032,710 | 2,444,320 | 369,390 | 204,340 | 1,169,100 | 1,613,740 |
| North Carolina | 1,435,850 | 1,112,940 | 279,990 | 40,250 | 550,790 | 756,520 |
| North Dakota | 114,220 | 109,680 | 260 | 3,810 | 45,920 | 61,310 |
| Ohio | 1,937,110 | 1,709,170 | 184,370 | 37,780 | 761,410 | 1,027,430 |
| Oklahoma | 614,530 | 550,400 | 34,620 | 27,980 | 242,310 | 319,770 |
| Oregon | 597,950 | 567,650 | 7,600 | 21,110 | 247,540 | 310,920 |
| Pennsylvania | 2,387,770 | 2,145,870 | 181,630 | 54,910 | 923,130 | 1,295,120 |
| Rhode Island | 191,960 | 176,970 | 6,080 | 7,990 | 74,140 | 103,410 |
| South Carolina | 733,250 | 533,540 | 182,610 | 15,300 | 278,880 | 381,110 |
| South Dakota | 138,570 | 131,010 | 540 | 6,690 | 54,940 | 73,050 |
| Tennessee | 1,047,700 | 894,980 | 127,570 | 23,220 | 399,640 | 546,880 |
| Texas | 2,794,350 | 2,319,920 | 302,590 | 165,260 | 1,109,840 | 1,424,430 |
| Utah | 256,610 | 243,190 | 1,560 | 11,130 | 104,080 | 128,290 |
| Vermont | 108,900 | 105,640 | 420 | 2,220 | 44,110 | 55,730 |
| Virginia | 1,092,310 | 854,960 | 199,660 | 34,940 | 424,660 | 573,590 |
| Washington | 891,320 | 815,950 | 22,400 | 50,410 | 367,470 | 461,500 |
| West Virginia | 403,370 | 381,600 | 11,020 | 9,970 | 164,810 | 199,980 |
| Wisconsin | 924,150 | 868,330 | 35,540 | 17,460 | 373,110 | 487,520 |
| Wyoming | 80,650 | 77,510 | 330 | 2,540 | 34,780 | 39,590 |

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J5.1—Number, by state or other area, race, and sex, December 2003—Continued

| State or area | All races | | | Adult beneficiaries | | |
|--------------------------|--------------------|---------|--------|---------------------|---------|---------|
| | Total ^a | White | Black | Other ^b | Men | Women |
| Outlying areas | | | | | | |
| American Samoa | 5,890 | 420 | 20 | 5,440 | 1,710 | 2,010 |
| Guam | 12,290 | 1,430 | 270 | 10,460 | 5,000 | 4,830 |
| Northern Mariana Islands | 1,990 | 230 | 30 | 1,720 | 670 | 670 |
| Puerto Rico | 698,010 | 529,150 | 50,960 | 114,470 | 273,460 | 324,040 |
| Virgin Islands | 15,070 | 2,740 | 11,110 | 1,140 | 6,180 | 7,030 |
| Foreign countries | 423,010 | 345,490 | 13,390 | 60,760 | 177,430 | 220,010 |

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.

- a. Includes 142,690 persons of unknown race.
- b. Includes Asians and Pacific Islanders, American Indians and Alaska Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries among those three groups is not available.
- c. Includes beneficiaries with unknown state code.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J6—Percentage distribution of monthly benefit for retired workers, by state or other area and monthly benefit, December 2003

| State or area | Number | Percentage distribution by dollar amount of benefit | | | | | | | | | | | Monthly benefit (dollars) | |
|------------------------|------------|---|------------------|---------------|---------------|---------------|---------------|---------------|-------------------|-------------------|-------------------|------------------|---------------------------|----------|
| | | Total | Less than 500.00 | 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 | 1,200.00–1,299.90 | 1,300.00 or more | Average | Median |
| All areas ^a | 29,547,530 | 100.0 | 12.8 | 9.6 | 8.6 | 7.9 | 8.4 | 9.7 | 10.8 | 9.5 | 7.5 | 15.2 | 922.10 | 929.60 |
| Alabama | 477,940 | 100.0 | 13.9 | 10.7 | 10.0 | 9.3 | 9.6 | 10.2 | 10.0 | 8.3 | 6.5 | 11.7 | 877.40 | 865.60 |
| Alaska | 35,650 | 100.0 | 16.3 | 10.2 | 9.3 | 8.2 | 8.3 | 8.2 | 8.6 | 8.2 | 7.0 | 15.8 | 892.20 | 870.00 |
| Arizona | 558,440 | 100.0 | 11.0 | 9.4 | 8.2 | 7.5 | 8.4 | 10.2 | 11.9 | 10.2 | 8.0 | 15.3 | 938.50 | 957.60 |
| Arkansas | 306,640 | 100.0 | 14.0 | 11.3 | 10.9 | 10.5 | 10.4 | 10.1 | 9.7 | 7.8 | 5.7 | 9.8 | 855.00 | 833.60 |
| California | 2,806,590 | 100.0 | 15.1 | 9.2 | 8.3 | 7.5 | 7.8 | 8.6 | 9.6 | 8.9 | 7.3 | 17.8 | 926.10 | 926.60 |
| Colorado | 356,610 | 100.0 | 15.4 | 9.4 | 8.4 | 7.7 | 7.9 | 9.0 | 10.1 | 9.4 | 7.4 | 15.2 | 901.90 | 911.60 |
| Connecticut | 406,150 | 100.0 | 8.0 | 7.8 | 7.4 | 7.0 | 7.5 | 9.8 | 11.1 | 10.9 | 8.9 | 21.5 | 1,010.40 | 1,023.00 |
| Delaware | 93,970 | 100.0 | 8.7 | 9.3 | 7.7 | 7.1 | 7.8 | 10.2 | 13.0 | 11.7 | 8.4 | 16.3 | 966.60 | 992.60 |
| District of Columbia | 47,590 | 100.0 | 28.9 | 11.3 | 9.3 | 8.7 | 6.8 | 7.2 | 5.4 | 4.7 | 4.1 | 13.7 | 785.70 | 704.60 |
| Florida | 2,255,400 | 100.0 | 12.2 | 10.0 | 8.8 | 8.1 | 8.8 | 10.1 | 10.9 | 9.5 | 7.2 | 14.3 | 918.20 | 920.80 |
| Georgia | 691,420 | 100.0 | 13.1 | 10.2 | 10.2 | 9.3 | 9.1 | 9.4 | 9.7 | 8.7 | 6.8 | 13.5 | 894.80 | 878.00 |
| Hawaii | 139,300 | 100.0 | 14.1 | 9.4 | 8.0 | 7.7 | 9.1 | 10.3 | 10.9 | 9.1 | 7.0 | 14.4 | 912.00 | 916.60 |
| Idaho | 135,300 | 100.0 | 13.0 | 9.8 | 8.7 | 8.0 | 9.7 | 10.8 | 11.4 | 9.5 | 7.4 | 11.9 | 899.70 | 909.60 |
| Illinois | 1,213,840 | 100.0 | 11.2 | 8.9 | 7.9 | 6.9 | 7.4 | 9.5 | 11.1 | 10.3 | 8.7 | 18.2 | 961.00 | 982.60 |
| Indiana | 648,910 | 100.0 | 7.9 | 9.2 | 7.7 | 7.0 | 8.4 | 11.3 | 12.7 | 11.3 | 8.9 | 15.5 | 966.90 | 987.60 |
| Iowa | 356,440 | 100.0 | 10.6 | 10.1 | 8.5 | 8.0 | 9.3 | 11.1 | 12.1 | 10.0 | 8.0 | 12.3 | 919.60 | 932.60 |
| Kansas | 289,600 | 100.0 | 10.2 | 9.4 | 8.5 | 8.0 | 8.6 | 10.6 | 11.3 | 10.3 | 7.6 | 15.4 | 943.90 | 950.60 |
| Kentucky | 400,290 | 100.0 | 15.1 | 10.5 | 9.4 | 8.9 | 9.1 | 10.1 | 10.5 | 8.6 | 6.6 | 11.0 | 870.10 | 865.60 |
| Louisiana | 373,300 | 100.0 | 18.5 | 10.9 | 9.1 | 8.2 | 7.9 | 8.7 | 9.8 | 7.9 | 6.4 | 12.6 | 857.70 | 843.60 |
| Maine | 158,990 | 100.0 | 16.0 | 10.9 | 9.8 | 9.5 | 9.7 | 10.1 | 10.1 | 8.0 | 5.7 | 10.2 | 850.90 | 839.00 |
| Maryland | 493,610 | 100.0 | 14.5 | 8.8 | 8.1 | 7.7 | 7.9 | 9.0 | 10.3 | 9.1 | 7.6 | 17.0 | 927.80 | 935.60 |
| Massachusetts | 693,520 | 100.0 | 14.1 | 9.6 | 8.6 | 7.7 | 7.8 | 8.9 | 9.7 | 9.1 | 7.2 | 17.4 | 926.90 | 926.60 |
| Michigan | 1,045,410 | 100.0 | 7.5 | 8.7 | 7.0 | 6.1 | 7.9 | 10.9 | 12.9 | 11.8 | 9.3 | 17.9 | 993.10 | 1016.60 |
| Minnesota | 509,800 | 100.0 | 12.0 | 10.2 | 8.8 | 7.8 | 8.1 | 9.5 | 11.2 | 10.0 | 8.0 | 14.3 | 919.70 | 934.60 |
| Mississippi | 284,330 | 100.0 | 15.8 | 11.6 | 10.9 | 10.4 | 9.9 | 9.5 | 9.2 | 7.2 | 5.5 | 10.0 | 842.40 | 813.00 |
| Missouri | 635,810 | 100.0 | 12.3 | 9.9 | 9.0 | 8.2 | 8.9 | 9.9 | 11.4 | 9.7 | 7.5 | 13.1 | 910.40 | 917.60 |
| Montana | 104,160 | 100.0 | 13.3 | 10.2 | 9.4 | 8.6 | 9.4 | 10.2 | 11.5 | 9.8 | 7.2 | 10.5 | 885.00 | 892.60 |
| Nebraska | 188,550 | 100.0 | 12.0 | 10.0 | 9.6 | 8.8 | 9.4 | 10.1 | 11.1 | 9.1 | 7.3 | 12.5 | 904.20 | 901.00 |
| Nevada | 223,790 | 100.0 | 12.4 | 9.1 | 8.7 | 7.7 | 8.6 | 9.5 | 10.1 | 10.2 | 8.0 | 15.7 | 928.90 | 937.60 |
| New Hampshire | 140,150 | 100.0 | 10.0 | 9.0 | 8.7 | 8.4 | 9.1 | 10.4 | 10.9 | 9.8 | 7.8 | 15.8 | 943.80 | 947.60 |
| New Jersey | 937,110 | 100.0 | 8.2 | 8.3 | 7.4 | 6.8 | 7.3 | 8.6 | 10.5 | 10.6 | 9.1 | 23.3 | 1,018.10 | 1,036.60 |
| New Mexico | 176,090 | 100.0 | 17.0 | 10.2 | 9.4 | 8.8 | 9.4 | 9.3 | 9.5 | 8.3 | 6.3 | 11.8 | 861.00 | 848.60 |
| New York | 1,980,420 | 100.0 | 10.2 | 8.7 | 7.9 | 7.3 | 8.0 | 9.7 | 11.0 | 10.1 | 8.2 | 19.0 | 976.70 | 983.60 |
| North Carolina | 889,780 | 100.0 | 10.8 | 9.8 | 10.1 | 10.3 | 10.6 | 10.7 | 10.5 | 8.8 | 6.5 | 11.9 | 898.80 | 884.60 |
| North Dakota | 71,190 | 100.0 | 15.6 | 10.7 | 10.2 | 9.6 | 9.5 | 9.4 | 10.3 | 8.2 | 6.2 | 10.4 | 858.50 | 842.60 |
| Ohio | 1,190,200 | 100.0 | 12.5 | 8.9 | 7.3 | 6.5 | 7.4 | 10.3 | 12.3 | 10.9 | 8.7 | 15.2 | 937.50 | 975.00 |
| Oklahoma | 376,500 | 100.0 | 14.1 | 10.4 | 9.1 | 9.0 | 9.4 | 10.2 | 10.8 | 8.7 | 6.5 | 11.7 | 883.40 | 880.00 |
| Oregon | 396,470 | 100.0 | 10.6 | 9.6 | 8.3 | 7.3 | 8.4 | 11.3 | 12.5 | 10.6 | 8.2 | 13.2 | 931.30 | 953.60 |
| Pennsylvania | 1,549,580 | 100.0 | 9.8 | 9.3 | 7.9 | 7.3 | 8.5 | 11.1 | 12.8 | 10.7 | 8.2 | 14.6 | 948.20 | 968.60 |
| Rhode Island | 128,890 | 100.0 | 11.4 | 9.2 | 9.2 | 8.1 | 10.3 | 10.7 | 10.3 | 9.3 | 7.2 | 14.3 | 923.10 | 917.60 |
| South Carolina | 441,090 | 100.0 | 11.6 | 10.0 | 9.9 | 10.0 | 10.3 | 10.6 | 10.1 | 8.8 | 6.5 | 12.3 | 896.40 | 883.00 |
| South Dakota | 88,800 | 100.0 | 16.2 | 11.4 | 9.7 | 9.6 | 9.6 | 10.3 | 10.3 | 7.8 | 6.0 | 9.0 | 845.40 | 830.60 |
| Tennessee | 612,120 | 100.0 | 12.3 | 10.3 | 10.1 | 9.6 | 9.6 | 10.1 | 10.4 | 8.5 | 6.6 | 12.4 | 894.40 | 880.60 |
| Texas | 1,673,450 | 100.0 | 15.6 | 9.9 | 9.1 | 8.2 | 8.2 | 8.8 | 9.7 | 8.4 | 6.7 | 15.4 | 898.00 | 888.60 |
| Utah | 166,430 | 100.0 | 13.8 | 10.1 | 8.0 | 6.7 | 7.2 | 8.3 | 11.0 | 9.9 | 8.6 | 16.4 | 926.10 | 953.00 |
| Vermont | 69,170 | 100.0 | 11.3 | 10.1 | 8.4 | 8.6 | 10.1 | 10.9 | 11.4 | 9.8 | 6.9 | 12.5 | 912.20 | 915.60 |
| Virginia | 678,480 | 100.0 | 13.8 | 9.8 | 9.2 | 8.9 | 8.8 | 9.4 | 10.0 | 8.6 | 6.9 | 14.5 | 903.90 | 893.60 |
| Washington | 584,350 | 100.0 | 10.2 | 9.0 | 7.6 | 7.1 | 7.8 | 9.8 | 11.7 | 11.1 | 8.9 | 16.7 | 959.80 | 985.60 |
| West Virginia | 204,130 | 100.0 | 11.2 | 9.2 | 8.5 | 8.0 | 9.8 | 11.6 | 13.3 | 10.0 | 7.6 | 10.8 | 909.60 | 932.60 |
| Wisconsin | 622,330 | 100.0 | 9.1 | 9.9 | 8.0 | 7.2 | 8.1 | 10.8 | 13.3 | 11.4 | 8.9 | 13.4 | 944.50 | 973.60 |
| Wyoming | 53,630 | 100.0 | 11.8 | 10.7 | 8.3 | 7.5 | 8.9 | 9.2 | 11.0 | 10.2 | 8.1 | 14.2 | 920.50 | 932.60 |

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J6—Percentage distribution of monthly benefit for retired workers, by state or other area and monthly benefit, December 2003—Continued

| State or area | Number | Percentage distribution by dollar amount of benefit | | | | | | | | | | | Monthly benefit (dollars) | |
|--------------------------|---------|---|------------------|---------------|---------------|---------------|---------------|---------------|-------------------|-------------------|-------------------|------------------|---------------------------|--------|
| | | Total | Less than 500.00 | 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 | 1,200.00–1,299.90 | 1,300.00 or more | Average | Median |
| Outlying areas | | | | | | | | | | | | | | |
| American Samoa | 1,580 | 100.0 | 46.8 | 18.4 | 10.8 | 7.0 | 1.3 | 7.0 | 5.1 | 0.6 | 1.9 | 1.3 | 550.90 | 514.80 |
| Guam | 6,350 | 100.0 | 39.8 | 15.4 | 11.0 | 9.3 | 6.1 | 5.5 | 3.5 | 3.0 | 1.6 | 4.7 | 634.10 | 563.00 |
| Northern Mariana Islands | | | | | | | | | | | | | | |
| | 900 | 100.0 | 54.4 | 21.1 | 6.7 | 3.3 | 5.6 | 1.1 | 1.1 | 1.1 | 2.2 | 3.3 | 500.60 | 469.30 |
| Puerto Rico | 317,870 | 100.0 | 38.6 | 17.3 | 12.9 | 9.5 | 6.5 | 5.1 | 3.4 | 2.3 | 1.6 | 2.8 | 611.40 | 563.60 |
| Virgin Islands | 9,760 | 100.0 | 19.1 | 15.1 | 11.4 | 10.5 | 9.2 | 7.9 | 6.9 | 5.7 | 4.6 | 9.7 | 804.20 | 743.80 |
| Foreign countries | 246,890 | 100.0 | 51.4 | 12.8 | 8.9 | 6.6 | 5.2 | 4.4 | 3.5 | 2.5 | 1.7 | 3.1 | 531.90 | 490.00 |

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

a. Includes beneficiaries with unknown state code.

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5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J8—Percentage distribution of disabled workers, by state or other area and monthly benefit, December 2003

| State or area | Number | Percentage distribution by dollar amount of benefit | | | | | | | | | | | Monthly benefit (dollars) | |
|------------------------|-----------|---|------------------|---------------|---------------|---------------|---------------|---------------|-------------------|-------------------|-------------------|------------------|---------------------------|--------|
| | | Total | Less than 500.00 | 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 | 1,200.00–1,299.90 | 1,300.00 or more | Average | Median |
| All areas ^a | 5,867,460 | 100.0 | 13.9 | 12.2 | 12.7 | 11.3 | 9.7 | 8.2 | 6.8 | 5.5 | 4.7 | 15.0 | 861.70 | 799.60 |
| Alabama | 148,620 | 100.0 | 14.3 | 13.5 | 13.9 | 12.0 | 10.4 | 8.1 | 6.0 | 5.0 | 4.2 | 12.5 | 831.90 | 765.00 |
| Alaska | 8,810 | 100.0 | 16.0 | 13.1 | 14.4 | 11.4 | 9.5 | 6.7 | 4.1 | 4.4 | 4.4 | 16.0 | 843.80 | 756.00 |
| Arizona | 105,940 | 100.0 | 11.9 | 11.8 | 12.4 | 10.7 | 10.1 | 8.2 | 7.1 | 5.9 | 5.2 | 16.8 | 890.40 | 830.00 |
| Arkansas | 90,170 | 100.0 | 14.7 | 13.5 | 13.7 | 12.3 | 11.1 | 9.0 | 6.6 | 5.2 | 4.0 | 9.9 | 815.20 | 765.60 |
| California | 504,560 | 100.0 | 15.0 | 11.6 | 11.5 | 10.4 | 9.0 | 7.9 | 6.8 | 5.7 | 4.8 | 17.2 | 875.80 | 814.60 |
| Colorado | 66,740 | 100.0 | 13.5 | 12.7 | 12.8 | 11.2 | 10.3 | 8.3 | 7.0 | 6.1 | 4.7 | 13.5 | 854.80 | 798.60 |
| Connecticut | 59,530 | 100.0 | 12.0 | 11.5 | 11.6 | 12.2 | 9.4 | 8.3 | 6.9 | 5.9 | 4.8 | 17.5 | 893.60 | 826.00 |
| Delaware | 18,350 | 100.0 | 12.4 | 11.1 | 12.2 | 11.9 | 7.8 | 8.4 | 6.6 | 5.7 | 5.3 | 18.6 | 901.00 | 835.60 |
| District of Columbia | 8,850 | 100.0 | 16.8 | 12.3 | 15.6 | 13.0 | 9.6 | 8.7 | 6.9 | 4.7 | 2.7 | 9.6 | 796.30 | 738.00 |
| Florida | 359,840 | 100.0 | 13.0 | 12.3 | 12.7 | 11.5 | 10.1 | 8.5 | 6.9 | 5.8 | 4.8 | 14.5 | 863.20 | 803.60 |
| Georgia | 180,490 | 100.0 | 13.0 | 12.1 | 13.8 | 12.3 | 10.5 | 9.0 | 7.4 | 5.4 | 4.5 | 12.0 | 844.90 | 788.60 |
| Hawaii | 16,790 | 100.0 | 11.6 | 12.2 | 12.9 | 11.3 | 9.2 | 9.1 | 7.0 | 6.8 | 4.4 | 15.5 | 877.90 | 819.60 |
| Idaho | 25,690 | 100.0 | 14.9 | 13.5 | 13.0 | 10.2 | 9.2 | 8.4 | 6.7 | 5.8 | 4.7 | 13.6 | 844.20 | 782.00 |
| Illinois | 200,490 | 100.0 | 12.8 | 11.7 | 11.8 | 10.6 | 9.2 | 8.1 | 6.8 | 5.6 | 5.3 | 18.0 | 894.00 | 834.00 |
| Indiana | 126,820 | 100.0 | 14.3 | 12.4 | 11.8 | 11.2 | 9.5 | 7.9 | 6.7 | 5.2 | 4.9 | 16.1 | 867.80 | 802.60 |
| Iowa | 55,450 | 100.0 | 16.1 | 13.6 | 12.5 | 11.0 | 9.3 | 8.1 | 6.9 | 5.6 | 4.9 | 12.2 | 827.90 | 771.00 |
| Kansas | 48,000 | 100.0 | 14.7 | 13.6 | 13.1 | 11.6 | 9.6 | 8.4 | 6.7 | 5.8 | 4.5 | 12.1 | 832.10 | 772.60 |
| Kentucky | 144,060 | 100.0 | 16.1 | 12.3 | 12.5 | 10.5 | 9.2 | 7.7 | 6.6 | 5.5 | 4.8 | 14.8 | 848.20 | 786.00 |
| Louisiana | 103,980 | 100.0 | 16.4 | 11.6 | 12.3 | 10.4 | 9.3 | 7.3 | 6.3 | 5.5 | 5.0 | 16.0 | 855.30 | 793.80 |
| Maine | 41,390 | 100.0 | 16.6 | 13.9 | 14.2 | 12.7 | 11.0 | 7.9 | 6.8 | 5.0 | 3.5 | 8.3 | 787.40 | 736.00 |
| Maryland | 81,690 | 100.0 | 11.9 | 10.8 | 12.1 | 11.0 | 10.1 | 9.2 | 6.9 | 5.6 | 5.2 | 17.1 | 896.60 | 838.60 |
| Massachusetts | 140,000 | 100.0 | 12.7 | 13.0 | 13.6 | 12.4 | 10.3 | 8.4 | 6.5 | 5.4 | 4.3 | 13.3 | 849.30 | 785.00 |
| Michigan | 215,210 | 100.0 | 13.7 | 10.7 | 10.8 | 9.4 | 8.7 | 7.6 | 6.5 | 5.8 | 5.5 | 21.4 | 918.70 | 861.00 |
| Minnesota | 80,110 | 100.0 | 14.1 | 12.9 | 13.5 | 11.1 | 10.1 | 8.1 | 6.6 | 5.4 | 4.8 | 13.5 | 846.90 | 784.00 |
| Mississippi | 98,230 | 100.0 | 14.7 | 12.9 | 15.2 | 13.5 | 10.8 | 8.2 | 6.4 | 5.0 | 4.0 | 9.4 | 805.70 | 751.00 |
| Missouri | 144,970 | 100.0 | 14.4 | 13.1 | 13.1 | 11.8 | 9.5 | 8.2 | 6.9 | 5.3 | 4.5 | 13.2 | 841.20 | 778.00 |
| Montana | 18,770 | 100.0 | 15.5 | 12.8 | 13.3 | 10.0 | 10.7 | 8.6 | 6.5 | 4.9 | 5.3 | 12.5 | 832.40 | 780.00 |
| Nebraska | 30,090 | 100.0 | 15.2 | 14.2 | 14.3 | 11.7 | 8.6 | 7.2 | 7.3 | 5.6 | 4.6 | 11.1 | 819.20 | 746.00 |
| Nevada | 40,060 | 100.0 | 10.1 | 9.5 | 12.2 | 10.8 | 9.0 | 8.6 | 7.9 | 6.5 | 5.9 | 19.6 | 930.50 | 878.60 |
| New Hampshire | 28,010 | 100.0 | 11.2 | 13.1 | 14.0 | 12.0 | 9.8 | 9.3 | 6.7 | 5.4 | 5.2 | 13.4 | 862.80 | 798.00 |
| New Jersey | 141,810 | 100.0 | 10.5 | 10.5 | 11.3 | 10.2 | 9.3 | 8.5 | 7.1 | 6.0 | 5.2 | 21.4 | 938.40 | 880.00 |
| New Mexico | 38,530 | 100.0 | 14.7 | 14.3 | 13.4 | 10.8 | 10.1 | 8.4 | 6.6 | 5.3 | 4.8 | 11.5 | 826.40 | 768.60 |
| New York | 367,160 | 100.0 | 12.9 | 10.9 | 11.6 | 10.1 | 9.0 | 7.8 | 7.0 | 5.6 | 5.2 | 19.8 | 910.60 | 848.60 |
| North Carolina | 225,420 | 100.0 | 12.0 | 12.0 | 13.5 | 13.0 | 11.5 | 9.6 | 7.4 | 5.7 | 4.4 | 10.8 | 842.20 | 794.60 |
| North Dakota | 10,410 | 100.0 | 18.1 | 12.7 | 14.0 | 10.6 | 9.7 | 7.0 | 7.3 | 4.3 | 4.0 | 12.3 | 813.80 | 754.60 |
| Ohio | 218,660 | 100.0 | 17.0 | 12.7 | 11.5 | 10.3 | 8.9 | 7.4 | 6.4 | 5.5 | 5.1 | 15.3 | 848.50 | 785.60 |
| Oklahoma | 78,980 | 100.0 | 15.4 | 11.9 | 12.3 | 11.3 | 9.7 | 8.2 | 7.1 | 6.0 | 4.8 | 13.4 | 846.40 | 793.00 |
| Oregon | 69,030 | 100.0 | 14.8 | 13.0 | 12.0 | 11.0 | 9.2 | 7.9 | 6.6 | 5.6 | 4.8 | 15.2 | 856.90 | 793.60 |
| Pennsylvania | 259,270 | 100.0 | 13.9 | 11.5 | 12.2 | 10.6 | 9.0 | 8.1 | 7.3 | 6.1 | 5.3 | 16.0 | 875.80 | 819.00 |
| Rhode Island | 26,200 | 100.0 | 13.5 | 13.0 | 13.5 | 11.6 | 10.0 | 8.3 | 6.9 | 5.2 | 4.8 | 13.2 | 846.60 | 785.80 |
| South Carolina | 117,630 | 100.0 | 11.4 | 11.7 | 13.6 | 13.0 | 11.2 | 9.6 | 7.5 | 6.0 | 4.6 | 11.4 | 850.10 | 802.60 |
| South Dakota | 13,220 | 100.0 | 18.8 | 12.7 | 12.9 | 12.4 | 9.6 | 8.3 | 6.0 | 4.7 | 4.5 | 10.2 | 798.10 | 738.60 |
| Tennessee | 163,300 | 100.0 | 13.7 | 12.8 | 14.0 | 12.9 | 10.5 | 8.6 | 6.9 | 5.2 | 4.1 | 11.3 | 829.20 | 772.00 |
| Texas | 320,980 | 100.0 | 14.2 | 12.2 | 12.6 | 11.3 | 9.9 | 8.6 | 7.1 | 5.6 | 4.7 | 13.8 | 853.50 | 797.00 |
| Utah | 25,670 | 100.0 | 16.2 | 13.0 | 12.6 | 10.3 | 8.2 | 6.9 | 7.1 | 4.8 | 4.6 | 16.3 | 852.80 | 778.60 |
| Vermont | 14,550 | 100.0 | 14.1 | 13.4 | 13.1 | 12.7 | 10.7 | 9.4 | 6.3 | 5.8 | 3.7 | 10.9 | 824.70 | 772.00 |
| Virginia | 147,530 | 100.0 | 13.0 | 11.9 | 12.7 | 11.8 | 10.2 | 8.4 | 7.2 | 5.6 | 4.6 | 14.7 | 863.60 | 806.60 |
| Washington | 107,660 | 100.0 | 14.2 | 12.3 | 12.0 | 10.0 | 9.5 | 7.8 | 6.7 | 5.3 | 4.8 | 17.4 | 876.80 | 813.00 |
| West Virginia | 72,720 | 100.0 | 14.8 | 10.6 | 10.2 | 10.4 | 8.5 | 7.8 | 6.5 | 5.7 | 5.5 | 19.9 | 900.80 | 844.80 |
| Wisconsin | 96,780 | 100.0 | 14.7 | 12.0 | 12.9 | 10.7 | 9.5 | 7.9 | 6.6 | 5.9 | 4.7 | 15.2 | 860.00 | 797.80 |
| Wyoming | 8,760 | 100.0 | 16.9 | 11.5 | 11.6 | 11.1 | 6.3 | 6.6 | 7.4 | 6.3 | 6.2 | 16.1 | 868.90 | 790.80 |

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J8—Percentage distribution of disabled workers, by state or other area and monthly benefit, December 2003—Continued

| State or area | Number | Percentage distribution by dollar amount of benefit | | | | | | | | | | | Monthly benefit (dollars) | |
|--------------------------|---------|---|------------------|---------------|---------------|---------------|---------------|---------------|-------------------|-------------------|-------------------|------------------|---------------------------|--------|
| | | Total | Less than 500.00 | 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 | 1,200.00–1,299.90 | 1,300.00 or more | Average | Median |
| Outlying areas | | | | | | | | | | | | | | |
| American Samoa | 1,230 | 100.0 | 32.5 | 17.1 | 9.8 | 8.1 | 10.6 | 11.4 | 4.1 | 2.4 | 0.8 | 3.3 | 653.20 | 609.60 |
| Guam | 1,110 | 100.0 | 22.5 | 11.7 | 14.4 | 6.3 | 8.1 | 12.6 | 3.6 | 5.4 | 2.7 | 12.6 | 794.10 | 719.00 |
| Northern Mariana Islands | | | | | | | | | | | | | | |
| | 120 | 100.0 | 66.7 | 16.7 | 8.3 | b | 8.3 | b | b | b | b | b | 417.70 | 382.50 |
| Puerto Rico | 134,990 | 100.0 | 13.4 | 18.1 | 21.1 | 14.9 | 10.2 | 7.2 | 5.2 | 3.1 | 2.3 | 4.6 | 738.30 | 686.60 |
| Virgin Islands | 1,210 | 100.0 | 12.4 | 13.2 | 11.6 | 7.4 | 14.0 | 12.4 | 5.0 | 6.6 | 3.3 | 14.0 | 860.10 | 834.60 |
| Foreign countries | 12,290 | 100.0 | 26.1 | 11.5 | 12.0 | 10.4 | 9.4 | 5.7 | 5.8 | 5.1 | 4.1 | 9.8 | 738.00 | 701.60 |

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

- a. Includes beneficiaries with unknown state code.
- b. Base figure is too small to meet statistical standards for reliability of derived figures.

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5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J9—Percentage distribution of nondisabled widow(er)s, by state or other area and monthly benefit, December 2003

| State or area | Number | Percentage distribution by dollar amount of benefit | | | | | | | | | | | Monthly benefit (dollars) | |
|------------------------|-----------|---|-----------|---------|---------|---------|---------|---------|-----------|-----------|-----------|----------|---------------------------|--------|
| | | Total | Less than | 500.00– | 600.00– | 700.00– | 800.00– | 900.00– | 1,000.00– | 1,100.00– | 1,200.00– | 1,300.00 | Average | Median |
| | | | 500.00 | 599.90 | 699.90 | 799.90 | 899.90 | 999.90 | 1,099.90 | 1,199.90 | 1,299.90 | or more | | |
| All areas ^a | 4,499,900 | 100.0 | 11.5 | 6.4 | 8.9 | 11.2 | 13.0 | 14.7 | 12.0 | 8.3 | 5.4 | 8.6 | 888.30 | 893.00 |
| Alabama | 89,370 | 100.0 | 15.7 | 9.6 | 10.8 | 12.1 | 13.1 | 13.1 | 9.4 | 6.5 | 4.1 | 5.5 | 816.30 | 813.60 |
| Alaska | 4,500 | 100.0 | 16.4 | 7.6 | 7.8 | 11.6 | 13.1 | 15.3 | 11.1 | 7.6 | 4.7 | 4.9 | 836.30 | 846.30 |
| Arizona | 70,110 | 100.0 | 9.0 | 4.8 | 7.7 | 10.1 | 13.3 | 16.6 | 14.1 | 8.8 | 6.5 | 9.2 | 922.30 | 931.00 |
| Arkansas | 52,250 | 100.0 | 16.9 | 9.8 | 12.6 | 12.7 | 12.1 | 12.4 | 9.1 | 6.1 | 3.3 | 4.9 | 794.60 | 783.60 |
| California | 381,030 | 100.0 | 11.2 | 5.8 | 8.1 | 10.1 | 12.1 | 14.3 | 12.3 | 8.6 | 6.0 | 11.3 | 919.00 | 917.60 |
| Colorado | 51,680 | 100.0 | 11.5 | 6.0 | 8.4 | 11.3 | 12.5 | 14.4 | 12.8 | 8.2 | 5.7 | 9.2 | 894.00 | 901.60 |
| Connecticut | 46,640 | 100.0 | 5.7 | 3.5 | 6.6 | 9.7 | 13.2 | 16.0 | 13.6 | 10.6 | 7.9 | 13.3 | 983.30 | 968.60 |
| Delaware | 12,390 | 100.0 | 5.7 | 4.7 | 6.4 | 11.9 | 13.1 | 17.8 | 13.4 | 11.6 | 5.4 | 10.1 | 950.50 | 950.60 |
| District of Columbia | 6,550 | 100.0 | 29.2 | 13.1 | 10.1 | 10.8 | 9.5 | 8.4 | 6.1 | 4.0 | 2.1 | 6.7 | 728.90 | 669.00 |
| Florida | 279,250 | 100.0 | 8.9 | 5.7 | 8.5 | 11.8 | 13.9 | 15.4 | 12.4 | 8.3 | 5.6 | 9.6 | 915.00 | 907.60 |
| Georgia | 106,570 | 100.0 | 15.4 | 9.2 | 10.7 | 12.1 | 12.4 | 12.8 | 9.3 | 6.9 | 4.4 | 6.9 | 829.90 | 820.60 |
| Hawaii | 15,020 | 100.0 | 13.2 | 7.5 | 8.2 | 14.0 | 12.5 | 15.1 | 10.3 | 7.4 | 5.0 | 6.9 | 863.20 | 862.10 |
| Idaho | 18,290 | 100.0 | 7.1 | 6.3 | 9.0 | 11.8 | 15.4 | 16.6 | 13.4 | 8.4 | 4.9 | 7.0 | 902.30 | 902.60 |
| Illinois | 186,100 | 100.0 | 7.6 | 4.6 | 7.0 | 10.1 | 13.1 | 16.4 | 13.3 | 10.1 | 6.8 | 11.0 | 950.20 | 948.60 |
| Indiana | 99,120 | 100.0 | 5.3 | 4.1 | 6.8 | 10.8 | 14.7 | 18.2 | 15.0 | 10.0 | 6.2 | 8.8 | 946.80 | 947.60 |
| Iowa | 58,260 | 100.0 | 6.5 | 5.8 | 9.4 | 12.8 | 15.0 | 16.9 | 12.2 | 8.6 | 5.1 | 7.7 | 908.60 | 902.60 |
| Kansas | 44,070 | 100.0 | 6.9 | 5.6 | 8.5 | 11.2 | 13.4 | 15.0 | 12.8 | 9.2 | 6.9 | 10.6 | 940.50 | 931.60 |
| Kentucky | 83,640 | 100.0 | 17.2 | 9.2 | 10.8 | 11.8 | 12.5 | 13.5 | 9.7 | 6.5 | 4.2 | 4.7 | 804.70 | 809.10 |
| Louisiana | 95,370 | 100.0 | 16.7 | 8.8 | 11.2 | 12.3 | 11.9 | 12.3 | 10.5 | 6.1 | 4.0 | 6.3 | 816.00 | 808.60 |
| Maine | 23,830 | 100.0 | 12.5 | 7.5 | 11.0 | 13.9 | 14.2 | 12.4 | 11.4 | 6.4 | 5.2 | 5.5 | 842.40 | 839.60 |
| Maryland | 71,600 | 100.0 | 11.6 | 6.0 | 8.4 | 10.2 | 12.7 | 14.7 | 12.3 | 8.5 | 5.7 | 10.0 | 904.40 | 907.30 |
| Massachusetts | 91,780 | 100.0 | 10.6 | 5.5 | 7.8 | 10.6 | 13.0 | 14.4 | 12.2 | 8.9 | 6.3 | 10.9 | 921.90 | 916.60 |
| Michigan | 169,180 | 100.0 | 5.2 | 3.3 | 6.4 | 10.7 | 15.1 | 18.4 | 14.9 | 10.4 | 6.8 | 8.9 | 955.00 | 949.60 |
| Minnesota | 74,180 | 100.0 | 9.3 | 6.2 | 8.9 | 11.4 | 12.9 | 14.9 | 13.4 | 9.0 | 5.9 | 8.2 | 903.20 | 908.60 |
| Mississippi | 50,490 | 100.0 | 22.1 | 10.8 | 11.9 | 11.8 | 11.2 | 10.3 | 8.2 | 5.0 | 3.3 | 5.4 | 764.20 | 743.00 |
| Missouri | 96,240 | 100.0 | 9.9 | 6.4 | 9.4 | 12.1 | 13.7 | 15.2 | 12.2 | 8.2 | 5.5 | 7.4 | 887.40 | 889.00 |
| Montana | 15,900 | 100.0 | 9.0 | 6.5 | 9.9 | 13.6 | 15.2 | 15.7 | 11.7 | 6.9 | 4.2 | 7.3 | 880.00 | 873.30 |
| Nebraska | 28,770 | 100.0 | 7.2 | 6.6 | 10.7 | 12.7 | 14.1 | 14.4 | 11.9 | 7.8 | 5.5 | 9.2 | 908.90 | 890.60 |
| Nevada | 23,600 | 100.0 | 8.7 | 5.2 | 7.2 | 11.2 | 11.8 | 15.1 | 14.6 | 10.1 | 6.4 | 9.8 | 931.20 | 942.60 |
| New Hampshire | 16,450 | 100.0 | 6.6 | 4.1 | 8.4 | 11.2 | 12.5 | 17.5 | 14.0 | 10.3 | 5.3 | 10.1 | 939.60 | 941.60 |
| New Jersey | 118,660 | 100.0 | 5.7 | 3.6 | 7.1 | 10.0 | 12.5 | 15.9 | 14.0 | 10.6 | 7.7 | 12.8 | 979.50 | 970.60 |
| New Mexico | 27,150 | 100.0 | 16.4 | 8.6 | 11.2 | 11.1 | 12.4 | 13.0 | 9.5 | 7.0 | 4.7 | 6.1 | 822.50 | 826.00 |
| New York | 261,030 | 100.0 | 7.6 | 5.1 | 7.9 | 11.1 | 13.7 | 15.8 | 12.8 | 9.2 | 6.2 | 10.7 | 939.90 | 931.00 |
| North Carolina | 118,830 | 100.0 | 15.3 | 8.6 | 10.7 | 12.9 | 13.3 | 12.3 | 9.5 | 6.7 | 4.1 | 6.6 | 827.80 | 817.60 |
| North Dakota | 15,240 | 100.0 | 10.0 | 9.6 | 11.7 | 14.6 | 12.3 | 12.7 | 10.2 | 7.0 | 5.1 | 6.8 | 854.70 | 836.30 |
| Ohio | 226,270 | 100.0 | 9.0 | 4.8 | 7.3 | 10.1 | 13.6 | 17.0 | 13.9 | 9.7 | 6.1 | 8.5 | 919.60 | 933.00 |
| Oklahoma | 63,480 | 100.0 | 11.6 | 7.4 | 10.4 | 11.8 | 14.1 | 14.8 | 11.5 | 7.4 | 4.5 | 6.5 | 859.50 | 865.50 |
| Oregon | 53,190 | 100.0 | 6.7 | 4.5 | 8.1 | 11.2 | 14.2 | 16.7 | 14.4 | 9.5 | 5.8 | 9.0 | 932.60 | 933.00 |
| Pennsylvania | 254,870 | 100.0 | 5.9 | 4.3 | 8.1 | 11.4 | 14.9 | 17.6 | 14.1 | 9.6 | 5.8 | 8.3 | 933.10 | 933.60 |
| Rhode Island | 14,360 | 100.0 | 6.6 | 5.8 | 8.7 | 11.2 | 14.8 | 16.9 | 12.2 | 7.3 | 6.5 | 10.0 | 928.50 | 911.60 |
| South Carolina | 61,600 | 100.0 | 16.1 | 9.0 | 11.0 | 12.0 | 12.2 | 12.7 | 10.0 | 6.2 | 4.5 | 6.4 | 821.40 | 818.00 |
| South Dakota | 15,010 | 100.0 | 10.8 | 10.2 | 11.6 | 14.5 | 13.7 | 12.9 | 9.6 | 6.9 | 4.2 | 5.7 | 841.50 | 818.60 |
| Tennessee | 101,990 | 100.0 | 14.1 | 8.0 | 11.1 | 12.8 | 13.0 | 13.1 | 10.3 | 6.4 | 4.4 | 6.8 | 839.20 | 831.60 |
| Texas | 304,660 | 100.0 | 13.9 | 8.0 | 9.9 | 11.2 | 12.2 | 12.9 | 10.6 | 7.7 | 4.9 | 8.7 | 863.00 | 858.80 |
| Utah | 20,680 | 100.0 | 10.1 | 3.4 | 6.9 | 8.5 | 11.3 | 15.6 | 14.8 | 9.6 | 7.5 | 12.2 | 951.10 | 965.80 |
| Vermont | 9,290 | 100.0 | 9.8 | 8.6 | 9.1 | 10.1 | 14.2 | 14.2 | 12.8 | 7.8 | 5.4 | 8.0 | 887.30 | 889.60 |
| Virginia | 103,160 | 100.0 | 14.1 | 8.2 | 10.1 | 12.2 | 12.8 | 12.8 | 10.4 | 7.1 | 4.7 | 7.5 | 849.30 | 842.60 |
| Washington | 76,650 | 100.0 | 6.7 | 4.2 | 6.9 | 10.7 | 13.5 | 17.0 | 14.4 | 9.9 | 6.5 | 10.2 | 949.30 | 948.60 |
| West Virginia | 50,550 | 100.0 | 10.6 | 7.6 | 11.3 | 11.9 | 14.6 | 15.8 | 11.6 | 7.5 | 4.7 | 4.4 | 849.40 | 860.60 |
| Wisconsin | 86,310 | 100.0 | 5.8 | 4.3 | 7.9 | 11.4 | 14.2 | 18.2 | 15.0 | 9.3 | 6.0 | 8.0 | 934.40 | 937.60 |
| Wyoming | 6,540 | 100.0 | 7.0 | 5.8 | 10.4 | 11.2 | 12.1 | 15.4 | 14.5 | 9.2 | 5.5 | 8.9 | 919.40 | 929.10 |

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J9—Percentage distribution of nondisabled widow(er)s, by state or other area and monthly benefit, December 2003—Continued

| State or area | Number | Percentage distribution by dollar amount of benefit | | | | | | | | | | | Monthly benefit (dollars) | |
|--------------------------|--------|---|------------------|---------------|---------------|---------------|---------------|---------------|-------------------|-------------------|-------------------|------------------|---------------------------|--------|
| | | Total | Less than 500.00 | 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 | 1,200.00–1,299.90 | 1,300.00 or more | Average | Median |
| Outlying areas | | | | | | | | | | | | | | |
| American Samoa | 420 | 100.0 | 64.3 | 9.5 | 2.4 | 4.8 | 7.1 | 2.4 | 2.4 | b | b | 7.1 | 516.40 | 407.50 |
| Guam | 900 | 100.0 | 34.4 | 15.6 | 15.6 | 15.6 | 3.3 | 6.7 | 2.2 | 1.1 | 2.2 | 3.3 | 635.70 | 594.10 |
| Northern Mariana Islands | | | | | | | | | | | | | | |
| Northern Mariana Islands | 160 | 100.0 | 75.0 | 18.8 | 6.3 | b | b | b | b | b | b | b | 394.40 | 358.80 |
| Puerto Rico | 71,140 | 100.0 | 51.0 | 14.6 | 10.9 | 8.3 | 5.7 | 3.7 | 2.1 | 1.4 | 0.9 | 1.4 | 544.40 | 495.60 |
| Virgin Islands | 1,060 | 100.0 | 29.2 | 15.1 | 13.2 | 10.4 | 6.6 | 8.5 | 6.6 | 6.6 | 1.9 | 1.9 | 689.80 | 644.10 |
| Foreign countries | 73,840 | 100.0 | 41.7 | 14.6 | 12.0 | 9.2 | 7.2 | 5.6 | 3.7 | 2.2 | 1.4 | 2.5 | 588.50 | 558.00 |

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

- a. Includes beneficiaries with unknown state code.
- b. Base figure is too small to meet statistical standards for reliability of derived figures.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J10—Number of children, by state or other area and type of benefit, December 2003

| State or area | Total | Children under age 18 of— | | | | Disabled adult children of— | | | | Students aged 18–19 of— | | | |
|------------------------|-----------|---------------------------|-----------------|------------------|------------------|-----------------------------|-----------------|------------------|------------------|-------------------------|-----------------|------------------|------------------|
| | | Subtotal | Retired workers | Disabled workers | Deceased workers | Subtotal | Retired workers | Disabled workers | Deceased workers | Subtotal | Retired workers | Disabled workers | Deceased workers |
| All areas ^a | 3,966,480 | 3,081,260 | 273,330 | 1,468,110 | 1,339,820 | 757,200 | 192,750 | 63,480 | 500,970 | 128,020 | 14,410 | 47,720 | 65,890 |
| Alabama | 94,770 | 74,270 | 5,660 | 39,220 | 29,390 | 16,890 | 3,560 | 1,850 | 11,480 | 3,610 | 420 | 1,680 | 1,510 |
| Alaska | 8,510 | 7,500 | 840 | 2,660 | 4,000 | 780 | 230 | 50 | 500 | 230 | 30 | 80 | 120 |
| Arizona | 67,640 | 56,230 | 4,960 | 26,770 | 24,500 | 9,010 | 2,480 | 970 | 5,560 | 2,400 | 260 | 960 | 1,180 |
| Arkansas | 52,420 | 41,510 | 3,070 | 22,100 | 16,340 | 8,970 | 1,930 | 1,080 | 5,960 | 1,940 | 230 | 760 | 950 |
| California | 348,050 | 279,820 | 32,930 | 117,310 | 129,580 | 61,540 | 19,390 | 4,560 | 37,590 | 6,690 | 1,000 | 2,120 | 3,570 |
| Colorado | 43,190 | 35,520 | 2,890 | 15,700 | 16,930 | 6,140 | 1,690 | 630 | 3,820 | 1,530 | 200 | 580 | 750 |
| Connecticut | 42,040 | 31,660 | 2,720 | 15,880 | 13,060 | 9,450 | 2,600 | 560 | 6,290 | 930 | 80 | 330 | 520 |
| Delaware | 11,650 | 9,430 | 830 | 4,610 | 3,990 | 1,890 | 590 | 150 | 1,150 | 330 | 60 | 150 | 120 |
| District of Columbia | 6,400 | 4,660 | 530 | 1,160 | 2,970 | 1,560 | 250 | 60 | 1,250 | 180 | 10 | 10 | 160 |
| Florida | 234,750 | 192,490 | 21,930 | 86,460 | 84,100 | 33,830 | 9,110 | 2,980 | 21,740 | 8,430 | 1,140 | 2,880 | 4,410 |
| Georgia | 122,690 | 97,700 | 6,970 | 44,470 | 46,260 | 20,560 | 4,080 | 1,970 | 14,510 | 4,430 | 490 | 1,470 | 2,470 |
| Hawaii | 13,630 | 11,090 | 1,840 | 4,430 | 4,820 | 2,320 | 760 | 100 | 1,460 | 220 | 30 | 30 | 160 |
| Idaho | 16,600 | 13,610 | 1,050 | 6,270 | 6,290 | 2,540 | 670 | 140 | 1,730 | 450 | 30 | 230 | 190 |
| Illinois | 154,980 | 117,620 | 11,120 | 51,790 | 54,710 | 32,050 | 7,620 | 2,360 | 22,070 | 5,310 | 600 | 1,820 | 2,890 |
| Indiana | 86,700 | 65,350 | 4,590 | 33,050 | 27,710 | 17,450 | 3,950 | 1,560 | 11,940 | 3,900 | 420 | 1,470 | 2,010 |
| Iowa | 34,650 | 24,840 | 1,510 | 12,370 | 10,960 | 8,610 | 2,260 | 640 | 5,710 | 1,200 | 110 | 610 | 480 |
| Kansas | 32,800 | 25,460 | 1,510 | 12,280 | 11,670 | 6,030 | 1,690 | 430 | 3,910 | 1,310 | 130 | 520 | 660 |
| Kentucky | 79,750 | 61,290 | 3,330 | 37,410 | 20,550 | 15,990 | 3,350 | 2,170 | 10,470 | 2,470 | 170 | 1,190 | 1,110 |
| Louisiana | 88,570 | 67,300 | 5,580 | 32,100 | 29,620 | 17,990 | 4,040 | 1,880 | 12,070 | 3,280 | 250 | 1,150 | 1,880 |
| Maine | 22,650 | 17,030 | 1,170 | 11,050 | 4,810 | 4,620 | 1,210 | 500 | 2,910 | 1,000 | 110 | 570 | 320 |
| Maryland | 64,240 | 52,180 | 4,450 | 18,720 | 29,010 | 11,060 | 2,730 | 570 | 7,760 | 1,000 | 60 | 270 | 670 |
| Massachusetts | 83,710 | 63,330 | 4,910 | 36,600 | 21,820 | 18,140 | 5,030 | 1,530 | 11,580 | 2,240 | 240 | 800 | 1,200 |
| Michigan | 149,510 | 112,490 | 8,690 | 56,480 | 47,320 | 32,210 | 8,200 | 2,590 | 21,420 | 4,810 | 490 | 1,920 | 2,400 |
| Minnesota | 51,160 | 37,150 | 2,430 | 17,820 | 16,900 | 12,030 | 3,630 | 670 | 7,730 | 1,980 | 180 | 840 | 960 |
| Mississippi | 70,730 | 56,350 | 4,710 | 29,130 | 22,510 | 11,560 | 2,290 | 1,490 | 7,780 | 2,820 | 320 | 1,100 | 1,400 |
| Missouri | 91,870 | 71,990 | 5,020 | 36,540 | 30,430 | 16,110 | 3,840 | 1,580 | 10,690 | 3,770 | 170 | 1,640 | 1,960 |
| Montana | 12,630 | 10,090 | 1,040 | 4,290 | 4,760 | 2,050 | 540 | 160 | 1,350 | 490 | 60 | 140 | 290 |
| Nebraska | 20,190 | 15,590 | 840 | 7,820 | 6,930 | 3,910 | 1,360 | 200 | 2,350 | 690 | 90 | 200 | 400 |
| Nevada | 24,540 | 21,690 | 2,590 | 9,710 | 9,390 | 2,350 | 610 | 280 | 1,460 | 500 | 100 | 190 | 210 |
| New Hampshire | 18,270 | 14,530 | 880 | 8,290 | 5,360 | 3,120 | 780 | 230 | 2,110 | 620 | 60 | 350 | 210 |
| New Jersey | 100,750 | 78,080 | 7,150 | 35,710 | 35,220 | 19,500 | 5,600 | 1,130 | 12,770 | 3,170 | 430 | 990 | 1,750 |
| New Mexico | 29,420 | 23,950 | 2,270 | 10,210 | 11,470 | 4,290 | 1,260 | 390 | 2,640 | 1,180 | 140 | 350 | 690 |
| New York | 249,870 | 188,270 | 20,220 | 97,010 | 71,040 | 56,310 | 14,790 | 3,730 | 37,790 | 5,290 | 810 | 2,040 | 2,440 |
| North Carolina | 128,340 | 100,780 | 5,910 | 52,810 | 42,060 | 23,430 | 4,950 | 2,620 | 15,860 | 4,130 | 410 | 1,820 | 1,900 |
| North Dakota | 6,990 | 4,600 | 290 | 2,240 | 2,070 | 2,030 | 440 | 140 | 1,450 | 360 | 30 | 130 | 200 |
| Ohio | 148,270 | 106,270 | 7,940 | 51,910 | 46,420 | 36,280 | 9,110 | 2,650 | 24,520 | 5,720 | 560 | 2,090 | 3,070 |
| Oklahoma | 52,450 | 40,500 | 3,380 | 17,000 | 20,120 | 9,320 | 1,970 | 880 | 6,470 | 2,630 | 300 | 760 | 1,570 |
| Oregon | 39,490 | 30,880 | 3,210 | 13,600 | 14,070 | 7,410 | 2,140 | 610 | 4,660 | 1,200 | 110 | 400 | 690 |
| Pennsylvania | 169,520 | 124,770 | 9,090 | 62,680 | 53,000 | 39,150 | 9,440 | 3,170 | 26,540 | 5,600 | 580 | 2,230 | 2,790 |
| Rhode Island | 14,410 | 10,790 | 660 | 6,300 | 3,830 | 3,330 | 750 | 300 | 2,280 | 290 | 40 | 70 | 180 |
| South Carolina | 73,260 | 57,410 | 3,720 | 29,180 | 24,510 | 13,660 | 2,780 | 1,280 | 9,600 | 2,190 | 200 | 780 | 1,210 |
| South Dakota | 10,580 | 7,820 | 510 | 3,340 | 3,970 | 2,220 | 490 | 140 | 1,590 | 540 | 60 | 150 | 330 |
| Tennessee | 101,180 | 78,550 | 5,130 | 39,920 | 33,500 | 18,860 | 3,980 | 1,800 | 13,080 | 3,770 | 330 | 1,600 | 1,840 |
| Texas | 260,080 | 208,990 | 20,130 | 82,800 | 106,060 | 40,390 | 10,690 | 3,130 | 26,570 | 10,700 | 1,350 | 3,410 | 5,940 |
| Utah | 24,240 | 20,150 | 1,460 | 7,710 | 10,980 | 3,300 | 1,210 | 230 | 1,860 | 790 | 110 | 260 | 420 |
| Vermont | 9,060 | 6,910 | 640 | 4,000 | 2,270 | 1,890 | 500 | 240 | 1,150 | 260 | 50 | 80 | 130 |
| Virginia | 94,060 | 73,640 | 5,140 | 37,390 | 31,110 | 17,790 | 3,930 | 1,570 | 12,290 | 2,630 | 230 | 1,050 | 1,350 |
| Washington | 62,350 | 48,160 | 4,310 | 21,630 | 22,220 | 11,730 | 3,340 | 940 | 7,450 | 2,460 | 290 | 910 | 1,260 |
| West Virginia | 38,580 | 26,770 | 1,810 | 16,490 | 8,470 | 10,330 | 1,910 | 1,110 | 7,310 | 1,480 | 170 | 660 | 650 |
| Wisconsin | 63,520 | 45,340 | 3,220 | 22,780 | 19,340 | 15,720 | 4,190 | 1,180 | 10,350 | 2,460 | 310 | 970 | 1,180 |
| Wyoming | 6,280 | 5,140 | 280 | 2,220 | 2,640 | 860 | 200 | 110 | 550 | 280 | 0 | 80 | 200 |

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J10—Number of children, by state or other area and type of benefit, December 2003—Continued

| State or area | Total | Children under age 18 of— | | | | Disabled adult children of— | | | | Students aged 18–19 of— | | | |
|--------------------------|---------|---------------------------|-----------------|------------------|------------------|-----------------------------|-----------------|------------------|------------------|-------------------------|-----------------|------------------|------------------|
| | | Subtotal | Retired workers | Disabled workers | Deceased workers | Subtotal | Retired workers | Disabled workers | Deceased workers | Subtotal | Retired workers | Disabled workers | Deceased workers |
| Outlying areas | | | | | | | | | | | | | |
| American Samoa | 2,170 | 2,090 | 380 | 770 | 940 | 40 | 0 | 10 | 30 | 40 | 10 | 20 | 10 |
| Guam | 2,460 | 2,260 | 540 | 430 | 1,290 | 110 | 30 | 30 | 50 | 90 | 30 | 10 | 50 |
| Northern Mariana Islands | 650 | 560 | 260 | 20 | 280 | 70 | 20 | 0 | 50 | 20 | 20 | 0 | 0 |
| Puerto Rico | 100,510 | 76,080 | 8,410 | 43,710 | 23,960 | 22,950 | 6,890 | 2,090 | 13,970 | 1,480 | 140 | 730 | 610 |
| Virgin Islands | 1,860 | 1,420 | 320 | 450 | 650 | 380 | 160 | 10 | 210 | 60 | 20 | 20 | 20 |
| Foreign countries | 25,570 | 20,230 | 6,220 | 2,980 | 11,030 | 4,910 | 1,420 | 40 | 3,450 | 430 | 140 | 40 | 250 |

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

a. Includes beneficiaries with unknown state code.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J11—Number and total monthly benefits for beneficiaries in foreign countries, December 2003

| Region and country ^a | Number | | | | | | Total monthly benefits (thousands of dollars) | |
|---------------------------------|-------------------|-----------------|------------------|-------------------------|--------------------|----------|--|-----------------|
| | All beneficiaries | Retired workers | Disabled workers | Widow(er)s ^b | Wives and husbands | Children | All beneficiaries | Retired workers |
| All countries | 423,062 | 248,012 | 12,474 | 77,772 | 60,363 | 24,441 | 211,538 | 132,725 |
| Canada | 96,810 | 55,848 | 2,543 | 17,856 | 17,945 | 2,618 | 41,212 | 25,352 |
| Mexico | 48,328 | 23,302 | 1,366 | 12,261 | 5,656 | 5,743 | 23,386 | 12,315 |
| Central America and Caribbean | 21,288 | 14,675 | 1,136 | 2,013 | 1,333 | 2,131 | 13,561 | 9,921 |
| Barbados | 1,060 | 873 | 25 | 89 | 56 | 17 | 765 | 643 |
| Costa Rica | 3,171 | 2,116 | 212 | 323 | 204 | 316 | 2,281 | 1,626 |
| Dominican Republic | 6,106 | 3,869 | 458 | 430 | 376 | 973 | 3,425 | 2,344 |
| El Salvador | 853 | 583 | 57 | 77 | 55 | 81 | 490 | 346 |
| Guatemala | 1,164 | 769 | 56 | 133 | 69 | 137 | 706 | 488 |
| Honduras | 923 | 578 | 55 | 83 | 58 | 149 | 621 | 425 |
| Jamaica | 2,734 | 2,159 | 66 | 230 | 184 | 95 | 1,755 | 1,442 |
| Panama | 955 | 579 | 60 | 147 | 63 | 106 | 625 | 400 |
| Trinidad and Tobago | 849 | 664 | 28 | 81 | 47 | 29 | 609 | 486 |
| South America | 13,540 | 9,057 | 513 | 1,954 | 1,217 | 799 | 8,358 | 5,839 |
| Argentina | 2,959 | 1,853 | 57 | 525 | 414 | 110 | 1,756 | 1,182 |
| Brazil | 1,808 | 1,050 | 60 | 380 | 188 | 130 | 1,184 | 720 |
| Chile | 1,200 | 789 | 43 | 189 | 107 | 72 | 806 | 556 |
| Colombia | 2,858 | 2,040 | 148 | 321 | 157 | 192 | 1,733 | 1,264 |
| Ecuador | 2,230 | 1,614 | 110 | 213 | 137 | 156 | 1,315 | 981 |
| Peru | 796 | 533 | 37 | 114 | 64 | 48 | 513 | 360 |
| Uruguay | 681 | 508 | 30 | 62 | 70 | 11 | 397 | 310 |
| Africa | 1,717 | 994 | 122 | 205 | 116 | 280 | 1,114 | 723 |
| Asia | 42,198 | 20,947 | 1,414 | 9,302 | 5,015 | 5,520 | 24,846 | 14,379 |
| Cyprus | 522 | 310 | 20 | 105 | 56 | 31 | 304 | 195 |
| Hong Kong | 846 | 439 | 10 | 281 | 78 | 38 | 488 | 283 |
| India | 713 | 485 | 43 | 61 | 62 | 62 | 474 | 330 |
| Israel | 8,363 | 4,716 | 207 | 1,298 | 1,277 | 865 | 5,227 | 3,431 |
| Japan | 6,924 | 3,431 | 36 | 1,773 | 1,437 | 247 | 4,600 | 2,633 |
| Philippines | 18,688 | 8,371 | 682 | 5,182 | 1,665 | 2,788 | 10,056 | 5,201 |
| Thailand | 1,131 | 804 | 96 | 58 | 28 | 145 | 908 | 673 |
| Turkey | 649 | 400 | 31 | 120 | 66 | 32 | 433 | 284 |
| Yemen | 1,583 | 442 | 102 | 130 | 85 | 824 | 679 | 295 |
| Europe | 192,433 | 118,941 | 5,200 | 33,198 | 28,175 | 6,919 | 94,753 | 61,225 |
| Austria | 2,323 | 1,478 | 82 | 404 | 283 | 76 | 1,167 | 763 |
| Belgium | 1,629 | 1,017 | 18 | 271 | 268 | 55 | 819 | 538 |
| Croatia | 1,471 | 834 | 151 | 276 | 111 | 99 | 1,017 | 605 |
| Denmark | 878 | 520 | 11 | 199 | 102 | 46 | 592 | 359 |
| Finland | 760 | 496 | 28 | 128 | 83 | 25 | 433 | 279 |
| France | 9,911 | 6,414 | 102 | 1,500 | 1,597 | 298 | 5,138 | 3,569 |
| Germany | 30,659 | 18,889 | 816 | 4,942 | 4,656 | 1,356 | 13,316 | 8,095 |
| Greece | 22,394 | 13,027 | 727 | 4,403 | 3,446 | 791 | 10,889 | 6,801 |
| Hungary | 1,804 | 1,360 | 106 | 188 | 94 | 56 | 1,418 | 1,115 |
| Ireland | 8,093 | 5,490 | 220 | 1,088 | 941 | 354 | 4,680 | 3,407 |
| Italy | 34,223 | 20,080 | 753 | 7,642 | 4,731 | 1,017 | 16,772 | 10,418 |
| Malta | 590 | 315 | 35 | 135 | 62 | 43 | 387 | 219 |
| Netherlands | 4,083 | 2,567 | 60 | 590 | 721 | 145 | 1,780 | 1,165 |
| Norway | 6,169 | 3,589 | 132 | 1,188 | 1,096 | 164 | 2,402 | 1,430 |
| Poland | 4,540 | 3,039 | 244 | 697 | 390 | 170 | 2,500 | 1,642 |

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J11—Number and total monthly benefits for beneficiaries in foreign countries, December 2003—Continued

| Region and country ^a | Number | | | | | | Total monthly benefits (thousands of dollars) | |
|---------------------------------|----------------------|--------------------|---------------------|-------------------------|-----------------------|----------|--|--------------------|
| | All beneficiaries | Retired workers | Disabled workers | Widow(er)s ^b | Wives and husbands | Children | All beneficiaries | Retired workers |
| Portugal | 11,932 | 8,029 | 703 | 1,547 | 1,250 | 403 | 5,963 | 4,155 |
| Serbia | 959 | 557 | 66 | 228 | 75 | 33 | 622 | 355 |
| Spain | 9,427 | 5,541 | 243 | 1,878 | 1,436 | 329 | 5,046 | 3,211 |
| Sweden | 3,062 | 2,022 | 59 | 407 | 467 | 107 | 1,343 | 881 |
| Switzerland | 5,889 | 3,979 | 49 | 663 | 1,068 | 130 | 2,330 | 1,624 |
| United Kingdom | 28,607 | 17,705 | 456 | 4,356 | 4,990 | 1,100 | 14,117 | 9,190 |
| Oceania | 6,748 | 4,248 | 180 | 983 | 906 | 431 | 4,307 | 2,971 |
| Australia | 5,481 | 3,454 | 113 | 857 | 806 | 251 | 3,447 | 2,364 |
| New Zealand | 871 | 599 | 35 | 84 | 77 | 76 | 620 | 465 |

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

- a. Countries with 500 or more beneficiaries are shown separately. The total and continent subtotals include all foreign residents.
b. Includes nondisabled and disabled widow(er)s, widowed mothers and fathers, and parents.

CONTACT: Rona Blumenthal (410) 965-0163 or Shirley Turpin (410) 965-0181

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J14—Number, average monthly benefit, and median monthly benefit, by state or other area and type of disabled beneficiary, December 2003

| State or area | All disabled beneficiaries | | | Disabled workers | | | Disabled adult children | | | Disabled widow(er)s | | |
|------------------------|----------------------------|-----------------------------------|----------------------------------|------------------|-----------------------------------|----------------------------------|-------------------------|-----------------------------------|----------------------------------|---------------------|-----------------------------------|----------------------------------|
| | Number | Average monthly benefit (dollars) | Median monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Median monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Median monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Median monthly benefit (dollars) |
| All areas ^a | 6,832,290 | 820.00 | 757.60 | 5,867,460 | 861.70 | 799.60 | 757,200 | 567.10 | 558.00 | 207,630 | 562.30 | 538.00 |
| Alabama | 171,730 | 790.20 | 728.00 | 148,620 | 831.80 | 765.00 | 16,890 | 508.80 | 479.00 | 6,220 | 557.80 | 544.00 |
| Alaska | 9,770 | 820.00 | 740.00 | 8,810 | 843.80 | 756.00 | 780 | 600.80 | 593.00 | 180 | 601.00 | 606.50 |
| Arizona | 118,190 | 859.40 | 799.60 | 105,940 | 890.40 | 830.00 | 9,010 | 586.60 | 579.00 | 3,240 | 601.00 | 595.00 |
| Arkansas | 103,100 | 774.60 | 723.60 | 90,170 | 815.20 | 765.60 | 8,970 | 495.00 | 469.00 | 3,960 | 482.00 | 474.50 |
| California | 579,880 | 838.80 | 774.60 | 504,560 | 875.80 | 814.60 | 61,540 | 589.40 | 589.00 | 13,780 | 601.00 | 572.00 |
| Colorado | 74,700 | 825.00 | 765.00 | 66,740 | 854.80 | 798.60 | 6,140 | 588.60 | 590.50 | 1,820 | 534.00 | 505.00 |
| Connecticut | 70,660 | 851.60 | 784.60 | 59,530 | 893.60 | 826.00 | 9,450 | 633.60 | 642.00 | 1,680 | 586.00 | 554.50 |
| Delaware | 20,720 | 865.20 | 787.30 | 18,350 | 901.00 | 835.60 | 1,890 | 597.20 | 568.00 | 480 | 551.20 | 589.00 |
| District of Columbia | 10,660 | 747.60 | 697.30 | 8,850 | 796.20 | 738.00 | 1,560 | 511.20 | 479.30 | 250 | 499.60 | 416.00 |
| Florida | 404,330 | 830.00 | 771.00 | 359,840 | 863.20 | 803.60 | 33,830 | 568.00 | 558.60 | 10,660 | 538.20 | 503.30 |
| Georgia | 208,180 | 802.60 | 750.60 | 180,490 | 845.00 | 788.60 | 20,560 | 532.20 | 508.00 | 7,130 | 510.00 | 468.00 |
| Hawaii | 19,510 | 834.00 | 766.60 | 16,790 | 878.00 | 819.60 | 2,320 | 556.20 | 558.30 | 400 | 596.80 | 573.00 |
| Idaho | 29,010 | 815.00 | 752.00 | 25,690 | 844.20 | 782.00 | 2,540 | 580.40 | 563.50 | 780 | 618.40 | 602.00 |
| Illinois | 240,030 | 848.00 | 783.00 | 200,490 | 894.00 | 834.00 | 32,050 | 619.40 | 623.00 | 7,490 | 595.00 | 589.00 |
| Indiana | 149,100 | 828.80 | 763.60 | 126,820 | 867.80 | 802.60 | 17,450 | 608.00 | 616.60 | 4,830 | 601.60 | 598.00 |
| Iowa | 65,830 | 789.60 | 730.00 | 55,450 | 827.80 | 771.00 | 8,610 | 590.20 | 575.00 | 1,770 | 560.40 | 546.00 |
| Kansas | 55,530 | 797.60 | 735.60 | 48,000 | 832.20 | 772.60 | 6,030 | 581.20 | 569.00 | 1,500 | 561.80 | 517.00 |
| Kentucky | 166,880 | 804.60 | 739.00 | 144,060 | 848.20 | 786.00 | 15,990 | 507.80 | 476.60 | 6,830 | 578.20 | 557.00 |
| Louisiana | 127,640 | 794.80 | 732.30 | 103,980 | 855.40 | 793.80 | 17,990 | 505.20 | 469.00 | 5,670 | 605.80 | 566.00 |
| Maine | 47,090 | 756.40 | 710.60 | 41,390 | 787.40 | 736.00 | 4,620 | 533.00 | 530.30 | 1,080 | 528.80 | 513.50 |
| Maryland | 95,180 | 855.20 | 795.80 | 81,690 | 896.60 | 838.60 | 11,060 | 604.80 | 589.30 | 2,430 | 604.00 | 597.00 |
| Massachusetts | 161,720 | 812.40 | 750.00 | 140,000 | 849.40 | 785.00 | 18,140 | 583.40 | 579.30 | 3,580 | 532.20 | 506.00 |
| Michigan | 255,620 | 873.40 | 808.00 | 215,210 | 918.80 | 861.00 | 32,210 | 635.80 | 653.00 | 8,200 | 619.00 | 597.00 |
| Minnesota | 93,860 | 807.40 | 742.00 | 80,110 | 846.80 | 784.00 | 12,030 | 580.20 | 579.60 | 1,720 | 553.20 | 528.00 |
| Mississippi | 114,400 | 759.40 | 712.00 | 98,230 | 805.60 | 751.00 | 11,560 | 463.00 | 435.00 | 4,610 | 516.20 | 477.00 |
| Missouri | 166,530 | 805.20 | 742.00 | 144,970 | 841.20 | 778.00 | 16,110 | 566.80 | 556.00 | 5,450 | 554.00 | 519.00 |
| Montana | 21,390 | 797.60 | 740.00 | 18,770 | 832.40 | 780.00 | 2,050 | 564.80 | 563.60 | 570 | 486.60 | 435.00 |
| Nebraska | 34,670 | 785.40 | 716.00 | 30,090 | 819.20 | 746.00 | 3,910 | 566.40 | 559.00 | 670 | 540.20 | 515.00 |
| Nevada | 43,540 | 906.00 | 859.00 | 40,060 | 930.60 | 878.60 | 2,350 | 620.40 | 625.00 | 1,130 | 630.00 | 596.00 |
| New Hampshire | 31,850 | 830.60 | 764.90 | 28,010 | 862.80 | 798.00 | 3,120 | 603.60 | 598.00 | 720 | 562.60 | 550.00 |
| New Jersey | 165,340 | 894.00 | 829.60 | 141,810 | 938.40 | 880.00 | 19,500 | 635.20 | 640.00 | 4,030 | 586.80 | 541.60 |
| New Mexico | 43,950 | 787.60 | 731.00 | 38,530 | 826.40 | 768.60 | 4,290 | 493.00 | 469.00 | 1,130 | 582.40 | 568.00 |
| New York | 435,820 | 862.40 | 791.60 | 367,160 | 910.60 | 848.60 | 56,310 | 613.20 | 615.00 | 12,350 | 564.60 | 539.00 |
| North Carolina | 257,430 | 800.40 | 756.60 | 225,420 | 842.20 | 794.60 | 23,430 | 522.20 | 502.00 | 8,580 | 460.00 | 430.00 |
| North Dakota | 12,750 | 761.80 | 688.60 | 10,410 | 813.80 | 754.60 | 2,030 | 527.20 | 488.00 | 310 | 553.80 | 535.00 |
| Ohio | 263,780 | 806.40 | 741.60 | 218,660 | 848.40 | 785.60 | 36,280 | 600.80 | 599.80 | 8,840 | 610.20 | 603.30 |
| Oklahoma | 91,150 | 807.60 | 751.60 | 78,980 | 846.40 | 793.00 | 9,320 | 554.20 | 534.00 | 2,850 | 563.60 | 540.00 |
| Oregon | 78,600 | 827.60 | 763.00 | 69,030 | 856.80 | 793.60 | 7,410 | 620.40 | 623.00 | 2,160 | 601.60 | 601.00 |
| Pennsylvania | 308,170 | 831.80 | 769.00 | 259,270 | 875.80 | 819.00 | 39,150 | 599.80 | 601.00 | 9,750 | 591.40 | 590.00 |
| Rhode Island | 30,260 | 812.20 | 749.30 | 26,200 | 846.60 | 785.80 | 3,330 | 591.00 | 592.00 | 730 | 587.00 | 568.00 |
| South Carolina | 136,200 | 803.40 | 759.00 | 117,630 | 850.00 | 802.60 | 13,660 | 514.20 | 488.50 | 4,910 | 487.00 | 455.00 |
| South Dakota | 15,790 | 756.80 | 703.60 | 13,220 | 798.20 | 738.60 | 2,220 | 541.20 | 533.00 | 350 | 567.20 | 574.00 |
| Tennessee | 189,530 | 787.20 | 734.00 | 163,300 | 829.20 | 772.00 | 18,860 | 526.80 | 502.00 | 7,370 | 525.00 | 513.00 |
| Texas | 375,070 | 808.80 | 751.60 | 320,980 | 853.60 | 797.00 | 40,390 | 535.60 | 512.00 | 13,700 | 566.00 | 545.50 |
| Utah | 29,640 | 816.00 | 744.80 | 25,670 | 852.80 | 778.60 | 3,300 | 579.80 | 567.50 | 670 | 570.00 | 535.00 |
| Vermont | 16,960 | 781.80 | 727.60 | 14,550 | 824.60 | 772.00 | 1,890 | 528.60 | 534.00 | 520 | 505.60 | 537.50 |
| Virginia | 170,870 | 820.20 | 761.00 | 147,530 | 863.60 | 806.60 | 17,790 | 543.60 | 523.60 | 5,550 | 554.40 | 534.00 |
| Washington | 122,520 | 845.80 | 780.00 | 107,660 | 876.80 | 813.00 | 11,730 | 620.40 | 636.00 | 3,130 | 621.20 | 611.00 |
| West Virginia | 86,230 | 846.20 | 779.00 | 72,720 | 900.80 | 844.80 | 10,330 | 531.60 | 513.00 | 3,180 | 618.00 | 607.30 |
| Wisconsin | 114,910 | 820.20 | 756.00 | 96,780 | 860.00 | 797.80 | 15,720 | 612.80 | 617.00 | 2,410 | 571.00 | 568.00 |
| Wyoming | 9,790 | 837.20 | 742.00 | 8,760 | 868.80 | 790.80 | 860 | 564.40 | 548.50 | 170 | 586.00 | 538.00 |

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J14—Number, average monthly benefit, and median monthly benefit, by state or other area and type of disabled beneficiary, December 2003—Continued

| State or area | All disabled beneficiaries | | | Disabled workers | | | Disabled adult children | | | Disabled widow(er)s | | |
|--------------------------|----------------------------|-----------------------------------|----------------------------------|------------------|-----------------------------------|----------------------------------|-------------------------|-----------------------------------|----------------------------------|---------------------|-----------------------------------|----------------------------------|
| | Number | Average monthly benefit (dollars) | Median monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Median monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Median monthly benefit (dollars) | Number | Average monthly benefit (dollars) | Median monthly benefit (dollars) |
| Outlying areas | | | | | | | | | | | | |
| American Samoa | 1,310 | 648.00 | 597.60 | 1,230 | 653.20 | 609.60 | 40 | 471.60 | 457.80 | 40 | 666.60 | 627.30 |
| Guam | 1,230 | 754.20 | 690.60 | 1,110 | 794.00 | 719.00 | 110 | 381.00 | 362.60 | 10 | 423.00 | 423.00 |
| Northern Mariana Islands | 190 | 378.60 | 306.00 | 120 | 417.60 | 382.50 | 70 | 311.60 | 218.00 | 0 | ... | ... |
| Puerto Rico | 163,040 | 676.80 | 646.60 | 134,990 | 738.40 | 686.60 | 22,950 | 361.20 | 337.60 | 5,100 | 471.80 | 445.10 |
| Virgin Islands | 1,660 | 761.20 | 730.60 | 1,210 | 860.00 | 834.60 | 380 | 473.00 | 418.10 | 70 | 613.80 | 592.60 |
| Foreign countries | 18,070 | 638.00 | 596.00 | 12,290 | 738.00 | 701.60 | 4,910 | 407.60 | 375.00 | 870 | 525.40 | 501.00 |

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.

a. Includes beneficiaries with unknown state code.

CONTACT: Joseph Bondar (410) 965-0162 or Shirley Turpin (410) 965-0181.

Table 5.K1—Number and percentage of beneficiaries and average monthly benefit, by state or other area and direct deposit status, December 2003

| State or area | All beneficiaries | | Beneficiaries using direct deposit | | | Beneficiaries not using direct deposit | | |
|----------------------|-------------------|-----------------------------------|------------------------------------|---------------------------------|-----------------------------------|--|---------------------------------|-----------------------------------|
| | Number | Average monthly benefit (dollars) | Number | Percentage of all beneficiaries | Average monthly benefit (dollars) | Number | Percentage of all beneficiaries | Average monthly benefit (dollars) |
| All areas | 47,053,140 | 840.60 | 38,246,730 | 81.3 | 873.60 | 8,806,410 | 18.7 | 697.30 |
| Alabama | 869,760 | 784.30 | 650,150 | 74.8 | 830.20 | 219,610 | 25.2 | 648.30 |
| Alaska | 61,070 | 791.70 | 49,300 | 80.7 | 822.20 | 11,770 | 19.3 | 664.40 |
| Arizona | 858,500 | 861.10 | 764,130 | 89.0 | 887.30 | 94,370 | 11.0 | 648.30 |
| Arkansas | 537,180 | 769.10 | 415,330 | 77.3 | 808.30 | 121,850 | 22.7 | 635.60 |
| California | 4,358,850 | 848.90 | 3,766,230 | 86.4 | 870.70 | 592,620 | 13.6 | 710.00 |
| Colorado | 559,130 | 830.90 | 476,860 | 85.3 | 854.60 | 82,270 | 14.7 | 693.00 |
| Connecticut | 583,220 | 935.90 | 464,830 | 79.7 | 965.50 | 118,390 | 20.3 | 819.30 |
| Delaware | 144,530 | 890.60 | 123,900 | 85.7 | 915.50 | 20,630 | 14.3 | 741.40 |
| District of Columbia | 72,330 | 734.30 | 55,460 | 76.7 | 764.20 | 16,870 | 23.3 | 635.70 |
| Florida | 3,333,390 | 850.80 | 2,981,360 | 89.4 | 873.10 | 352,030 | 10.6 | 661.40 |
| Georgia | 1,169,720 | 809.10 | 903,300 | 77.2 | 852.70 | 266,420 | 22.8 | 661.10 |
| Hawaii | 195,430 | 848.90 | 170,690 | 87.3 | 866.40 | 24,740 | 12.7 | 728.40 |
| Idaho | 211,670 | 825.40 | 184,990 | 87.4 | 844.90 | 26,680 | 12.6 | 690.10 |
| Illinois | 1,872,890 | 884.40 | 1,523,000 | 81.3 | 911.40 | 349,890 | 18.7 | 766.60 |
| Indiana | 1,025,720 | 881.60 | 827,950 | 80.7 | 912.00 | 197,770 | 19.3 | 754.60 |
| Iowa | 544,030 | 848.10 | 472,660 | 86.9 | 867.40 | 71,370 | 13.1 | 720.00 |
| Kansas | 443,830 | 865.60 | 377,310 | 85.0 | 888.30 | 66,520 | 15.0 | 737.00 |
| Kentucky | 769,060 | 775.80 | 546,620 | 71.1 | 824.60 | 222,440 | 28.9 | 655.80 |
| Louisiana | 731,080 | 759.00 | 510,030 | 69.8 | 814.10 | 221,050 | 30.2 | 631.90 |
| Maine | 262,600 | 775.00 | 207,850 | 79.2 | 808.80 | 54,750 | 20.8 | 647.00 |
| Maryland | 752,770 | 862.10 | 616,720 | 81.9 | 885.50 | 136,050 | 18.1 | 755.70 |
| Massachusetts | 1,064,340 | 855.30 | 852,960 | 80.1 | 883.10 | 211,380 | 19.9 | 743.30 |
| Michigan | 1,694,480 | 901.30 | 1,407,770 | 83.1 | 929.90 | 286,710 | 16.9 | 761.10 |
| Minnesota | 764,810 | 852.50 | 650,610 | 85.1 | 876.40 | 114,200 | 14.9 | 716.20 |
| Mississippi | 537,070 | 742.80 | 404,130 | 75.2 | 787.70 | 132,940 | 24.8 | 606.30 |
| Missouri | 1,034,170 | 828.30 | 837,190 | 81.0 | 858.40 | 196,980 | 19.0 | 700.50 |
| Montana | 163,720 | 811.90 | 139,290 | 85.1 | 833.80 | 24,430 | 14.9 | 687.10 |
| Nebraska | 287,910 | 832.90 | 247,140 | 85.8 | 854.30 | 40,770 | 14.2 | 703.20 |
| Nevada | 329,620 | 870.80 | 283,210 | 85.9 | 891.60 | 46,410 | 14.1 | 743.50 |
| New Hampshire | 213,520 | 869.20 | 178,320 | 83.5 | 894.40 | 35,200 | 16.5 | 741.60 |
| New Jersey | 1,366,270 | 944.20 | 1,110,670 | 81.3 | 968.80 | 255,600 | 18.7 | 837.60 |
| New Mexico | 295,640 | 770.20 | 241,860 | 81.8 | 812.10 | 53,780 | 18.2 | 581.80 |
| New York | 3,032,710 | 895.00 | 2,446,440 | 80.7 | 924.20 | 586,270 | 19.3 | 772.80 |
| North Carolina | 1,435,850 | 819.80 | 1,115,650 | 77.7 | 864.70 | 320,200 | 22.3 | 663.40 |
| North Dakota | 114,220 | 790.90 | 95,170 | 83.3 | 815.30 | 19,050 | 16.7 | 669.00 |
| Ohio | 1,937,110 | 853.40 | 1,510,620 | 78.0 | 884.00 | 426,490 | 22.0 | 744.90 |
| Oklahoma | 614,530 | 808.80 | 500,390 | 81.4 | 841.50 | 114,140 | 18.6 | 665.90 |
| Oregon | 597,950 | 863.00 | 540,530 | 90.4 | 879.00 | 57,420 | 9.6 | 712.30 |
| Pennsylvania | 2,387,770 | 875.40 | 1,922,140 | 80.5 | 901.40 | 465,630 | 19.5 | 767.90 |
| Rhode Island | 191,960 | 857.50 | 152,940 | 79.7 | 888.20 | 39,020 | 20.3 | 737.10 |
| South Carolina | 733,250 | 813.10 | 567,380 | 77.4 | 859.80 | 165,870 | 22.6 | 653.50 |
| South Dakota | 138,570 | 776.60 | 118,460 | 85.5 | 800.30 | 20,110 | 14.5 | 637.10 |
| Tennessee | 1,047,700 | 805.10 | 809,170 | 77.2 | 847.00 | 238,530 | 22.8 | 662.90 |
| Texas | 2,794,350 | 810.30 | 2,201,800 | 78.8 | 853.10 | 592,550 | 21.2 | 651.30 |
| Utah | 256,610 | 845.60 | 224,460 | 87.5 | 868.30 | 32,150 | 12.5 | 687.20 |
| Vermont | 108,900 | 827.70 | 89,760 | 82.4 | 853.80 | 19,140 | 17.6 | 705.50 |
| Virginia | 1,092,310 | 827.40 | 852,910 | 78.1 | 863.90 | 239,400 | 21.9 | 697.40 |
| Washington | 891,320 | 885.30 | 800,540 | 89.8 | 903.70 | 90,780 | 10.2 | 723.20 |
| West Virginia | 403,370 | 811.50 | 267,450 | 66.3 | 858.30 | 135,920 | 33.7 | 719.60 |
| Wisconsin | 924,150 | 875.30 | 793,520 | 85.9 | 896.00 | 130,630 | 14.1 | 749.60 |
| Wyoming | 80,650 | 851.60 | 68,580 | 85.0 | 872.10 | 12,070 | 15.0 | 735.60 |
| Outlying areas | | | | | | | | |
| Puerto Rico | 698,010 | 549.50 | 399,380 | 57.2 | 629.00 | 298,630 | 42.8 | 443.20 |
| Other ^a | 463,540 | 508.10 | 327,620 | 70.7 | 513.20 | 135,920 | 29.3 | 495.90 |

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).

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

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 of beneficiaries with a representative payee as a percentage of all beneficiaries, by type of beneficiary and age, December 2003

| Type of beneficiary and age | All beneficiaries | Beneficiaries with representative payee | |
|--------------------------------|-------------------|---|---------------------------------|
| | | Number | Percentage of all beneficiaries |
| Total | 47,053,140 | 4,978,970 | 10.6 |
| Adult beneficiaries | 43,971,880 | 1,900,070 | 4.3 |
| Retired workers | 29,547,530 | 432,610 | 1.5 |
| Under 65 | 2,587,310 | 4,440 | 0.2 |
| 65–74 | 14,314,220 | 130,210 | 0.9 |
| 75–84 | 9,471,170 | 147,950 | 1.6 |
| 85 or older | 3,174,830 | 150,010 | 4.7 |
| Disabled workers | 5,867,460 | 698,810 | 11.9 |
| Under 35 | 396,380 | 118,730 | 30.0 |
| 35–44 | 983,310 | 171,810 | 17.5 |
| 45–54 | 1,840,090 | 222,990 | 12.1 |
| 55 or older | 2,647,680 | 185,280 | 7.0 |
| Wives and husbands | 2,773,630 | 21,840 | 0.8 |
| Under 65 | 442,490 | 2,730 | 0.6 |
| 65–74 | 1,379,880 | 8,640 | 0.6 |
| 75–84 | 830,830 | 7,690 | 0.9 |
| 85 or older | 120,430 | 2,780 | 2.3 |
| Widow(er)s ^a | 4,690,410 | 135,570 | 2.9 |
| Under 65 | 639,790 | 2,510 | 0.4 |
| 65–74 | 1,354,790 | 21,220 | 1.6 |
| 75–84 | 1,723,400 | 48,090 | 2.8 |
| 85 or older | 972,430 | 63,750 | 6.6 |
| Disabled widow(er)s | 207,630 | 13,890 | 6.7 |
| Under 55 | 26,820 | 2,020 | 7.5 |
| 55–64 | 180,810 | 11,870 | 6.6 |
| Disabled adult children | 757,200 | 593,760 | 78.4 |
| Under 35 | 209,310 | 149,030 | 71.2 |
| 35–44 | 205,470 | 161,010 | 78.4 |
| 45–54 | 177,340 | 144,420 | 81.4 |
| 55 or older | 165,080 | 139,300 | 84.4 |
| Students aged 18–19 | 128,020 | 3,590 | 2.8 |
| Children under age 18 | 3,081,260 | 3,078,900 | 99.9 |
| In custody of parent payee | 2,759,180 | 2,759,180 | 100.0 |
| Not in custody of parent payee | 322,080 | 319,720 | 99.3 |

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

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

CONTACT: Robert L. Hackendorf (410) 965-5536 or Cherie 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 1983–2003, selected years

| Year and country | Total | Retired workers | Disabled workers | Wives and husbands | Widow(er)s ^a | Children |
|------------------|---------------|-----------------|------------------|--------------------|-------------------------|--------------|
| | <i>Number</i> | | | | | |
| 1983 | 1,541 | 970 | 97 | 266 | 109 | 99 |
| 1984 | 2,717 | 1,664 | 254 | 435 | 202 | 162 |
| 1985 | 7,857 | 4,773 | 404 | 1,730 | 578 | 372 |
| 1990 | 27,662 | 17,432 | 1,609 | 5,801 | 2,078 | 742 |
| 1995 | 54,806 | 35,925 | 2,428 | 10,974 | 4,431 | 1,048 |
| 1996 | 59,455 | 39,085 | 2,514 | 11,917 | 4,893 | 1,046 |
| 1997 | 63,842 | 42,163 | 2,662 | 12,583 | 5,342 | 1,092 |
| 1998 | 68,748 | 45,632 | 2,708 | 13,376 | 5,926 | 1,106 |
| 1999 | 74,933 | 50,018 | 2,749 | 14,421 | 6,636 | 1,109 |
| 2000 | 82,404 | 55,398 | 2,687 | 15,806 | 7,302 | 1,211 |
| 2001 | 88,770 | 59,713 | 2,859 | 17,013 | 7,917 | 1,268 |
| 2002 | 94,350 | 63,418 | 2,992 | 18,032 | 8,585 | 1,323 |
| 2003 | 99,728 | 67,055 | 2,986 | 19,171 | 9,190 | 1,326 |
| Australia | 225 | 169 | ^b | 45 | ^b | ^b |
| Austria | 831 | 611 | 59 | 104 | 38 | 19 |
| Belgium | 585 | 420 | 7 | 103 | 47 | 8 |
| Canada | 40,889 | 25,246 | 1,500 | 8,861 | 4,788 | 494 |
| Chile | 26 | 20 | ^b | 5 | ^b | ^b |
| Finland | 187 | 138 | 9 | 29 | 6 | 5 |
| France | 3,391 | 2,445 | 40 | 601 | 244 | 61 |
| Germany | 15,368 | 11,544 | 631 | 2,166 | 828 | 199 |
| Greece | 2,346 | 1,596 | 101 | 455 | 153 | 41 |
| Ireland | 1,175 | 842 | 32 | 205 | 77 | 19 |
| Italy | 7,772 | 4,984 | 101 | 1,460 | 1,117 | 110 |
| Luxembourg | 33 | 20 | ^b | 6 | ^b | ^b |
| Netherlands | 1,924 | 1,351 | 9 | 413 | 119 | 32 |
| Norway | 3,211 | 2,055 | 103 | 644 | 371 | 38 |
| Portugal | 1,777 | 1,151 | 105 | 287 | 194 | 40 |
| Spain | 1,867 | 1,155 | 68 | 400 | 202 | 42 |
| Sweden | 1,372 | 1,027 | 21 | 245 | 57 | 22 |
| Switzerland | 3,180 | 2,332 | 32 | 636 | 146 | 34 |
| United Kingdom | 13,569 | 9,949 | 162 | 2,506 | 796 | 156 |

(Continued)

5.M OASDI Current-Pay Benefits: International Agreements

Table 5.M1—Number of beneficiaries and average monthly benefit under U.S. totalization agreements, by country and type of benefit, December 1983–2003, selected years—Continued

| Year and country | Total | Retired workers | Disabled workers | Wives and husbands | Widow(er)s ^a | Children |
|--|--------|-----------------|------------------|--------------------|-------------------------|--------------|
| <i>Average monthly benefit (dollars)</i> | | | | | | |
| 1983 | 62.61 | 68.77 | 145.68 | 24.01 | 49.27 | 40.16 |
| 1984 | 79.29 | 90.32 | 144.07 | 25.64 | 51.61 | 42.90 |
| 1985 | 73.52 | 86.52 | 147.43 | 32.04 | 60.94 | 38.79 |
| 1990 | 108.07 | 122.87 | 223.71 | 44.37 | 88.01 | 63.88 |
| 1995 | 134.13 | 155.20 | 271.21 | 51.27 | 108.60 | 69.88 |
| 1996 | 138.89 | 160.65 | 287.11 | 52.80 | 112.45 | 74.22 |
| 1997 | 143.69 | 165.94 | 298.78 | 54.24 | 115.62 | 74.27 |
| 1998 | 146.37 | 169.15 | 305.43 | 55.08 | 117.87 | 73.49 |
| 1999 | 151.22 | 174.94 | 312.05 | 56.58 | 123.64 | 78.56 |
| 2000 | 157.03 | 182.39 | 324.60 | 59.01 | 127.96 | 79.70 |
| 2001 | 162.05 | 188.04 | 340.20 | 60.96 | 131.50 | 83.98 |
| 2002 | 165.18 | 191.74 | 345.58 | 62.45 | 134.02 | 86.28 |
| 2003 | 168.89 | 196.31 | 355.12 | 64.04 | 89.42 | 138.42 |
| Australia | 159.97 | 175.48 | ^b | 81.76 | ^b | ^b |
| Austria | 199.67 | 225.66 | 226.12 | 64.10 | 173.71 | 75.79 |
| Belgium | 167.06 | 195.07 | 344.00 | 56.82 | 155.54 | 29.25 |
| Canada | 142.83 | 164.21 | 338.17 | 60.45 | 126.83 | 89.52 |
| Chile | 163.74 | 175.86 | ^b | 107.80 | ^b | ^b |
| Finland | 178.18 | 182.01 | 464.44 | 64.34 | 211.33 | 177.80 |
| France | 181.35 | 210.60 | 399.02 | 68.97 | 157.59 | 68.57 |
| Germany | 211.52 | 238.07 | 347.28 | 64.67 | 150.28 | 93.99 |
| Greece | 148.00 | 157.94 | 393.30 | 65.24 | 137.52 | 114.34 |
| Ireland | 192.79 | 212.58 | 515.03 | 75.18 | 184.48 | 75.79 |
| Italy | 155.33 | 184.88 | 424.28 | 62.02 | 128.01 | 85.18 |
| Luxembourg | 195.41 | 221.78 | ^b | 66.17 | ^b | ^b |
| Netherlands | 163.23 | 191.30 | 720.33 | 67.80 | 156.92 | 76.66 |
| Norway | 166.01 | 184.61 | 401.43 | 71.06 | 167.24 | 119.29 |
| Portugal | 162.03 | 171.26 | 384.05 | 67.45 | 141.05 | 94.08 |
| Spain | 148.80 | 168.79 | 347.41 | 60.87 | 149.58 | 111.40 |
| Sweden | 154.65 | 173.02 | 313.05 | 67.26 | 170.77 | 77.45 |
| Switzerland | 160.70 | 184.58 | 418.97 | 65.88 | 153.32 | 85.09 |
| United Kingdom | 212.00 | 249.47 | 399.97 | 71.81 | 171.93 | 83.29 |

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

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

CONTACT: Dana N. Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

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

Benefits Awarded

| | |
|--------------------------|------|
| Summary | 6.1 |
| Retired Workers | 6.11 |
| Disabled Workers | 6.18 |
| Dependents and Survivors | 6.22 |

Benefits Withheld **6.36**

Benefits Terminated **6.40**

Table 6.A1—Number, by type of benefit, 1940–2003

| Year | All benefits | Retired workers | Disabled workers | Wives and husbands of— | | Children of— | | | Widowed mothers and fathers | Widow(ers) | Parents | Special age-72 beneficiaries |
|-------------------|--------------|-----------------|------------------|------------------------|------------------|-----------------|------------------|------------------|-----------------------------|------------|---------|------------------------------|
| | | | | Retired workers | Disabled workers | Retired workers | Deceased workers | Disabled workers | | | | |
| Total | 189,931,568 | 78,150,063 | 20,600,466 | 18,185,339 | 3,742,026 | 7,132,095 | 20,939,516 | 14,645,383 | 4,782,557 | 20,372,678 | 114,011 | 1,267,434 |
| 1940 | 254,984 | 132,335 | ... | 34,555 | ... | 8,249 | 51,133 | ... | 23,260 | 4,600 | 852 | ... |
| 1941 | 269,286 | 114,660 | ... | 36,213 | ... | 6,031 | 69,588 | ... | 30,502 | 11,020 | 1,272 | ... |
| 1942 | 258,116 | 99,622 | ... | 33,250 | ... | 4,859 | 72,525 | ... | 31,820 | 14,774 | 1,266 | ... |
| 1943 | 262,865 | 89,070 | ... | 31,916 | ... | 3,652 | 81,967 | ... | 35,420 | 19,576 | 1,264 | ... |
| 1944 | 318,949 | 110,097 | ... | 40,349 | ... | 4,350 | 95,326 | ... | 42,649 | 24,759 | 1,419 | ... |
| 1945 | 462,463 | 185,174 | ... | 63,068 | ... | 7,215 | 120,299 | ... | 55,108 | 29,844 | 1,755 | ... |
| 1946 | 547,150 | 258,980 | ... | 88,515 | ... | 10,736 | 104,139 | ... | 44,190 | 38,823 | 1,767 | ... |
| 1947 | 572,909 | 271,488 | ... | 94,189 | ... | 12,446 | 103,308 | ... | 42,807 | 45,249 | 3,422 | ... |
| 1948 | 596,201 | 275,903 | ... | 98,554 | ... | 12,604 | 106,351 | ... | 44,276 | 55,667 | 2,846 | ... |
| 1949 | 682,241 | 337,273 | ... | 117,356 | ... | 15,854 | 103,068 | ... | 43,087 | 62,928 | 2,675 | ... |
| 1950 | 962,628 | 567,131 | ... | 162,768 | ... | 25,495 | 97,146 | ... | 41,101 | 66,735 | 2,252 | ... |
| 1951 | 1,336,432 | 702,984 | ... | 228,887 | ... | 40,958 | 189,542 | ... | 78,323 | 89,591 | 6,147 | ... |
| 1952 | 1,053,303 | 531,206 | ... | 177,707 | ... | 24,695 | 158,650 | ... | 64,875 | 92,302 | 3,868 | ... |
| 1953 | 1,419,462 | 771,671 | ... | 246,856 | ... | 33,868 | 178,310 | ... | 71,945 | 112,866 | 3,946 | ... |
| 1954 | 1,401,733 | 749,911 | ... | 236,764 | ... | 35,938 | 176,858 | ... | 70,775 | 128,026 | 3,461 | ... |
| 1955 | 1,657,773 | 909,883 | ... | 288,915 | ... | 40,402 | 198,393 | ... | 76,018 | 140,624 | 3,538 | ... |
| 1956 | 1,855,296 | 934,033 | ... | 384,562 | ... | 37,900 | 173,883 | ... | 67,475 | 253,524 | 3,919 | ... |
| 1957 | 2,832,344 | 1,424,975 | 178,802 | 578,012 | ... | 81,842 | 231,321 | ... | 88,174 | 244,633 | 4,585 | ... |
| 1958 ^a | 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 ^b | 2,501,802 | 1,089,740 | 177,811 | 390,517 | 54,299 | 83,157 | 265,123 | 78,655 | 102,020 | 252,683 | 7,797 | ... |
| 1960 | 2,336,144 | 981,717 | 207,805 | 339,987 | 54,187 | 69,979 | 241,430 | 104,310 | 92,607 | 239,267 | 4,855 | ... |
| 1961 | 3,046,653 | 1,361,505 | 279,758 | 394,198 | 77,588 | 126,019 | 264,440 | 189,283 | 98,449 | 251,275 | 4,138 | ... |
| 1962 | 3,004,501 | 1,347,268 | 250,634 | 393,857 | 69,212 | 135,984 | 266,286 | 170,354 | 99,925 | 267,051 | 3,930 | ... |
| 1963 | 2,729,559 | 1,145,602 | 223,739 | 345,610 | 66,543 | 115,220 | 281,511 | 163,967 | 104,960 | 278,709 | 3,698 | ... |
| 1964 | 2,552,063 | 1,041,807 | 207,592 | 316,262 | 59,706 | 100,051 | 288,304 | 145,439 | 106,249 | 283,263 | 3,390 | ... |
| 1965 | 3,072,426 | 1,183,133 | 253,499 | 321,015 | 69,183 | 134,187 | 451,399 | 197,616 | 100,005 | 359,431 | 2,958 | ... |
| 1966 | 4,722,483 | 1,647,524 | 278,345 | 396,856 | 81,238 | 195,055 | 584,901 | 276,093 | 107,135 | 403,595 | 3,202 | 748,539 |
| 1967 | 3,596,770 | 1,161,130 | 301,359 | 319,503 | 87,296 | 167,676 | 534,568 | 282,662 | 110,762 | 355,589 | 2,658 | 273,567 |
| 1968 | 3,619,927 | 1,240,098 | 323,154 | 329,935 | 89,603 | 172,460 | 593,331 | 299,016 | 113,765 | 375,391 | 2,144 | 81,030 |
| 1969 | 3,699,633 | 1,272,784 | 344,741 | 335,723 | 94,690 | 176,162 | 622,109 | 313,629 | 116,922 | 375,753 | 2,093 | 45,027 |
| 1970 | 3,722,433 | 1,338,107 | 350,384 | 339,447 | 96,304 | 182,595 | 591,724 | 316,546 | 112,377 | 363,216 | 1,852 | 29,881 |
| 1971 | 3,965,157 | 1,391,403 | 415,897 | 338,219 | 113,222 | 196,589 | 613,193 | 372,224 | 116,548 | 381,262 | 1,635 | 24,965 |
| 1972 | 4,202,607 | 1,461,399 | 455,438 | 353,742 | 124,366 | 209,422 | 643,513 | 411,766 | 117,699 | 402,809 | 2,086 | 20,367 |
| 1973 | 4,220,493 | 1,493,194 | 491,616 | 349,493 | 128,198 | 217,708 | 618,825 | 413,751 | 118,775 | 372,167 | 1,655 | 15,111 |
| 1974 | 4,100,809 | 1,413,145 | 535,977 | 319,149 | 132,042 | 201,684 | 574,174 | 443,909 | 109,221 | 363,693 | 1,155 | 6,660 |
| 1975 | 4,427,138 | 1,505,750 | 592,049 | 350,558 | 148,741 | 225,579 | 591,118 | 515,216 | 116,224 | 377,246 | 969 | 3,688 |
| 1976 | 4,351,654 | 1,475,773 | 551,460 | 346,623 | 147,407 | 236,805 | 578,905 | 511,487 | 113,520 | 385,373 | 914 | 3,387 |
| 1977 | 4,610,730 | 1,593,631 | 568,874 | 390,874 | 151,938 | 259,447 | 587,589 | 518,477 | 118,821 | 416,735 | 870 | 3,474 |
| 1978 | 4,166,571 | 1,472,786 | 464,415 | 346,956 | 130,161 | 214,284 | 566,992 | 453,382 | 110,015 | 403,679 | 844 | 3,057 |
| 1979 | 4,229,286 | 1,590,854 | 416,713 | 358,163 | 113,243 | 247,800 | 544,549 | 399,172 | 110,424 | 445,555 | 788 | 2,025 |
| 1980 | 4,214,567 | 1,612,669 | 396,559 | 360,693 | 108,500 | 248,658 | 540,246 | 385,208 | 107,809 | 452,156 | 724 | 1,345 |
| 1981 | 4,029,827 | 1,578,990 | 351,847 | 338,540 | 95,575 | 211,406 | 535,487 | 339,654 | 99,653 | 477,121 | 606 | 948 |
| 1982 | 3,840,579 | 1,618,411 | 297,131 | 349,967 | 77,835 | 182,849 | 473,396 | 260,470 | 86,786 | 492,451 | 498 | 785 |
| 1983 | 3,755,994 | 1,669,738 | 311,549 | 356,274 | 80,079 | 144,945 | 380,992 | 226,895 | 82,464 | 501,688 | 431 | 939 |
| 1984 | 3,690,103 | 1,607,370 | 361,998 | 342,691 | 81,834 | 131,986 | 351,326 | 238,252 | 73,794 | 499,677 | 383 | 792 |
| 1985 | 3,796,394 | 1,690,490 | 377,371 | 356,558 | 83,511 | 128,076 | 332,531 | 253,025 | 72,241 | 501,673 | 381 | 537 |
| 1986 | 3,853,454 | 1,734,248 | 416,865 | 358,115 | 82,435 | 122,652 | 319,808 | 258,167 | 69,340 | 491,052 | 344 | 428 |
| 1987 | 3,733,853 | 1,681,716 | 415,848 | 333,333 | 77,316 | 117,984 | 310,573 | 256,742 | 64,777 | 475,035 | 286 | 243 |
| 1988 | 3,680,969 | 1,654,068 | 409,490 | 316,929 | 73,790 | 116,659 | 324,346 | 265,026 | 62,676 | 457,574 | 263 | 148 |
| 1989 | 3,646,349 | 1,656,744 | 425,582 | 310,498 | 69,113 | 106,491 | 307,484 | 261,387 | 59,525 | 449,139 | 281 | 105 |
| 1990 | 3,716,924 | 1,664,754 | 467,977 | 308,980 | 69,667 | 108,105 | 303,616 | 283,586 | 58,060 | 451,862 | 233 | 84 |
| 1991 | 3,865,426 | 1,695,346 | 536,434 | 307,000 | 72,754 | 107,261 | 301,459 | 318,188 | 57,896 | 468,788 | 246 | 54 |
| 1992 | 4,050,849 | 1,707,949 | 636,637 | 304,764 | 78,083 | 108,686 | 304,300 | 381,585 | 56,402 | 472,078 | 298 | 67 |
| 1993 | 4,001,201 | 1,661,281 | 635,238 | 290,728 | 74,605 | 106,566 | 311,290 | 398,598 | 56,408 | 466,198 | 238 | 51 |
| 1994 | 3,940,342 | 1,625,347 | 631,870 | 275,025 | 69,549 | 102,983 | 310,051 | 411,205 | 54,732 | 459,340 | 213 | 27 |

(Continued)

6.A OASDI Benefits Awarded: Summary

Table 6.A1—Number, by type of benefit, 1940–2003—Continued

| Year | All benefits | 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 | | | | |
| 1995 | 3,882,193 | 1,609,174 | 645,832 | 258,740 | 63,097 | 101,239 | 306,044 | 401,295 | 51,645 | 444,899 | 200 | 28 |
| 1996 | 3,793,238 | 1,581,452 | 624,335 | 244,014 | 57,528 | 98,655 | 302,480 | 397,350 | 49,150 | 438,081 | 177 | 16 |
| 1997 | 3,865,966 | 1,718,623 | 587,417 | 268,012 | 50,818 | 97,594 | 297,204 | 362,548 | 43,504 | 440,076 | 157 | 13 |
| 1998 | 3,800,259 | 1,631,511 | 608,131 | 263,668 | 47,550 | 96,893 | 294,851 | 371,426 | 42,395 | 443,669 | 152 | 13 |
| 1999 | 3,917,099 | 1,690,024 | 620,488 | 275,568 | 46,164 | 99,826 | 295,196 | 378,144 | 41,756 | 469,806 | 118 | 9 |
| 2000 | 4,290,080 | 1,960,649 | 621,650 | 341,503 | 43,941 | 115,358 | 297,686 | 363,632 | 40,491 | 505,021 | 135 | 14 |
| 2001 | 4,161,971 | 1,779,228 | 691,309 | 314,547 | 43,412 | 110,680 | 302,445 | 383,049 | 41,323 | 495,848 | 129 | 1 |
| 2002 | 4,335,714 | 1,812,551 | 750,003 | 317,685 | 45,600 | 116,186 | 310,395 | 419,780 | 40,829 | 522,537 | 139 | 9 |
| 2003 | 4,321,778 | 1,791,316 | 777,461 | 305,831 | 47,183 | 111,992 | 305,409 | 434,953 | 39,206 | 508,306 | 121 | 0 |

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

NOTES: Benefits not necessarily payable at time of award.

... = not applicable.

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

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

Table 6.A2—Average primary insurance amount for retired workers and average monthly benefit for retired and disabled workers, and nondisabled widows, by type of benefit and sex, selected years 1940–2003 (in dollars)

| Year ^a | Average primary insurance amount for retired workers (dollars) | | | Average monthly benefit (dollars) | | | | | | |
|-------------------|--|--------|--------|-----------------------------------|--------|--------|------------------|--------|--------|---------------------|
| | All | Men | Women | Retired workers | | | Disabled workers | | | Non-disabled widows |
| | | | | All | Men | Women | All | Men | Women | |
| 1940 | 22.71 | 23.26 | 18.38 | 22.71 | 23.26 | 18.38 | ... | ... | ... | 20.36 |
| 1945 | 25.11 | 25.71 | 19.99 | 25.11 | 25.71 | 19.99 | ... | ... | ... | 20.17 |
| 1950 (Jan.–Aug.) | 29.03 | 30.16 | 22.98 | 29.03 | 30.16 | 22.98 | ... | ... | ... | 21.65 |
| 1950 (Sept.–Dec.) | 33.24 | 35.32 | 26.85 | 33.24 | 35.32 | 26.85 | ... | ... | ... | 36.89 |
| 1955 | 69.74 | 75.86 | 56.05 | 69.74 | 75.86 | 56.05 | ... | ... | ... | 49.68 |
| 1960 | 83.87 | 92.03 | 69.23 | 81.73 | 92.03 | 63.26 | 91.16 | 94.02 | 78.91 | 62.12 |
| 1965 (Jan.–Aug.) | 88.57 | 96.56 | 74.99 | 82.69 | 90.89 | 68.78 | 93.26 | 97.89 | 80.27 | 73.81 |
| 1965 (Sept.–Dec.) | 99.36 | 108.79 | 82.34 | 89.20 | 99.90 | 71.26 | 101.30 | 106.51 | 86.75 | 75.37 |
| 1970 | 133.94 | 146.99 | 113.69 | 123.82 | 136.80 | 103.67 | 139.79 | 148.39 | 115.74 | 106.95 |
| 1975 (Jan.–May) | 216.56 | 242.76 | 176.76 | 196.42 | 220.35 | 160.50 | 220.60 | 241.48 | 175.27 | 185.34 |
| 1975 (June–Dec.) | 235.13 | 264.67 | 191.56 | 213.68 | 241.05 | 173.31 | 243.47 | 266.08 | 192.13 | 198.88 |
| 1980 (Jan.–May) | 353.80 | 411.70 | 270.50 | 321.10 | 374.00 | 244.90 | 352.10 | 388.80 | 269.70 | 277.50 |
| 1980 (June–Dec.) | 396.30 | 465.50 | 301.00 | 359.80 | 422.90 | 272.90 | 396.50 | 437.90 | 301.00 | 312.80 |
| 1981 (Jan.–May) | 400.10 | 467.50 | 302.60 | 363.60 | 424.20 | 276.00 | 389.80 | 431.40 | 295.00 | 313.00 |
| 1981 (June–Dec.) | 438.80 | 514.50 | 332.60 | 400.10 | 468.00 | 304.80 | 425.60 | 471.30 | 320.70 | 346.30 |
| 1982 (Jan.–May) | 425.60 | 504.20 | 315.10 | 388.40 | 457.50 | 291.40 | 416.90 | 462.40 | 312.70 | 350.80 |
| 1982 (June–Dec.) | 447.10 | 532.70 | 328.50 | 408.60 | 483.00 | 305.50 | 441.10 | 489.50 | 328.00 | 375.30 |
| 1983 (Jan.–Nov.) | 448.00 | 531.60 | 330.00 | 408.20 | 480.30 | 306.50 | 432.40 | 480.30 | 317.90 | 385.10 |
| 1983 (Dec.) | 451.20 | 546.40 | 325.50 | 410.20 | 491.80 | 302.50 | 445.30 | 496.80 | 333.20 | 400.50 |
| 1984 (Jan.–Nov.) | 457.10 | 544.40 | 335.60 | 414.70 | 489.40 | 310.90 | 443.00 | 494.00 | 332.20 | 406.80 |
| 1984 (Dec.) | 471.00 | 565.70 | 343.00 | 429.50 | 511.30 | 318.90 | 461.10 | 516.50 | 342.90 | 428.00 |
| 1985 (Jan.–Nov.) | 475.70 | 566.20 | 348.00 | 432.00 | 509.60 | 322.20 | 459.20 | 514.00 | 345.00 | 431.10 |
| 1985 (Dec.) | 487.60 | 588.30 | 352.00 | 443.10 | 530.00 | 326.10 | 477.60 | 535.90 | 357.20 | 436.90 |
| 1986 (Jan.–Nov.) | 500.30 | 596.90 | 363.50 | 453.10 | 536.00 | 335.70 | 471.50 | 527.60 | 358.20 | 452.10 |
| 1986 (Dec.) | 504.60 | 611.00 | 361.70 | 456.90 | 548.40 | 334.00 | 489.00 | 546.90 | 369.60 | 446.20 |
| 1987 (Jan.–Nov.) | 516.80 | 618.90 | 374.10 | 466.10 | 553.60 | 343.90 | 487.00 | 546.80 | 368.90 | 462.00 |
| 1987 (Dec.) | 536.90 | 648.80 | 386.80 | 484.00 | 580.00 | 355.20 | 517.10 | 583.40 | 391.80 | 477.40 |
| 1988 (Jan.–Nov.) | 540.70 | 648.60 | 390.40 | 487.80 | 580.30 | 359.00 | 517.20 | 581.90 | 392.60 | 488.80 |
| 1988 (Dec.) | 560.00 | 679.50 | 401.20 | 504.90 | 607.00 | 369.20 | 543.00 | 612.70 | 410.00 | 499.20 |

(Continued)

6.A OASDI Benefits Awarded: Summary

Table 6.A2—Average primary insurance amount for retired workers and average monthly benefit for retired and disabled workers, and nondisabled widows, by type of benefit and sex, selected years 1940–2003 (in dollars)—Continued

| Year ^a | Average primary insurance amount for retired workers (dollars) | | | Average monthly benefit (dollars) | | | | | | |
|-------------------|--|----------|--------|-----------------------------------|----------|--------|------------------|----------|--------|---------------------|
| | All | Men | Women | Retired workers | | | Disabled workers | | | Non-disabled widows |
| | | | | All | Men | Women | All | Men | Women | |
| 1989 (Jan.–Nov.) | 572.80 | 686.90 | 412.90 | 516.60 | 614.80 | 379.00 | 539.90 | 608.00 | 414.40 | 512.90 |
| 1989 (Dec.) | 597.50 | 724.90 | 425.90 | 538.70 | 647.50 | 392.10 | 571.20 | 645.90 | 437.50 | 525.70 |
| 1990 (Jan.–Nov.) | 609.00 | 729.70 | 438.20 | 550.50 | 654.60 | 403.30 | 566.90 | 637.80 | 438.90 | 541.10 |
| 1990 (Dec.) | 626.40 | 761.00 | 447.30 | 559.30 | 672.10 | 409.30 | 600.60 | 676.90 | 466.60 | 566.60 |
| 1991 (Jan.–Nov.) | 642.80 | 768.90 | 460.40 | 583.50 | 692.30 | 426.10 | 593.00 | 666.90 | 464.20 | 573.70 |
| 1991 (Dec.) | 656.20 | 793.40 | 467.40 | 592.80 | 709.50 | 432.10 | 613.20 | 689.70 | 481.50 | 582.10 |
| 1992 (Jan.–Nov.) | 671.60 | 803.10 | 483.40 | 608.60 | 721.90 | 446.50 | 601.60 | 677.00 | 474.70 | 596.90 |
| 1992 (Dec.) | 688.30 | 829.30 | 493.80 | 620.70 | 740.90 | 454.90 | 625.70 | 706.50 | 490.30 | 604.00 |
| 1993 (Jan.–Nov.) | 697.10 | 831.50 | 507.10 | 630.60 | 746.20 | 467.00 | 621.70 | 699.80 | 494.70 | 620.70 |
| 1993 (Dec.) | 716.20 | 861.70 | 519.00 | 645.90 | 769.80 | 477.90 | 649.90 | 735.70 | 512.30 | 618.90 |
| 1994 (Jan.–Nov.) | 722.90 | 862.90 | 530.30 | 651.00 | 771.30 | 485.40 | 647.00 | 731.30 | 518.50 | 637.80 |
| 1994 (Dec.) | 741.90 | 892.40 | 541.50 | 665.70 | 794.20 | 494.50 | 684.80 | 776.50 | 549.00 | 644.60 |
| 1995 (Jan.–Nov.) | 744.30 | 887.00 | 551.40 | 671.70 | 794.30 | 505.80 | 675.70 | 767.30 | 546.00 | 662.50 |
| 1995 (Dec.) | 765.30 | 917.60 | 563.60 | 668.40 | 818.00 | 516.70 | 703.40 | 798.70 | 568.70 | 675.40 |
| 1996 (Jan.–Nov.) | 769.20 | 916.80 | 572.40 | 693.60 | 820.50 | 524.50 | 693.70 | 788.90 | 567.80 | 683.10 |
| 1996 (Dec.) | 788.90 | 950.20 | 582.90 | 708.70 | 846.00 | 533.30 | 727.70 | 832.00 | 590.00 | 690.30 |
| 1997 (Jan.–Nov.) | 787.10 | 951.70 | 608.50 | 723.30 | 854.30 | 581.30 | 718.30 | 820.40 | 590.70 | 700.60 |
| 1997 (Dec.) | 812.80 | 982.00 | 610.40 | 734.50 | 876.90 | 564.40 | 748.40 | 851.60 | 615.10 | 699.90 |
| 1998 (Jan.–Nov.) | 819.50 | 983.10 | 620.00 | 744.70 | 882.10 | 577.10 | 737.00 | 841.50 | 610.60 | 716.70 |
| 1998 (Dec.) | 831.10 | 1,003.20 | 628.80 | 754.20 | 898.40 | 584.70 | 762.00 | 870.30 | 633.80 | 711.00 |
| 1999 (Jan.–Nov.) | 857.60 | 1,023.20 | 649.50 | 777.10 | 918.40 | 599.60 | 763.90 | 870.60 | 636.60 | 713.30 |
| 1999 (Dec.) | 875.70 | 1,043.90 | 663.70 | 791.20 | 934.30 | 610.70 | 792.60 | 904.30 | 660.60 | 708.20 |
| 2000 (Jan.–Nov.) | 904.90 | 1,069.40 | 685.40 | 841.60 | 990.50 | 643.00 | 806.40 | 917.60 | 673.20 | 708.70 |
| 2000 (Dec.) | 930.00 | 1,111.00 | 713.00 | 842.80 | 996.50 | 658.50 | 846.60 | 960.20 | 710.00 | 715.40 |
| 2001 (Jan.–Nov.) | 953.90 | 1,134.50 | 730.80 | 855.70 | 1,008.40 | 667.20 | 847.00 | 961.70 | 711.00 | 735.80 |
| 2001 (Dec.) | 982.10 | 1,168.90 | 749.90 | 881.10 | 1,039.10 | 684.70 | 868.40 | 982.70 | 734.90 | 717.10 |
| 2002 (Jan.–Nov.) | 1,026.30 | 1,219.00 | 788.10 | 914.10 | 1,076.80 | 712.90 | 897.50 | 1,019.50 | 753.30 | 750.50 |
| 2002 (Dec.) | 1,029.90 | 1,230.00 | 788.50 | 916.90 | 1,084.50 | 714.80 | 906.70 | 1,028.10 | 762.50 | 751.90 |
| 2003 (Jan.–Nov.) | 1,067.10 | 1,272.60 | 824.90 | 939.70 | 1,109.40 | 739.60 | 935.80 | 1,061.50 | 786.90 | 779.00 |
| 2003 (Dec.) | 1,083.60 | 1,297.70 | 830.40 | 963.80 | 1,142.30 | 752.70 | 946.80 | 1,075.80 | 794.60 | 780.00 |

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

NOTE: . . . = not applicable.

a. Some years are shown in several parts to reflect changes in benefit rates during the year.

CONTACT: Rona Blumenthal (410) 965-0163 or Joseph Bondar (410) 965-0162.

6.A OASDI Benefits Awarded: Summary

Table 6.A3—Number and average monthly benefit, by type of benefit, sex, age, basis of entitlement, and race, 2003

| Age and basis of entitlement | All races ^a | | White | | Black | | Other | |
|---------------------------------------|------------------------|--|-----------|--|---------|--|---------|--|
| | Number | Average monthly benefit ^b (dollars) | Number | Average monthly benefit ^b (dollars) | Number | Average monthly benefit ^b (dollars) | Number | Average monthly benefit ^b (dollars) |
| Retired workers^c | | | | | | | | |
| Total | 1,794,200 | 946.40 | 1,516,000 | 970.70 | 163,000 | 866.70 | 114,900 | 740.00 |
| 62–64 | 1,229,700 | 893.00 | 1,055,100 | 910.00 | 105,000 | 840.60 | 69,600 | 713.40 |
| 65–69 | 528,300 | 1,074.50 | 433,800 | 1,119.50 | 54,200 | 921.90 | 40,000 | 797.60 |
| 70 or older | 36,200 | 892.30 | 27,100 | 951.20 | 3,800 | 802.40 | 5,300 | 655.60 |
| <i>Men</i> | | | | | | | | |
| Subtotal | 964,000 | 1,108.50 | 817,000 | 1,144.90 | 85,000 | 964.10 | 61,900 | 826.80 |
| 62–64 | 644,600 | 1,060.50 | 553,000 | 1,089.40 | 56,200 | 924.10 | 35,400 | 825.80 |
| 65–69 | 309,000 | 1,213.30 | 257,600 | 1,266.20 | 27,000 | 1,041.10 | 24,300 | 845.20 |
| 70 or older | 10,400 | 970.50 | 6,400 | 1,059.90 | 1,800 | 1,058.30 | 2,200 | 638.40 |
| <i>Women</i> | | | | | | | | |
| Subtotal | 830,200 | 758.20 | 699,000 | 767.10 | 78,000 | 760.60 | 53,000 | 638.80 |
| 62–64 | 585,100 | 708.40 | 502,100 | 712.50 | 48,800 | 744.40 | 34,200 | 597.00 |
| 65–69 | 219,300 | 879.10 | 176,200 | 904.80 | 27,200 | 803.50 | 15,700 | 724.00 |
| 70 or older | 25,800 | 860.80 | 20,700 | 917.60 | 2,000 | 572.10 | 3,100 | 667.90 |
| Disabled workers | | | | | | | | |
| Total | 759,200 | 943.90 | 514,700 | 994.30 | 118,900 | 860.80 | 125,100 | 816.20 |
| Under 30 | 50,700 | 554.50 | 30,400 | 579.60 | 9,500 | 536.70 | 10,800 | 499.40 |
| 30–39 | 88,000 | 774.30 | 53,100 | 796.30 | 17,200 | 761.00 | 17,700 | 721.30 |
| 40–49 | 183,800 | 895.50 | 118,400 | 946.30 | 32,400 | 827.70 | 32,700 | 780.20 |
| 50–54 | 141,300 | 996.00 | 93,900 | 1,041.70 | 22,200 | 901.20 | 25,200 | 908.90 |
| 55–59 | 172,400 | 1,052.10 | 124,000 | 1,085.50 | 21,900 | 1,016.70 | 26,400 | 924.20 |
| 60 or older | 123,000 | 1,086.70 | 94,900 | 1,131.80 | 15,700 | 960.20 | 12,300 | 904.50 |
| <i>Men</i> | | | | | | | | |
| Subtotal | 417,500 | 1,070.60 | 293,300 | 1,138.60 | 58,800 | 915.30 | 65,100 | 905.90 |
| Under 30 | 28,200 | 564.00 | 17,100 | 611.50 | 5,000 | 482.10 | 6,100 | 498.10 |
| 30–39 | 46,200 | 817.40 | 27,300 | 860.20 | 7,600 | 766.20 | 11,300 | 748.50 |
| 40–49 | 94,800 | 989.10 | 64,200 | 1,056.60 | 16,200 | 841.80 | 14,300 | 854.70 |
| 50–54 | 78,200 | 1,140.70 | 54,700 | 1,191.00 | 10,400 | 966.80 | 13,100 | 1,068.50 |
| 55–59 | 98,100 | 1,212.50 | 72,900 | 1,260.90 | 10,800 | 1,136.80 | 14,300 | 1,023.20 |
| 60 or older | 72,000 | 1,269.70 | 57,100 | 1,315.50 | 8,800 | 1,093.00 | 6,000 | 1,104.50 |
| <i>Women</i> | | | | | | | | |
| Subtotal | 341,700 | 789.10 | 221,400 | 803.10 | 60,100 | 807.50 | 60,000 | 718.80 |
| Under 30 | 22,500 | 542.50 | 13,300 | 538.60 | 4,500 | 597.20 | 4,700 | 501.10 |
| 30–39 | 41,800 | 726.80 | 25,800 | 728.80 | 9,600 | 756.90 | 6,400 | 673.30 |
| 40–49 | 89,000 | 795.90 | 54,200 | 815.60 | 16,200 | 813.70 | 18,400 | 722.30 |
| 50–54 | 63,100 | 816.60 | 39,200 | 833.40 | 11,800 | 843.30 | 12,100 | 736.10 |
| 55–59 | 74,300 | 840.30 | 51,100 | 835.10 | 11,100 | 899.90 | 12,100 | 807.20 |
| 60 or older | 51,000 | 828.40 | 37,800 | 854.30 | 6,900 | 790.90 | 6,300 | 714.10 |
| Wives | | | | | | | | |
| Total | 217,000 | 407.00 | 182,000 | 424.40 | 16,100 | 340.90 | 18,700 | 296.40 |
| <i>Wives of retired workers</i> | | | | | | | | |
| Subtotal | 176,400 | 447.50 | 150,300 | 464.70 | 11,800 | 377.90 | 14,100 | 325.50 |
| Entitlement based on care of children | 10,400 | 393.70 | 7,400 | 407.30 | 1,600 | 394.70 | 1,400 | 320.50 |
| Entitlement based on age | 166,000 | 450.90 | 142,900 | 467.60 | 10,200 | 375.20 | 12,700 | 326.10 |
| 62–64 | 124,400 | 442.10 | 108,900 | 455.90 | 7,400 | 345.80 | 8,000 | 345.70 |
| 65–69 | 36,600 | 486.30 | 30,700 | 508.40 | 2,500 | 459.10 | 3,300 | 306.00 |
| 70 or older | 5,000 | 410.20 | 3,300 | 474.30 | 300 | 401.90 | 1,400 | 261.00 |
| <i>Wives of disabled workers</i> | | | | | | | | |
| Subtotal | 40,600 | 231.10 | 31,700 | 233.50 | 4,300 | 239.40 | 4,600 | 207.20 |
| Entitlement based on care of children | 19,700 | 166.60 | 14,200 | 169.40 | 2,400 | 160.90 | 3,100 | 158.40 |
| Entitlement based on age | 20,900 | 291.90 | 17,500 | 285.50 | 1,900 | 338.40 | 1,500 | 308.20 |

(Continued)

6.A OASDI Benefits Awarded: Summary

Table 6.A3—Number and average monthly benefit, by type of benefit, sex, age, basis of entitlement, and race, 2003—Continued

| Age and basis of entitlement | All races ^a | | White | | Black | | Other | |
|------------------------------------|------------------------|--|---------|--|---------|--|---------|--|
| | Number | Average monthly benefit ^b (dollars) | Number | Average monthly benefit ^b (dollars) | Number | Average monthly benefit ^b (dollars) | Number | Average monthly benefit ^b (dollars) |
| Husbands | | | | | | | | |
| Total | 13,000 | 234.60 | 8,100 | 240.50 | 2,000 | 232.60 | 2,900 | 219.60 |
| Husbands of retired workers | 9,300 | 256.50 | 6,200 | 1,260.90 | 1,300 | 254.30 | 1,800 | 250.80 |
| Husbands of disabled workers | 3,700 | 179.70 | 1,900 | 181.50 | 700 | 192.20 | 1,100 | 168.60 |
| Children | | | | | | | | |
| Total | 790,900 | ... | 479,200 | ... | 155,200 | ... | 154,400 | ... |
| By age | | | | | | | | |
| Under age 18 | 538,500 | 377.00 | 311,700 | 399.40 | 103,100 | 292.40 | 123,500 | 391.60 |
| Disabled, aged 18 or older | 35,200 | 445.70 | 23,300 | 452.10 | 6,600 | 400.10 | 5,300 | 474.20 |
| Students aged 18–19 | 217,200 | 528.10 | 144,200 | 564.00 | 45,500 | 445.80 | 25,600 | 468.50 |
| By basis of entitlement | | | | | | | | |
| Children of retired workers | 105,900 | 454.80 | 72,200 | 488.60 | 23,500 | 398.20 | 10,200 | 346.70 |
| Children of deceased workers | 297,000 | 635.40 | 161,100 | 711.70 | 51,600 | 510.90 | 82,900 | 565.50 |
| Children of disabled workers | 388,000 | 248.80 | 245,900 | 270.10 | 80,100 | 216.50 | 61,300 | 203.20 |
| Widowed mothers and fathers | | | | | | | | |
| Total | 37,100 | 682.30 | 22,000 | 730.60 | 3,600 | 637.00 | 11,400 | 605.60 |
| By age | | | | | | | | |
| Under 30 | 3,900 | 506.70 | 2,500 | 534.70 | 300 | ^d | 1,100 | 495.70 |
| 30–39 | 12,600 | 640.10 | 7,600 | 712.80 | 800 | 700.50 | 4,100 | 498.80 |
| 40–49 | 14,900 | 717.60 | 8,200 | 776.80 | 1,700 | 589.10 | 5,000 | 664.20 |
| 50–59 | 5,000 | 807.20 | 3,100 | 803.10 | 700 | 790.70 | 1,200 | 827.30 |
| 60 or older | 700 | 778.60 | 600 | 768.50 | 100 | ^d | ... | ... |
| By basis of entitlement | | | | | | | | |
| Widowed mothers | 32,000 | 708.60 | 18,800 | 768.30 | 3,200 | 656.20 | 9,900 | 615.10 |
| Widowed fathers | 5,100 | 517.10 | 3,200 | 509.30 | 400 | ^d | 1,500 | 542.80 |
| Nondisabled widow(er)s | | | | | | | | |
| Total | 332,000 | 939.60 | 203,100 | 989.50 | 18,800 | 747.90 | 109,100 | 878.40 |
| By age | | | | | | | | |
| 60–64 | 154,600 | 898.70 | 56,000 | 949.90 | 8,700 | 692.10 | 89,900 | 886.70 |
| 65–69 | 52,900 | 904.20 | 36,800 | 922.70 | 4,400 | 680.80 | 11,600 | 930.90 |
| 70–74 | 34,200 | 986.80 | 27,900 | 1,030.60 | 2,900 | 871.10 | 3,300 | 741.70 |
| 75 or older | 90,300 | 1,012.60 | 82,400 | 1,032.40 | 2,800 | 898.80 | 4,300 | 666.30 |
| By basis of entitlement | | | | | | | | |
| Widows | 315,600 | 952.90 | 197,300 | 998.20 | 18,200 | 745.50 | 99,100 | 899.30 |
| Widowers | 16,400 | 684.30 | 5,800 | 694.50 | 600 | 818.30 | 10,000 | 670.40 |
| Disabled widow(er)s | | | | | | | | |
| Total | 29,600 | 555.10 | 12,500 | 552.60 | 2,300 | 451.70 | 14,800 | 573.20 |
| By age | | | | | | | | |
| 50–54 | 11,000 | 529.70 | 4,900 | 542.60 | 1,100 | 381.90 | 5,000 | 549.40 |
| 55–59 | 15,400 | 576.90 | 5,600 | 562.60 | 900 | 594.50 | 8,900 | 584.10 |
| 60 or older | 3,200 | 537.20 | 2,000 | 549.20 | 300 | ^d | 900 | 596.70 |
| By basis of entitlement | | | | | | | | |
| Widows | 28,200 | 558.90 | 12,000 | 560.10 | 2,300 | 451.70 | 13,900 | 575.60 |
| Widowers | 1,400 | 478.10 | 500 | 373.90 | ... | ... | 900 | 535.90 |

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.

- a. Includes 300 persons of unknown race.
- b. Benefits awarded before the December increase are converted to the December rates before computation of the averages.
- c. Includes conversions from nondisabled widow(er)s benefits to higher retired-worker benefits.
- d. Average benefits are not shown for fewer than 500 beneficiaries.

CONTACT: 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 in month of award and sex, 2003

| Age | Total | | Men | | Women | |
|-------------------------|-----------|--|---------|--|---------|--|
| | Number | Average monthly benefit ^a (dollars) | Number | Average monthly benefit ^a (dollars) | Number | Average monthly benefit ^a (dollars) |
| Retired workers | | | | | | |
| Total ^b | 1,791,316 | 941.30 | 969,208 | 1,111.60 | 822,108 | 740.40 |
| 62–64 | 1,235,714 | 892.30 | 653,321 | 1,066.20 | 582,393 | 697.30 |
| 62 | 908,068 | 848.30 | 468,081 | 1,022.50 | 439,987 | 662.90 |
| 63 | 124,681 | 948.20 | 69,475 | 1,109.30 | 55,206 | 745.40 |
| 64 | 202,965 | 1,054.90 | 115,765 | 1,216.60 | 87,200 | 840.10 |
| 65–69 | 524,795 | 1,061.60 | 307,255 | 1,218.00 | 217,540 | 840.60 |
| 65 | 482,388 | 1,080.00 | 286,969 | 1,241.10 | 195,419 | 843.30 |
| Disability conversions | 198,045 | 930.20 | 113,629 | 1,095.00 | 84,416 | 708.40 |
| New entitlements | 284,343 | 1,184.30 | 173,340 | 1,336.90 | 111,003 | 946.00 |
| 66 | 16,758 | 865.90 | 9,236 | 938.00 | 7,522 | 777.50 |
| 67 | 10,689 | 827.10 | 4,950 | 848.80 | 5,739 | 808.30 |
| 68 | 8,103 | 835.50 | 3,411 | 840.20 | 4,692 | 832.10 |
| 69 | 6,857 | 878.00 | 2,689 | 879.10 | 4,168 | 877.30 |
| 70–74 | 24,862 | 899.40 | 6,599 | 822.00 | 18,263 | 927.40 |
| 75 or older | 5,945 | 674.40 | 2,033 | 567.10 | 3,912 | 730.20 |
| Disabled workers | | | | | | |
| Total | 777,461 | 936.40 | 421,598 | 1,062.30 | 355,863 | 787.30 |
| Under 25 | 24,697 | 478.70 | 14,323 | 486.80 | 10,374 | 467.40 |
| 25–29 | 28,861 | 637.50 | 15,192 | 657.90 | 13,669 | 614.90 |
| 30–34 | 39,577 | 731.60 | 20,205 | 761.70 | 19,372 | 700.10 |
| 35–39 | 57,095 | 794.10 | 29,394 | 843.30 | 27,701 | 741.80 |
| 40–44 | 83,586 | 854.40 | 43,116 | 933.20 | 40,470 | 770.40 |
| 45–49 | 104,643 | 921.50 | 53,972 | 1,029.60 | 50,671 | 806.30 |
| 50–54 | 139,744 | 990.30 | 74,388 | 1,129.70 | 65,356 | 831.60 |
| 50 | 26,928 | 959.40 | 14,179 | 1,086.90 | 12,749 | 817.50 |
| 51 | 26,855 | 977.00 | 14,072 | 1,111.30 | 12,783 | 829.10 |
| 52 | 27,351 | 989.30 | 14,618 | 1,129.00 | 12,733 | 829.00 |
| 53 | 28,154 | 1,002.70 | 15,043 | 1,146.50 | 13,111 | 837.80 |
| 54 | 30,456 | 1,018.80 | 16,476 | 1,167.80 | 13,980 | 843.10 |
| 55–59 | 172,772 | 1,052.00 | 96,299 | 1,224.50 | 76,473 | 834.70 |
| 55 | 38,328 | 1,038.00 | 21,328 | 1,197.50 | 17,000 | 838.00 |
| 56 | 37,983 | 1,052.10 | 20,798 | 1,221.70 | 17,185 | 846.70 |
| 57 | 31,499 | 1,053.20 | 17,510 | 1,229.90 | 13,989 | 832.00 |
| 58 | 31,675 | 1,052.90 | 17,845 | 1,230.50 | 13,830 | 823.60 |
| 59 | 33,287 | 1,066.00 | 18,818 | 1,247.60 | 14,469 | 829.80 |
| 60–65 | 126,486 | 1,071.50 | 74,709 | 1,244.10 | 51,777 | 822.50 |
| 60 | 36,367 | 1,078.80 | 21,114 | 1,256.60 | 15,253 | 832.80 |
| 61 | 32,505 | 1,083.40 | 19,224 | 1,257.90 | 13,281 | 831.00 |
| 62 | 27,823 | 1,089.60 | 16,592 | 1,266.10 | 11,231 | 828.90 |
| 63 | 16,595 | 1,053.10 | 9,863 | 1,222.30 | 6,732 | 805.30 |
| 64 | 11,410 | 1,013.50 | 6,851 | 1,167.40 | 4,559 | 782.20 |
| 65 | 1,786 | 964.90 | 1,065 | 1,102.30 | 721 | 762.00 |

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

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

CONTACT: Jennie H. Park (410) 965-9358 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, age in month of award, and sex, 2003

| Age | Total | | Men | | Women | |
|--|-----------|--|--------------------------------|--|---------|--|
| | Number | Average monthly benefit ^a (dollars) | Number | Average monthly benefit ^a (dollars) | Number | Average monthly benefit ^a (dollars) |
| | | | Retired workers | | | |
| Total | 1,348,118 | 906.10 | 718,330 | 1,079.00 | 629,788 | 708.80 |
| 62 | 908,068 | 848.30 | 468,081 | 1,022.50 | 439,987 | 662.90 |
| 63 | 124,681 | 948.20 | 69,475 | 1,109.30 | 55,206 | 745.40 |
| 64 | 201,815 | 1,055.60 | 115,104 | 1,217.50 | 86,711 | 840.80 |
| 65 | 112,543 | 1,060.10 | 65,050 | 1,212.10 | 47,493 | 851.80 |
| 66 or older | 1,011 | 603.90 | 620 | 617.10 | 391 | 582.80 |
| | | | Disabled workers | | | |
| Total | 28,496 | 1,047.30 | 17,966 | 1,199.30 | 10,530 | 788.00 |
| 62 | 8,448 | 1,107.10 | 5,507 | 1,253.80 | 2,941 | 832.20 |
| 63 | 10,323 | 1,051.50 | 6,482 | 1,207.00 | 3,841 | 789.10 |
| 64 | 8,358 | 995.60 | 5,151 | 1,147.50 | 3,207 | 751.60 |
| 65 | 1,367 | 962.60 | 826 | 1,097.80 | 541 | 756.20 |
| | | | Wives and husbands | | | |
| Total | 251,447 | 346.00 | ... | ... | 251,447 | 346.00 |
| | | | By basis of entitlement | | | |
| Wives and husbands of retired workers | 229,777 | 351.50 | 4,272 | 240.50 | 225,505 | 353.60 |
| Wives and husbands of disabled workers | 21,670 | 288.50 | 666 | 195.70 | 21,004 | 291.40 |
| | | | By sex | | | |
| Wives | 246,509 | 348.30 | ... | ... | 246,509 | 348.30 |
| 62 | 141,741 | 338.30 | ... | ... | 141,741 | 338.30 |
| 63 | 35,953 | 336.00 | ... | ... | 35,953 | 336.00 |
| 64 | 44,014 | 380.90 | ... | ... | 44,014 | 380.90 |
| 65 | 19,782 | 382.10 | ... | ... | 19,782 | 382.10 |
| 66 | 1,591 | 307.30 | ... | ... | 1,591 | 307.30 |
| 67 or older | 3,428 | 295.60 | ... | ... | 3,428 | 295.60 |
| Husbands | 4,938 | 234.40 | 4,938 | 234.40 | ... | ... |
| | | | Nondisabled widow(er)s | | | |
| Total | 185,807 | 844.40 | 13,757 | 662.20 | 172,050 | 858.90 |
| Nondisabled widows | 172,050 | 858.90 | ... | ... | 172,050 | 858.90 |
| 60 | 67,320 | 896.00 | ... | ... | 67,320 | 896.00 |
| 61 | 21,493 | 914.00 | ... | ... | 21,493 | 914.00 |
| 62 | 20,324 | 872.30 | ... | ... | 20,324 | 872.30 |
| 63 | 14,290 | 821.00 | ... | ... | 14,290 | 821.00 |
| 64 | 21,390 | 881.70 | ... | ... | 21,390 | 881.70 |
| 65 | 16,858 | 701.10 | ... | ... | 16,858 | 701.10 |
| 66 | 712 | 791.70 | ... | ... | 712 | 791.70 |
| 67-69 | 1,909 | 794.80 | ... | ... | 1,909 | 794.80 |
| 70 or older | 7,754 | 720.90 | ... | ... | 7,754 | 720.90 |
| Nondisabled widowers | 13,757 | 662.20 | 13,757 | 662.20 | ... | ... |

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

NOTE: ... = not applicable.

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

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.A OASDI Benefits Awarded: Summary

Table 6.A6—Number, percentage distribution, and average monthly benefit for retired and disabled workers, by state or other area, 2003

| State or area | Retired workers | | | Disabled workers | | |
|------------------------|-----------------|---------|--|------------------|---------|--|
| | Number | Percent | Average monthly benefit ^a (dollars) | Number | Percent | Average monthly benefit ^a (dollars) |
| All areas ^b | 1,791,316 | 100.0 | 941.30 | 777,461 | 100.0 | 936.40 |
| Alabama | 29,850 | 1.7 | 916.00 | 19,315 | 2.5 | 916.30 |
| Alaska | 3,130 | 0.2 | 888.50 | 1,247 | 0.2 | 922.30 |
| Arizona | 33,659 | 1.9 | 954.90 | 14,968 | 1.9 | 945.40 |
| Arkansas | 19,618 | 1.1 | 881.90 | 12,765 | 1.6 | 885.70 |
| California | 177,343 | 9.9 | 931.40 | 73,830 | 9.5 | 892.70 |
| Colorado | 23,979 | 1.3 | 929.70 | 7,921 | 1.0 | 963.30 |
| Connecticut | 22,267 | 1.2 | 1,036.30 | 7,899 | 1.0 | 1,010.80 |
| Delaware | 5,509 | 0.3 | 1,005.10 | 2,637 | 0.3 | 987.50 |
| District of Columbia | 2,861 | 0.2 | 835.70 | 1,317 | 0.2 | 858.30 |
| Florida | 121,546 | 6.8 | 915.10 | 42,501 | 5.5 | 933.20 |
| Georgia | 48,254 | 2.7 | 929.90 | 22,302 | 2.9 | 939.10 |
| Hawaii | 7,508 | 0.4 | 945.00 | 2,226 | 0.3 | 975.10 |
| Idaho | 8,434 | 0.5 | 910.80 | 3,460 | 0.4 | 910.00 |
| Illinois | 73,065 | 4.1 | 966.90 | 28,419 | 3.7 | 980.90 |
| Indiana | 40,183 | 2.2 | 1,001.10 | 17,440 | 2.2 | 957.10 |
| Iowa | 19,663 | 1.1 | 944.10 | 6,283 | 0.8 | 915.70 |
| Kansas | 16,265 | 0.9 | 964.10 | 6,329 | 0.8 | 941.60 |
| Kentucky | 26,137 | 1.5 | 900.40 | 17,196 | 2.2 | 903.90 |
| Louisiana | 24,148 | 1.3 | 868.70 | 13,731 | 1.8 | 894.50 |
| Maine | 9,057 | 0.5 | 874.80 | 5,401 | 0.7 | 860.00 |
| Maryland | 31,591 | 1.8 | 963.80 | 11,565 | 1.5 | 987.10 |
| Massachusetts | 37,576 | 2.1 | 952.30 | 17,855 | 2.3 | 934.80 |
| Michigan | 62,721 | 3.5 | 1,029.80 | 28,850 | 3.7 | 993.80 |
| Minnesota | 30,486 | 1.7 | 977.00 | 11,158 | 1.4 | 951.30 |
| Mississippi | 18,054 | 1.0 | 880.40 | 11,009 | 1.4 | 895.70 |
| Missouri | 37,782 | 2.1 | 926.30 | 18,357 | 2.4 | 929.40 |
| Montana | 6,459 | 0.4 | 884.40 | 2,154 | 0.3 | 886.30 |
| Nebraska | 10,305 | 0.6 | 931.10 | 3,934 | 0.5 | 901.10 |
| Nevada | 15,519 | 0.9 | 930.40 | 5,926 | 0.8 | 972.30 |
| New Hampshire | 8,369 | 0.5 | 978.60 | 4,048 | 0.5 | 951.50 |
| New Jersey | 53,641 | 3.0 | 1,041.40 | 20,392 | 2.6 | 1,057.50 |
| New Mexico | 11,422 | 0.6 | 864.50 | 5,376 | 0.7 | 870.90 |
| New York | 116,982 | 6.5 | 992.40 | 46,371 | 6.0 | 1,005.10 |
| North Carolina | 56,627 | 3.2 | 937.60 | 28,460 | 3.7 | 933.90 |
| North Dakota | 3,819 | 0.2 | 867.10 | 1,150 | 0.1 | 887.00 |
| Ohio | 70,703 | 3.9 | 951.70 | 28,287 | 3.6 | 925.20 |
| Oklahoma | 23,807 | 1.3 | 902.70 | 11,538 | 1.5 | 899.90 |
| Oregon | 24,189 | 1.4 | 942.10 | 8,820 | 1.1 | 963.10 |
| Pennsylvania | 82,032 | 4.6 | 982.20 | 37,044 | 4.8 | 937.60 |
| Rhode Island | 6,318 | 0.4 | 948.00 | 3,318 | 0.4 | 879.10 |
| South Carolina | 28,816 | 1.6 | 933.30 | 14,602 | 1.9 | 938.50 |
| South Dakota | 4,783 | 0.3 | 881.20 | 1,394 | 0.2 | 850.40 |
| Tennessee | 40,016 | 2.2 | 927.60 | 19,923 | 2.6 | 917.40 |
| Texas | 112,302 | 6.3 | 908.50 | 53,031 | 6.8 | 913.70 |
| Utah | 10,295 | 0.6 | 947.90 | 3,176 | 0.4 | 951.90 |

(Continued)

6.A OASDI Benefits Awarded: Summary

Table 6.A6—Number, percentage distribution, and average monthly benefit for retired and disabled workers, by state or other area, 2003—Continued

| State or area | Retired workers | | | Disabled workers | | |
|--------------------|-----------------|---------|--|------------------|---------|--|
| | Number | Percent | Average monthly benefit ^a (dollars) | Number | Percent | Average monthly benefit ^a (dollars) |
| Vermont | 4,217 | 0.2 | 940.10 | 1,761 | 0.2 | 893.00 |
| Virginia | 44,501 | 2.5 | 947.00 | 19,361 | 2.5 | 950.50 |
| Washington | 36,290 | 2.0 | 986.90 | 15,196 | 2.0 | 970.90 |
| West Virginia | 12,681 | 0.7 | 936.30 | 9,086 | 1.2 | 936.30 |
| Wisconsin | 35,567 | 2.0 | 983.10 | 13,834 | 1.8 | 967.50 |
| Wyoming | 3,402 | 0.2 | 946.90 | 1,030 | 0.1 | 950.40 |
| Outlying areas | | | | | | |
| Puerto Rico | 21,710 | 1.2 | 627.30 | 10,919 | 1.4 | 811.10 |
| Other ^c | 15,858 | 0.9 | 499.80 | 1,349 | 0.2 | 729.00 |

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

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

CONTACT: 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 sex and age in month of award, 2003

| Age | All initial awards ^a | Benefits received for all entitlement months ^b | Benefits withheld due to earnings for— | | |
|---|---------------------------------|---|--|--|--|
| | | | All entitlement months | Less than one-half of entitlement months | One-half or more of entitlement months |
| Number | | | | | |
| <i>All beneficiaries</i> | | | | | |
| Total | 1,208,100 | 1,128,600 | 27,300 | 29,100 | 17,100 |
| 62 | 884,300 | 833,600 | 16,600 | 19,300 | 11,100 |
| 63 | 125,000 | 111,000 | 5,600 | 4,600 | 2,900 |
| 64 | 198,800 | 184,000 | 5,100 | 5,200 | 3,100 |
| <i>Men</i> | | | | | |
| Subtotal | 632,300 | 588,400 | 15,300 | 16,900 | 8,500 |
| 62 | 452,200 | 423,800 | 9,500 | 11,200 | 5,600 |
| 63 | 66,000 | 59,100 | 2,600 | 2,400 | 1,300 |
| 64 | 114,100 | 105,500 | 3,200 | 3,300 | 1,600 |
| <i>Women</i> | | | | | |
| Subtotal | 575,800 | 540,200 | 12,000 | 12,200 | 8,600 |
| 62 | 432,100 | 409,800 | 7,100 | 8,100 | 5,500 |
| 63 | 59,000 | 51,900 | 3,000 | 2,200 | 1,600 |
| 64 | 84,700 | 78,500 | 1,900 | 1,900 | 1,500 |
| Average primary insurance amount^c (dollars) | | | | | |
| <i>All beneficiaries</i> | | | | | |
| Total | 1,077.10 | 1,072.90 | 1,144.60 | 1,170.80 | 1,131.80 |
| 62 | 1,073.00 | 1,069.90 | 1,126.70 | 1,140.10 | 1,121.40 |
| 63 | 1,086.40 | 1,085.90 | 1,071.40 | 1,144.00 | 1,111.90 |
| 64 | 1,089.10 | 1,078.40 | 1,283.10 | 1,308.80 | 1,187.60 |
| <i>Men</i> | | | | | |
| Subtotal | 1,299.90 | 1,296.40 | 1,367.60 | 1,362.70 | 1,376.30 |
| 62 | 1,309.20 | 1,308.20 | 1,327.10 | 1,322.00 | 1,363.70 |
| 63 | 1,298.70 | 1,295.50 | 1,401.10 | 1,349.20 | 1,350.60 |
| 64 | 1,264.10 | 1,249.40 | 1,460.40 | 1,510.60 | 1,441.20 |
| <i>Women</i> | | | | | |
| Subtotal | 832.30 | 829.50 | 860.30 | 905.00 | 890.20 |
| 62 | 825.90 | 823.60 | 858.60 | 888.40 | 874.80 |
| 63 | 849.00 | 847.10 | 785.70 | 920.30 | 917.90 |
| 64 | 853.40 | 848.70 | 984.50 | 958.20 | 917.20 |
| Average monthly benefit^c (dollars) | | | | | |
| <i>All beneficiaries</i> | | | | | |
| Total | 895.70 | 891.90 | 959.90 | 976.60 | 943.90 |
| 62 | 851.90 | 849.90 | 885.40 | 900.00 | 882.00 |
| 63 | 948.00 | 947.10 | 944.40 | 987.20 | 984.60 |
| 64 | 1,057.70 | 1,048.90 | 1,219.20 | 1,251.40 | 1,127.60 |
| <i>Men</i> | | | | | |
| Subtotal | 1,061.00 | 1,056.80 | 1,140.10 | 1,129.70 | 1,135.80 |
| 62 | 1,016.00 | 1,014.90 | 1,037.10 | 1,028.80 | 1,064.20 |
| 63 | 1,115.30 | 1,112.00 | 1,207.50 | 1,166.60 | 1,163.20 |
| 64 | 1,208.20 | 1,194.50 | 1,391.10 | 1,445.40 | 1,364.40 |
| <i>Women</i> | | | | | |
| Subtotal | 714.10 | 712.20 | 730.10 | 764.50 | 754.30 |
| 62 | 680.10 | 679.20 | 682.50 | 722.00 | 696.60 |
| 63 | 760.90 | 759.40 | 716.40 | 791.60 | 839.40 |
| 64 | 854.90 | 853.30 | 929.70 | 914.50 | 875.10 |

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

NOTE: Excludes persons whose benefits were converted from disabled worker to retired worker in 2003. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

- a. Includes 6,000 awards for which benefits were withheld for reasons other than earnings.
- b. Months of entitlements begin with the month of award and end either in December 2003 or the month before the retired-worker benefit is terminated.
- c. Amount for December 2003 or the amount for the latest month of entitlement multiplied by the December benefit increase.

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 sex and monthly benefit, 2003

| Sex and monthly benefit (dollars) | Total | | Without reduction for early retirement | | With reduction for early retirement | |
|-----------------------------------|-----------|---------|--|---------|-------------------------------------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| All retired workers | 1,791,316 | 100.0 | 443,198 | 100.0 | 1,348,118 | 100.0 |
| Less than 500.00 | 266,115 | 14.9 | 51,484 | 11.6 | 214,631 | 15.9 |
| 500.00–549.90 | 77,674 | 4.3 | 13,915 | 3.1 | 63,759 | 4.7 |
| 550.00–599.90 | 84,836 | 4.7 | 15,686 | 3.5 | 69,150 | 5.1 |
| 600.00–649.90 | 85,598 | 4.8 | 16,052 | 3.6 | 69,546 | 5.2 |
| 650.00–699.90 | 77,738 | 4.3 | 16,302 | 3.7 | 61,436 | 4.6 |
| 700.00–749.90 | 70,407 | 3.9 | 16,476 | 3.7 | 53,931 | 4.0 |
| 750.00–799.90 | 67,451 | 3.8 | 16,137 | 3.6 | 51,314 | 3.8 |
| 800.00–849.90 | 66,794 | 3.7 | 16,926 | 3.8 | 49,868 | 3.7 |
| 850.00–899.90 | 63,112 | 3.5 | 15,841 | 3.6 | 47,271 | 3.5 |
| 900.00–949.90 | 62,126 | 3.5 | 15,901 | 3.6 | 46,225 | 3.4 |
| 950.00–999.90 | 61,612 | 3.4 | 15,631 | 3.5 | 45,981 | 3.4 |
| 1,000.00–1,049.90 | 60,019 | 3.4 | 15,316 | 3.5 | 44,703 | 3.3 |
| 1,050.00–1,099.90 | 59,162 | 3.3 | 14,953 | 3.4 | 44,209 | 3.3 |
| 1,100.00–1,149.90 | 57,475 | 3.2 | 14,486 | 3.3 | 42,989 | 3.2 |
| 1,150.00–1,199.90 | 58,560 | 3.3 | 13,768 | 3.1 | 44,792 | 3.3 |
| 1,200.00–1,249.90 | 82,206 | 4.6 | 13,388 | 3.0 | 68,818 | 5.1 |
| 1,250.00–1,299.90 | 82,396 | 4.6 | 13,040 | 2.9 | 69,356 | 5.1 |
| 1,300.00–1,349.90 | 77,854 | 4.3 | 14,401 | 3.2 | 63,453 | 4.7 |
| 1,350.00–1,399.90 | 72,274 | 4.0 | 14,240 | 3.2 | 58,034 | 4.3 |
| 1,400.00–1,449.90 | 59,767 | 3.3 | 12,849 | 2.9 | 46,918 | 3.5 |
| 1,450.00–1,499.90 | 41,152 | 2.3 | 15,487 | 3.5 | 25,665 | 1.9 |
| 1,500.00 or more | 156,988 | 8.8 | 90,919 | 20.5 | 66,069 | 4.9 |
| Average benefit (dollars) | 941.30 | | 1,040.38 | | 906.10 | |
| Men | 969,208 | 100.0 | 250,878 | 100.0 | 718,330 | 100.0 |
| Less than 500.00 | 85,520 | 8.8 | 20,006 | 8.0 | 65,514 | 9.1 |
| 500.00–549.90 | 18,913 | 2.0 | 4,234 | 1.7 | 14,679 | 2.0 |
| 550.00–599.90 | 19,981 | 2.1 | 4,883 | 1.9 | 15,098 | 2.1 |
| 600.00–649.90 | 20,739 | 2.1 | 5,129 | 2.0 | 15,610 | 2.2 |
| 650.00–699.90 | 21,603 | 2.2 | 5,299 | 2.1 | 16,304 | 2.3 |
| 700.00–749.90 | 23,204 | 2.4 | 5,499 | 2.2 | 17,705 | 2.5 |
| 750.00–799.90 | 24,690 | 2.5 | 5,893 | 2.3 | 18,797 | 2.6 |
| 800.00–849.90 | 26,894 | 2.8 | 6,471 | 2.6 | 20,423 | 2.8 |
| 850.00–899.90 | 28,434 | 2.9 | 6,577 | 2.6 | 21,857 | 3.0 |
| 900.00–949.90 | 30,590 | 3.2 | 7,138 | 2.8 | 23,452 | 3.3 |
| 950.00–999.90 | 32,972 | 3.4 | 7,499 | 3.0 | 25,473 | 3.5 |
| 1,000.00–1,049.90 | 34,327 | 3.5 | 7,655 | 3.1 | 26,672 | 3.7 |
| 1,050.00–1,099.90 | 36,140 | 3.7 | 7,989 | 3.2 | 28,151 | 3.9 |
| 1,100.00–1,149.90 | 37,358 | 3.9 | 8,129 | 3.2 | 29,229 | 4.1 |
| 1,150.00–1,199.90 | 40,870 | 4.2 | 8,230 | 3.3 | 32,640 | 4.5 |
| 1,200.00–1,249.90 | 63,058 | 6.5 | 8,631 | 3.4 | 54,427 | 7.6 |
| 1,250.00–1,299.90 | 66,837 | 6.9 | 8,729 | 3.5 | 58,108 | 8.1 |
| 1,300.00–1,349.90 | 65,707 | 6.8 | 10,487 | 4.2 | 55,220 | 7.7 |
| 1,350.00–1,399.90 | 63,208 | 6.5 | 10,905 | 4.3 | 52,303 | 7.3 |
| 1,400.00–1,449.90 | 52,892 | 5.5 | 9,929 | 4.0 | 42,963 | 6.0 |
| 1,450.00–1,499.90 | 34,508 | 3.6 | 11,938 | 4.8 | 22,570 | 3.1 |
| 1,500.00 or more | 140,763 | 14.5 | 79,628 | 31.7 | 61,135 | 8.5 |
| Average benefit (dollars) | 1,111.60 | | 1,205.00 | | 1,079.00 | |

(Continued)

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B3—Number and percentage distribution with and without reduction for early retirement, by sex and monthly benefit, 2003—Continued

| Sex and monthly benefit (dollars) | Total | | Without reduction for early retirement | | With reduction for early retirement | |
|-----------------------------------|---------|---------|--|---------|-------------------------------------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| Women | 822,108 | 100.0 | 192,320 | 100.0 | 629,788 | 100.0 |
| Less than 500.00 | 180,595 | 22.0 | 31,478 | 16.4 | 149,117 | 23.7 |
| 500.00–549.90 | 58,761 | 7.1 | 9,681 | 5.0 | 49,080 | 7.8 |
| 550.00–599.90 | 64,855 | 7.9 | 10,803 | 5.6 | 54,052 | 8.6 |
| 600.00–649.90 | 64,859 | 7.9 | 10,923 | 5.7 | 53,936 | 8.6 |
| 650.00–699.90 | 56,135 | 6.8 | 11,003 | 5.7 | 45,132 | 7.2 |
| 700.00–749.90 | 47,203 | 5.7 | 10,977 | 5.7 | 36,226 | 5.8 |
| 750.00–799.90 | 42,761 | 5.2 | 10,244 | 5.3 | 32,517 | 5.2 |
| 800.00–849.90 | 39,900 | 4.9 | 10,455 | 5.4 | 29,445 | 4.7 |
| 850.00–899.90 | 34,678 | 4.2 | 9,264 | 4.8 | 25,414 | 4.0 |
| 900.00–949.90 | 31,536 | 3.8 | 8,763 | 4.6 | 22,773 | 3.6 |
| 950.00–999.90 | 28,640 | 3.5 | 8,132 | 4.2 | 20,508 | 3.3 |
| 1,000.00–1,049.90 | 25,692 | 3.1 | 7,661 | 4.0 | 18,031 | 2.9 |
| 1,050.00–1,099.90 | 23,022 | 2.8 | 6,964 | 3.6 | 16,058 | 2.5 |
| 1,100.00–1,149.90 | 20,117 | 2.4 | 6,357 | 3.3 | 13,760 | 2.2 |
| 1,150.00–1,199.90 | 17,690 | 2.2 | 5,538 | 2.9 | 12,152 | 1.9 |
| 1,200.00–1,249.90 | 19,148 | 2.3 | 4,757 | 2.5 | 14,391 | 2.3 |
| 1,250.00–1,299.90 | 15,559 | 1.9 | 4,311 | 2.2 | 11,248 | 1.8 |
| 1,300.00–1,349.90 | 12,147 | 1.5 | 3,914 | 2.0 | 8,233 | 1.3 |
| 1,350.00–1,399.90 | 9,066 | 1.1 | 3,335 | 1.7 | 5,731 | 0.9 |
| 1,400.00–1,449.90 | 6,875 | 0.8 | 2,920 | 1.5 | 3,955 | 0.6 |
| 1,450.00–1,499.90 | 6,644 | 0.8 | 3,549 | 1.8 | 3,095 | 0.5 |
| 1,500.00 or more | 16,225 | 2.0 | 11,291 | 5.9 | 4,934 | 0.8 |
| Average benefit (dollars) | 740.40 | | 844.00 | | 708.80 | |

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

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

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B4—Number and percentage distribution with and without reduction for early retirement, by sex and primary insurance amount, 2003

| Sex and primary insurance amount (dollars) | Total | | Without reduction for early retirement | | With reduction for early retirement | |
|--|-----------|---------|--|---------|-------------------------------------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| All retired workers | 1,791,316 | 100.0 | 443,198 | 100.0 | 1,348,118 | 100.0 |
| Less than 500.00 | 216,317 | 12.1 | 55,764 | 12.6 | 160,553 | 11.9 |
| 500.00–549.90 | 40,810 | 2.3 | 15,734 | 3.6 | 25,076 | 1.9 |
| 550.00–599.90 | 69,817 | 3.9 | 16,977 | 3.8 | 52,840 | 3.9 |
| 600.00–649.90 | 70,441 | 3.9 | 17,103 | 3.9 | 53,338 | 4.0 |
| 650.00–699.90 | 68,316 | 3.8 | 16,988 | 3.8 | 51,328 | 3.8 |
| 700.00–749.90 | 65,133 | 3.6 | 16,642 | 3.8 | 48,491 | 3.6 |
| 750.00–799.90 | 63,348 | 3.5 | 16,483 | 3.7 | 46,865 | 3.5 |
| 800.00–849.90 | 62,502 | 3.5 | 16,824 | 3.8 | 45,678 | 3.4 |
| 850.00–899.90 | 59,895 | 3.3 | 15,801 | 3.6 | 44,094 | 3.3 |
| 900.00–949.90 | 58,518 | 3.3 | 15,807 | 3.6 | 42,711 | 3.2 |
| 950.00–999.90 | 57,021 | 3.2 | 15,288 | 3.4 | 41,733 | 3.1 |
| 1,000.00–1,049.90 | 55,027 | 3.1 | 14,564 | 3.3 | 40,463 | 3.0 |
| 1,050.00–1,099.90 | 54,038 | 3.0 | 14,074 | 3.2 | 39,964 | 3.0 |
| 1,100.00–1,149.90 | 52,164 | 2.9 | 13,615 | 3.1 | 38,549 | 2.9 |
| 1,150.00–1,199.90 | 50,838 | 2.8 | 12,920 | 2.9 | 37,918 | 2.8 |
| 1,200.00–1,249.90 | 50,074 | 2.8 | 12,606 | 2.8 | 37,468 | 2.8 |
| 1,250.00–1,299.90 | 49,278 | 2.8 | 12,311 | 2.8 | 36,967 | 2.7 |
| 1,300.00–1,349.90 | 50,041 | 2.8 | 14,035 | 3.2 | 36,006 | 2.7 |
| 1,350.00–1,399.90 | 49,613 | 2.8 | 14,115 | 3.2 | 35,498 | 2.6 |
| 1,400.00–1,449.90 | 47,247 | 2.6 | 12,853 | 2.9 | 34,394 | 2.6 |
| 1,450.00–1,499.90 | 54,901 | 3.1 | 15,346 | 3.5 | 39,555 | 2.9 |
| 1,500.00 or more | 445,977 | 24.9 | 87,348 | 19.7 | 358,629 | 26.6 |
| Average primary insurance amount (dollars) | 1,068.20 | | 1,027.90 | | 1,081.50 | |
| Men | 969,208 | 100.0 | 250,878 | 100.0 | 718,330 | 100.0 |
| Less than 500.00 | 66,403 | 6.9 | 20,736 | 8.3 | 45,667 | 6.4 |
| 500.00–549.90 | 10,569 | 1.1 | 4,535 | 1.8 | 6,034 | 0.8 |
| 550.00–599.90 | 15,999 | 1.7 | 4,906 | 2.0 | 11,093 | 1.5 |
| 600.00–649.90 | 16,869 | 1.7 | 5,110 | 2.0 | 11,759 | 1.6 |
| 650.00–699.90 | 17,470 | 1.8 | 5,270 | 2.1 | 12,200 | 1.7 |
| 700.00–749.90 | 17,541 | 1.8 | 5,435 | 2.2 | 12,106 | 1.7 |
| 750.00–799.90 | 18,730 | 1.9 | 5,946 | 2.4 | 12,784 | 1.8 |
| 800.00–849.90 | 19,988 | 2.1 | 6,428 | 2.6 | 13,560 | 1.9 |
| 850.00–899.90 | 20,936 | 2.2 | 6,587 | 2.6 | 14,349 | 2.0 |
| 900.00–949.90 | 22,461 | 2.3 | 7,117 | 2.8 | 15,344 | 2.1 |
| 950.00–999.90 | 23,767 | 2.5 | 7,474 | 3.0 | 16,293 | 2.3 |
| 1,000.00–1,049.90 | 25,131 | 2.6 | 7,619 | 3.0 | 17,512 | 2.4 |
| 1,050.00–1,099.90 | 26,815 | 2.8 | 7,959 | 3.2 | 18,856 | 2.6 |
| 1,100.00–1,149.90 | 28,212 | 2.9 | 8,102 | 3.2 | 20,110 | 2.8 |
| 1,150.00–1,199.90 | 29,645 | 3.1 | 8,231 | 3.3 | 21,414 | 3.0 |
| 1,200.00–1,249.90 | 31,306 | 3.2 | 8,626 | 3.4 | 22,680 | 3.2 |
| 1,250.00–1,299.90 | 32,668 | 3.4 | 8,750 | 3.5 | 23,918 | 3.3 |
| 1,300.00–1,349.90 | 35,130 | 3.6 | 10,578 | 4.2 | 24,552 | 3.4 |
| 1,350.00–1,399.90 | 36,353 | 3.8 | 11,148 | 4.4 | 25,205 | 3.5 |
| 1,400.00–1,449.90 | 35,651 | 3.7 | 10,271 | 4.1 | 25,380 | 3.5 |
| 1,450.00–1,499.90 | 42,679 | 4.4 | 12,123 | 4.8 | 30,556 | 4.3 |
| 1,500.00 or more | 394,885 | 40.7 | 77,927 | 31.1 | 316,958 | 44.1 |
| Average primary insurance amount (dollars) | 1,274.30 | | 1,196.70 | | 1,301.40 | |

(Continued)

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B4—Number and percentage distribution with and without reduction for early retirement, by sex and primary insurance amount, 2003—Continued

| Sex and primary insurance amount (dollars) | Total | | Without reduction for early retirement | | With reduction for early retirement | |
|--|---------|---------|--|---------|-------------------------------------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| Women | 822,108 | 100.0 | 192,320 | 100.0 | 629,788 | 100.0 |
| Less than 500.00 | 149,914 | 18.2 | 35,028 | 18.2 | 114,886 | 18.2 |
| 500.00–549.90 | 30,241 | 3.7 | 11,199 | 5.8 | 19,042 | 3.0 |
| 550.00–599.90 | 53,818 | 6.5 | 12,071 | 6.3 | 41,747 | 6.6 |
| 600.00–649.90 | 53,572 | 6.5 | 11,993 | 6.2 | 41,579 | 6.6 |
| 650.00–699.90 | 50,846 | 6.2 | 11,718 | 6.1 | 39,128 | 6.2 |
| 700.00–749.90 | 47,592 | 5.8 | 11,207 | 5.8 | 36,385 | 5.8 |
| 750.00–799.90 | 44,618 | 5.4 | 10,537 | 5.5 | 34,081 | 5.4 |
| 800.00–849.90 | 42,514 | 5.2 | 10,396 | 5.4 | 32,118 | 5.1 |
| 850.00–899.90 | 38,959 | 4.7 | 9,214 | 4.8 | 29,745 | 4.7 |
| 900.00–949.90 | 36,057 | 4.4 | 8,690 | 4.5 | 27,367 | 4.3 |
| 950.00–999.90 | 33,254 | 4.0 | 7,814 | 4.1 | 25,440 | 4.0 |
| 1,000.00–1,049.90 | 29,896 | 3.6 | 6,945 | 3.6 | 22,951 | 3.6 |
| 1,050.00–1,099.90 | 27,223 | 3.3 | 6,115 | 3.2 | 21,108 | 3.4 |
| 1,100.00–1,149.90 | 23,952 | 2.9 | 5,513 | 2.9 | 18,439 | 2.9 |
| 1,150.00–1,199.90 | 21,193 | 2.6 | 4,689 | 2.4 | 16,504 | 2.6 |
| 1,200.00–1,249.90 | 18,768 | 2.3 | 3,980 | 2.1 | 14,788 | 2.3 |
| 1,250.00–1,299.90 | 16,610 | 2.0 | 3,561 | 1.9 | 13,049 | 2.1 |
| 1,300.00–1,349.90 | 14,911 | 1.8 | 3,457 | 1.8 | 11,454 | 1.8 |
| 1,350.00–1,399.90 | 13,260 | 1.6 | 2,967 | 1.5 | 10,293 | 1.6 |
| 1,400.00–1,449.90 | 11,596 | 1.4 | 2,582 | 1.3 | 9,014 | 1.4 |
| 1,450.00–1,499.90 | 12,222 | 1.5 | 3,223 | 1.7 | 8,999 | 1.4 |
| 1,500.00 or more | 51,092 | 6.2 | 9,421 | 4.9 | 41,671 | 6.6 |
| Average primary insurance amount (dollars) | 825.30 | | 807.80 | | 830.60 | |

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

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

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B5—Number, average age, and percentage distribution, by sex and age, selected years 1940–2003

| Year | Number (thousands) | Average age | Percentage distribution by age ^a | | | | | | | | | |
|-------------------|-----------------------|----------------|---|------|------|------|-------|-------------------|---------------------------|-------|-------|----------------|
| | | | Total, all ages | 62 | 63 | 64 | 65 | | | 66–69 | 70–74 | 75 or older |
| | | | | | | | Total | Newly entitled | Disability conversions | | | |
| <i>Men</i> | | | | | | | | | | | | |
| 1940 | 117 | 68.1 | 100.0 | ... | ... | ... | 17.1 | 17.1 | ... | 58.8 | 16.5 | 7.6 |
| 1945 | 166 | 69.6 | 100.0 | ... | ... | ... | 15.9 | 15.9 | ... | 43.3 | 28.1 | 12.7 |
| 1950 | 444 | 68.7 | 100.0 | ... | ... | ... | 21.9 | 21.9 | ... | 47.3 | 21.0 | 9.8 |
| 1955 | 629 | 68.4 | 100.0 | ... | ... | ... | 29.4 | 29.4 | ... | 38.0 | 24.7 | 7.8 |
| 1960 | 630 | 66.8 | 100.0 | ... | ... | ... | 48.1 | 42.3 | 5.8 | 36.6 | 13.2 | 2.1 |
| 1965 | 743 | 65.7 | 100.0 | 15.6 | 10.0 | 6.0 | 31.6 | 25.8 | 5.8 | 25.9 | 7.7 | 3.2 |
| 1970 | 814 | 64.4 | 100.0 | 19.0 | 12.8 | 8.5 | 48.7 | 39.6 | 9.1 | 9.3 | 1.3 | 0.4 |
| 1975 | 902 | 64.0 | 100.0 | 25.8 | 14.1 | 9.0 | 43.6 | 32.0 | 11.6 | 6.5 | 0.7 | 0.2 |
| 1980 | 942 | 63.9 | 100.0 | 30.1 | 13.1 | 8.5 | 42.4 | 31.8 | 10.6 | 5.2 | 0.6 | 0.1 |
| 1985 | 986 | 63.7 | 100.0 | 45.5 | 8.2 | 11.6 | 31.2 | 18.2 | 13.1 | 2.9 | 0.5 | 0.2 |
| 1986 | 1,011 | 63.7 | 100.0 | 47.0 | 8.2 | 11.8 | 29.2 | 17.2 | 12.0 | 3.1 | 0.6 | 0.1 |
| 1987 | 970 | 63.6 | 100.0 | 47.6 | 8.1 | 11.4 | 28.8 | 16.8 | 12.0 | 3.4 | 0.6 | 0.1 |
| 1988 | 944 | 63.7 | 100.0 | 48.2 | 8.1 | 9.9 | 28.6 | 16.6 | 12.0 | 4.1 | 0.9 | 0.2 |
| 1989 | 983 | 63.7 | 100.0 | 48.0 | 7.1 | 9.3 | 30.1 | 17.5 | 12.6 | 4.6 | 0.7 | 0.2 |
| 1990 | 964 | 63.7 | 100.0 | 47.2 | 7.6 | 11.3 | 27.6 | 16.4 | 11.1 | 5.1 | 1.0 | 0.2 |
| 1991 | 996 | 63.7 | 100.0 | 46.8 | 8.1 | 10.9 | 27.9 | 17.2 | 10.7 | 5.1 | 0.9 | 0.2 |
| 1992 | 989 | 63.7 | 100.0 | 48.2 | 7.3 | 11.4 | 27.2 | 16.6 | 10.6 | 5.0 | 0.8 | 0.1 |
| 1993 | 980 | 63.7 | 100.0 | 48.7 | 8.0 | 11.0 | 26.7 | 16.1 | 10.5 | 4.5 | 0.9 | 0.2 |
| 1994 | 923 | 63.6 | 100.0 | 49.0 | 7.4 | 11.4 | 27.1 | 15.7 | 11.5 | 4.0 | 1.0 | 0.1 |
| 1995 | 916 | 63.7 | 100.0 | 49.3 | 7.3 | 10.5 | 27.5 | 15.8 | 11.8 | 4.0 | 1.1 | 0.3 |
| 1996 | 895 | 63.6 | 100.0 | 49.9 | 7.1 | 9.7 | 27.6 | 14.9 | 12.6 | 4.5 | 1.1 | 0.1 |
| 1997 ^b | 904 | 63.7 | 100.0 | 50.5 | 6.6 | 9.7 | 26.9 | 14.9 | 12.0 | 4.7 | 1.3 | 0.2 |
| 1998 ^b | 909 | 63.8 | 100.0 | 49.6 | 7.1 | 9.9 | 27.3 | 14.7 | 12.6 | 4.6 | 1.3 | 0.2 |
| 1999 ^b | 940 | 63.7 | 100.0 | 49.3 | 7.3 | 9.8 | 27.4 | 14.8 | 12.6 | 4.7 | 1.3 | 0.2 |
| 2000 ^b | 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 ^b | 992 | 63.7 | 100.0 | 46.8 | 6.7 | 12.1 | 30.8 | 18.1 | 12.7 | 2.8 | 0.7 | 0.2 |
| 2002 ^b | 1,001 | 63.7 | 100.0 | 46.4 | 7.1 | 13.8 | 29.7 | 17.1 | 12.6 | 2.1 | 0.7 | 0.2 |
| 2003 ^b | 969 | 63.6 | 100 | 48.3 | 7.2 | 11.9 | 29.6 | 20.3 | 9.3 | 2.1 | 0.7 | 0.2 |

(Continued)

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B5—Number, average age, and percentage distribution, by sex and age, selected years 1940–2003—Continued

| Year | Number (thousands) | Average age | Percentage distribution by age ^a | | | | | | | | | |
|-------------------|-----------------------|----------------|---|------|------|------|-------|-------------------|---------------------------|-------|-------|----------------|
| | | | Total, all ages | 62 | 63 | 64 | 65 | | | 66–69 | 70–74 | 75 or older |
| | | | | | | | Total | Newly entitled | Disability conversions | | | |
| Women | | | | | | | | | | | | |
| 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 ^b | 809 | 65.4 | 100.0 | 48.2 | 5.5 | 7.5 | 19.5 | 10.5 | 8.9 | 4.4 | 6.4 | 8.5 |
| 1998 ^b | 733 | 64.0 | 100.0 | 53.1 | 7.0 | 8.9 | 22.0 | 12.4 | 9.6 | 4.1 | 2.4 | 2.5 |
| 1999 ^b | 737 | 63.6 | 100.0 | 55.1 | 6.8 | 9.2 | 22.6 | 12.5 | 10.1 | 3.8 | 1.8 | 0.7 |
| 2000 ^b | 854 | 63.8 | 100.0 | 52.2 | 5.9 | 9.3 | 23.6 | 13.9 | 9.7 | 6.5 | 2.2 | 0.4 |
| 2001 ^b | 795 | 63.7 | 100.0 | 51.3 | 7.1 | 11.5 | 23.7 | 12.8 | 10.9 | 3.1 | 2.6 | 0.6 |
| 2002 ^b | 811 | 63.6 | 100.0 | 52.9 | 6.6 | 12.2 | 23.9 | 12.7 | 11.2 | 2.3 | 1.8 | 0.3 |
| 2003 ^b | 822 | 63.6 | 100 | 53.5 | 6.7 | 10.6 | 23.8 | 15.1 | 8.7 | 2.7 | 2.2 | 0.5 |

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1985–2001 are based on a 1 percent sample. All other years are 100 percent data.

NOTE: ... = not applicable.

- a. Age in year of award for 1940–1980. Age in month of award for 1985–2003.
- b. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C1—Number and percentage distribution, by monthly benefit and sex, 2003

| Monthly benefit (dollars) | Total | | Men | | Women | |
|---------------------------|---------|---------|----------|---------|---------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| All disabled workers | 777,461 | 100.0 | 421,598 | 100.0 | 355,863 | 100.0 |
| Less than 100.00 | 6,305 | 0.8 | 3,480 | 0.8 | 2,825 | 0.8 |
| 100.00–149.90 | 3,254 | 0.4 | 1,224 | 0.3 | 2,030 | 0.6 |
| 150.00–199.90 | 7,441 | 1.0 | 2,744 | 0.7 | 4,697 | 1.3 |
| 200.00–249.90 | 11,418 | 1.5 | 4,254 | 1.0 | 7,164 | 2.0 |
| 250.00–299.90 | 13,664 | 1.8 | 4,965 | 1.2 | 8,699 | 2.4 |
| 300.00–349.90 | 15,094 | 1.9 | 5,538 | 1.3 | 9,556 | 2.7 |
| 350.00–399.90 | 15,648 | 2.0 | 5,694 | 1.4 | 9,954 | 2.8 |
| 400.00–449.90 | 16,200 | 2.1 | 5,904 | 1.4 | 10,296 | 2.9 |
| 450.00–499.90 | 17,814 | 2.3 | 6,504 | 1.5 | 11,310 | 3.2 |
| 500.00–549.90 | 23,270 | 3.0 | 8,444 | 2.0 | 14,826 | 4.2 |
| 550.00–599.90 | 42,120 | 5.4 | 14,903 | 3.5 | 27,217 | 7.7 |
| 600.00–649.90 | 42,825 | 5.5 | 15,953 | 3.8 | 26,872 | 7.6 |
| 650.00–699.90 | 41,931 | 5.4 | 16,575 | 3.9 | 25,356 | 7.1 |
| 700.00–749.90 | 40,058 | 5.2 | 16,905 | 4.0 | 23,153 | 6.5 |
| 750.00–799.90 | 38,009 | 4.9 | 16,994 | 4.0 | 21,015 | 5.9 |
| 800.00–849.90 | 36,366 | 4.7 | 17,091 | 4.1 | 19,275 | 5.4 |
| 850.00–899.90 | 34,140 | 4.4 | 16,843 | 4.0 | 17,297 | 4.9 |
| 900.00–949.90 | 32,069 | 4.1 | 16,652 | 4.0 | 15,417 | 4.3 |
| 950.00–999.90 | 29,903 | 3.9 | 16,443 | 3.9 | 13,460 | 3.8 |
| 1,000.00–1,049.90 | 27,967 | 3.6 | 15,992 | 3.8 | 11,975 | 3.4 |
| 1,050.00–1,099.90 | 25,740 | 3.3 | 15,265 | 3.6 | 10,475 | 2.9 |
| 1,100.00–1,149.90 | 24,180 | 3.1 | 15,177 | 3.6 | 9,003 | 2.5 |
| 1,150.00–1,199.90 | 22,349 | 2.9 | 14,692 | 3.5 | 7,657 | 2.2 |
| 1,200.00–1,249.90 | 20,655 | 2.7 | 13,933 | 3.3 | 6,722 | 1.9 |
| 1,250.00–1,299.90 | 19,094 | 2.5 | 13,376 | 3.2 | 5,718 | 1.6 |
| 1,300.00–1,349.90 | 17,684 | 2.3 | 12,670 | 3.0 | 5,014 | 1.4 |
| 1,350.00–1,399.90 | 16,243 | 2.1 | 11,926 | 2.8 | 4,317 | 1.2 |
| 1,400.00–1,449.90 | 15,139 | 2.0 | 11,353 | 2.7 | 3,786 | 1.1 |
| 1,450.00–1,499.90 | 14,966 | 1.9 | 11,529 | 2.7 | 3,437 | 1.0 |
| 1,500.00 or more | 105,914 | 13.6 | 88,574 | 21.0 | 17,340 | 4.9 |
| Average benefit (dollars) | 936.40 | | 1,062.30 | | 787.30 | |

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

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

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C2—Number, average age, and percentage distribution, by sex and age, selected years 1957–2003

| Year | Number | Average age | Percentage distribution, by age ^a | | | | | | | | | |
|------------|---------|-------------|--|----------|-------|-------|-------|-------|-------|-------|-------|-----------------|
| | | | Total, all ages | Under 30 | 30–39 | 40–44 | 45–49 | 50–54 | 55–59 | 60–61 | 62–64 | 65 ^b |
| <i>Men</i> | | | | | | | | | | | | |
| 1957 | 148,376 | 59.2 | 100.0 | ... | ... | ... | ... | 17.1 | 28.0 | 17.0 | 33.8 | 4.1 |
| 1958 | 107,003 | 59.0 | 100.0 | ... | ... | ... | ... | 19.7 | 27.5 | 15.2 | 28.9 | 8.7 |
| 1959 | 146,547 | 58.9 | 100.0 | ... | ... | ... | ... | 21.1 | 27.4 | 14.8 | 28.8 | 7.8 |
| 1960 | 168,466 | 54.5 | 100.0 | 0.8 | 7.0 | 6.5 | 10.5 | 16.7 | 20.0 | 11.8 | 21.3 | 5.4 |
| 1965 | 186,808 | 53.0 | 100.0 | 1.8 | 8.2 | 7.9 | 11.1 | 17.1 | 25.7 | 14.0 | 13.0 | 1.0 |
| 1970 | 258,072 | 52.1 | 100.0 | 6.7 | 7.6 | 6.5 | 10.1 | 14.7 | 23.5 | 12.3 | 16.1 | 2.6 |
| 1975 | 408,531 | 51.5 | 100.0 | 7.7 | 8.6 | 6.2 | 9.5 | 15.7 | 23.1 | 12.1 | 14.6 | 2.5 |
| 1980 | 275,185 | 51.2 | 100.0 | 8.3 | 9.7 | 6.0 | 8.4 | 14.7 | 24.6 | 12.3 | 14.2 | 1.8 |
| 1981 | 244,984 | 50.8 | 100.0 | 8.6 | 10.2 | 6.2 | 8.4 | 14.5 | 24.3 | 13.0 | 13.1 | 1.7 |
| 1982 | 207,453 | 50.9 | 100.0 | 8.4 | 10.4 | 6.3 | 8.4 | 14.1 | 24.6 | 12.9 | 13.6 | 1.2 |
| 1983 | 217,422 | 50.2 | 100.0 | 9.5 | 11.7 | 6.6 | 8.4 | 13.6 | 23.4 | 12.2 | 13.3 | 1.3 |
| 1984 | 247,833 | 50.0 | 100.0 | 9.2 | 12.8 | 7.1 | 8.7 | 13.4 | 22.6 | 12.2 | 12.7 | 1.3 |
| 1985 | 274,400 | 50.1 | 100.0 | 8.7 | 13.3 | 7.0 | 9.9 | 14.6 | 23.1 | 12.4 | 10.6 | 0.3 |
| 1986 | 273,700 | 48.7 | 100.0 | 10.7 | 15.3 | 8.1 | 9.4 | 14.3 | 21.3 | 11.1 | 9.5 | 0.3 |
| 1987 | 265,900 | 49.0 | 100.0 | 9.4 | 16.0 | 8.6 | 9.3 | 13.9 | 20.8 | 10.9 | 11.0 | 0.2 |
| 1988 | 265,700 | 49.2 | 100.0 | 8.4 | 16.0 | 9.7 | 9.0 | 14.6 | 21.3 | 10.5 | 10.2 | 0.2 |
| 1989 | 268,600 | 49.0 | 100.0 | 8.7 | 16.0 | 9.5 | 10.2 | 14.2 | 20.6 | 9.7 | 10.8 | 0.3 |
| 1990 | 293,300 | 48.1 | 100.0 | 10.9 | 16.9 | 9.4 | 9.5 | 13.5 | 20.5 | 10.3 | 8.8 | 0.1 |
| 1991 | 322,700 | 47.9 | 100.0 | 9.5 | 17.7 | 10.6 | 11.0 | 14.1 | 18.4 | 9.4 | 9.1 | 0.2 |
| 1992 | 395,600 | 47.8 | 100.0 | 9.5 | 18.5 | 10.8 | 11.0 | 13.0 | 18.6 | 9.8 | 8.7 | 0.2 |
| 1993 | 391,800 | 47.7 | 100.0 | 9.2 | 18.9 | 10.1 | 11.7 | 14.7 | 18.8 | 8.6 | 7.8 | 0.2 |
| 1994 | 379,300 | 48.4 | 100.0 | 6.8 | 18.4 | 10.8 | 12.7 | 15.4 | 19.3 | 9.0 | 7.6 | 0.1 |
| 1995 | 368,400 | 48.9 | 100.0 | 7.2 | 16.3 | 10.7 | 11.5 | 15.7 | 20.4 | 8.9 | 9.1 | 0.2 |
| 1996 | 347,100 | 48.7 | 100.0 | 6.9 | 16.2 | 10.8 | 13.2 | 16.2 | 19.9 | 9.3 | 7.5 | 0.1 |
| 1997 | 311,100 | 49.3 | 100.0 | 6.3 | 14.6 | 10.8 | 13.5 | 16.1 | 21.6 | 8.8 | 8.2 | 0.1 |
| 1998 | 331,400 | 49.2 | 100.0 | 6.3 | 14.3 | 11.1 | 12.4 | 18.3 | 21.6 | 8.1 | 7.8 | 0.2 |
| 1999 | 338,900 | 49.6 | 100.0 | 6.2 | 13.1 | 11.4 | 12.4 | 18.3 | 21.7 | 8.8 | 8.0 | 0.3 |
| 2000 | 329,800 | 49.6 | 100.0 | 6.8 | 12.9 | 10.7 | 12.7 | 17.7 | 21.0 | 9.1 | 8.8 | 0.2 |
| 2001 | 364,500 | 49.4 | 100.0 | 7.5 | 13.2 | 9.9 | 12.2 | 17.4 | 22.6 | 9.2 | 7.9 | 0.1 |
| 2002 | 406,336 | 49.4 | 100.0 | 7.8 | 12.0 | 10.3 | 12.7 | 17.5 | 22.5 | 9.2 | 7.9 | 0.1 |
| 2003 | 421,598 | 49.7 | 100.0 | 7.0 | 11.8 | 10.2 | 12.8 | 17.6 | 22.8 | 9.6 | 7.9 | 0.3 |

(Continued)

6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C2—Number, average age, and percentage distribution, by sex and age, selected years 1957–2003—Continued

| Year | Number | Average age | Percentage distribution, by age ^a | | | | | | | | | |
|--------------|---------|-------------|--|----------|-------|-------|-------|-------|-------|-------|-------|-----------------|
| | | | Total, all ages | Under 30 | 30–39 | 40–44 | 45–49 | 50–54 | 55–59 | 60–61 | 62–64 | 65 ^b |
| Women | | | | | | | | | | | | |
| 1957 | 30,426 | 57.4 | 100.0 | ... | ... | ... | ... | 25.5 | 38.9 | 19.8 | 15.3 | 0.5 |
| 1958 | 24,379 | 57.2 | 100.0 | ... | ... | ... | ... | 28.6 | 37.2 | 17.8 | 15.2 | 1.2 |
| 1959 | 31,264 | 57.0 | 100.0 | ... | ... | ... | ... | 30.2 | 36.9 | 17.6 | 14.2 | 1.1 |
| 1960 | 39,339 | 52.5 | 100.0 | 0.7 | 8.1 | 8.0 | 13.3 | 21.9 | 24.6 | 12.4 | 10.1 | 0.8 |
| 1965 | 66,691 | 53.2 | 100.0 | 1.1 | 6.5 | 7.4 | 11.7 | 19.3 | 28.3 | 14.1 | 10.9 | 0.6 |
| 1970 | 92,312 | 52.8 | 100.0 | 4.2 | 6.3 | 6.1 | 11.0 | 17.5 | 27.2 | 13.0 | 12.9 | 1.7 |
| 1975 | 183,518 | 52.1 | 100.0 | 6.1 | 7.3 | 6.1 | 10.1 | 17.7 | 25.5 | 12.2 | 12.9 | 2.1 |
| 1980 | 121,374 | 51.1 | 100.0 | 7.4 | 9.7 | 6.4 | 9.3 | 16.3 | 25.5 | 11.7 | 12.2 | 1.5 |
| 1981 | 106,863 | 50.8 | 100.0 | 7.8 | 10.2 | 6.5 | 9.5 | 16.4 | 25.1 | 12.0 | 11.1 | 1.4 |
| 1982 | 89,678 | 50.5 | 100.0 | 8.0 | 10.9 | 6.8 | 9.5 | 15.6 | 24.9 | 11.7 | 11.4 | 1.1 |
| 1983 | 94,127 | 49.8 | 100.0 | 9.0 | 12.2 | 7.4 | 9.5 | 14.8 | 23.5 | 10.9 | 11.6 | 1.1 |
| 1984 | 114,165 | 49.7 | 100.0 | 8.3 | 13.2 | 7.9 | 9.7 | 14.9 | 22.8 | 10.9 | 11.7 | 1.2 |
| 1985 | 134,500 | 49.7 | 100.0 | 8.6 | 12.9 | 8.0 | 10.6 | 15.8 | 23.3 | 10.1 | 10.5 | 0.1 |
| 1986 | 135,700 | 48.8 | 100.0 | 9.0 | 15.5 | 10.4 | 10.5 | 14.8 | 21.3 | 9.6 | 8.6 | 0.2 |
| 1987 | 143,700 | 49.5 | 100.0 | 7.5 | 15.2 | 8.1 | 11.2 | 15.8 | 23.4 | 9.6 | 8.8 | 0.3 |
| 1988 | 147,000 | 49.3 | 100.0 | 8.5 | 14.0 | 8.8 | 10.9 | 16.1 | 23.5 | 10.5 | 7.4 | 0.3 |
| 1989 | 146,900 | 49.1 | 100.0 | 7.8 | 14.8 | 10.4 | 11.9 | 13.8 | 21.2 | 10.8 | 8.9 | 0.3 |
| 1990 | 168,500 | 48.4 | 100.0 | 8.5 | 16.3 | 9.8 | 13.1 | 14.2 | 22.3 | 8.9 | 6.5 | 0.4 |
| 1991 | 190,400 | 48.4 | 100.0 | 8.5 | 16.8 | 10.1 | 12.2 | 16.2 | 19.5 | 8.9 | 7.4 | 0.4 |
| 1992 | 241,300 | 47.7 | 100.0 | 8.6 | 17.7 | 12.0 | 12.4 | 15.6 | 17.6 | 8.4 | 7.5 | 0.2 |
| 1993 | 237,900 | 48.1 | 100.0 | 7.5 | 17.5 | 11.2 | 13.1 | 16.5 | 19.7 | 6.8 | 7.4 | 0.2 |
| 1994 | 234,000 | 48.2 | 100.0 | 7.4 | 16.9 | 11.1 | 12.9 | 17.0 | 20.8 | 7.3 | 6.4 | 0.2 |
| 1995 | 263,200 | 48.5 | 100.0 | 6.4 | 16.7 | 11.4 | 13.8 | 17.2 | 20.5 | 7.6 | 6.3 | 0.1 |
| 1996 | 256,900 | 49.1 | 100.0 | 5.3 | 15.1 | 11.3 | 14.0 | 19.0 | 21.2 | 8.3 | 5.8 | 0.1 |
| 1997 | 250,200 | 48.4 | 100.0 | 6.2 | 16.3 | 12.2 | 14.1 | 19.0 | 19.0 | 6.8 | 6.2 | 0.2 |
| 1998 | 271,900 | 48.9 | 100.0 | 5.4 | 14.9 | 12.2 | 14.5 | 19.1 | 20.4 | 7.6 | 5.7 | 0.2 |
| 1999 | 266,900 | 48.7 | 100.0 | 5.7 | 14.6 | 12.5 | 15.3 | 18.2 | 20.6 | 6.6 | 6.2 | 0.3 |
| 2000 | 282,400 | 49.2 | 100.0 | 5.8 | 13.7 | 12.3 | 13.5 | 18.7 | 21.6 | 8.1 | 6.1 | 0.2 |
| 2001 | 304,800 | 48.4 | 100.0 | 7.9 | 14.0 | 12.1 | 13.8 | 18.5 | 20.1 | 7.6 | 5.9 | 0.1 |
| 2002 | 343,667 | 48.7 | 100.0 | 7.3 | 13.4 | 11.6 | 14.3 | 18.4 | 21.0 | 7.7 | 6.3 | 0.1 |
| 2003 | 355,863 | 49.0 | 100.0 | 6.8 | 13.2 | 11.4 | 14.2 | 18.4 | 21.5 | 8.0 | 6.3 | 0.2 |

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1985–2001 are based on a 1 percent sample. All other years are 100 percent data.

NOTE: ... = not applicable.

a. Age in year of award for 1957–1984. Age in month of award for 1985–2003.

b. Includes awards processed after attainment of age 65.

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C7—Number of applications, awards, ratio of awards to applications, and awards per 1,000 insured workers, selected years, 1960–2003

| Year | Number (thousands) | | Awards as a percentage of applications | Awards per 1,000 insured workers |
|------|--------------------|--------|--|----------------------------------|
| | Applications | Awards | | |
| 1960 | 418.6 | 207.8 | 49.6 | 4.5 |
| 1965 | 529.3 | 253.5 | 47.9 | 4.7 |
| 1966 | 544.5 | 278.3 | 51.1 | 5.1 |
| 1967 | 573.2 | 301.4 | 52.6 | 5.4 |
| 1968 | 719.8 | 323.2 | 44.9 | 5.7 |
| 1969 | 725.2 | 344.7 | 47.5 | 4.9 |
| 1970 | 869.8 | 350.4 | 40.3 | 4.8 |
| 1971 | 923.9 | 415.9 | 45.0 | 5.6 |
| 1972 | 947.5 | 455.4 | 48.1 | 6.0 |
| 1973 | 1,067.5 | 491.6 | 46.1 | 6.3 |
| 1974 | 1,330.2 | 536.0 | 40.3 | 6.7 |
| 1975 | 1,285.3 | 592.0 | 46.1 | 7.1 |
| 1976 | 1,232.2 | 551.5 | 44.8 | 6.5 |
| 1977 | 1,235.2 | 568.9 | 46.1 | 6.5 |
| 1978 | 1,184.7 | 464.4 | 39.2 | 5.2 |
| 1979 | 1,187.8 | 416.7 | 35.1 | 4.4 |
| 1980 | 1,262.3 | 396.6 | 31.4 | 4.0 |
| 1981 | 1,161.2 | 351.8 | 30.3 | 3.4 |
| 1982 | 1,019.8 | 297.1 | 29.1 | 2.9 |
| 1983 | 1,019.3 | 311.5 | 30.6 | 3.0 |
| 1984 | 1,036.7 | 362.0 | 34.9 | 3.4 |
| 1985 | 1,066.2 | 377.4 | 35.4 | 3.5 |
| 1986 | 1,118.4 | 416.9 | 37.3 | 3.8 |
| 1987 | 1,108.9 | 415.8 | 37.5 | 3.7 |
| 1988 | 1,017.9 | 409.5 | 40.2 | 3.6 |
| 1989 | 984.9 | 425.6 | 43.2 | 3.7 |
| 1990 | 1,067.7 | 468.0 | 43.8 | 4.0 |
| 1991 | 1,208.7 | 536.4 | 44.4 | 4.5 |
| 1992 | 1,335.1 | 636.6 | 47.7 | 5.2 |
| 1993 | 1,425.8 | 635.2 | 44.6 | 5.2 |
| 1994 | 1,443.8 | 631.9 | 43.8 | 5.1 |
| 1995 | 1,338.1 | 645.6 | 48.3 | 5.1 |
| 1996 | 1,279.2 | 624.3 | 48.8 | 4.9 |
| 1997 | 1,180.2 | 587.7 | 49.8 | 4.5 |
| 1998 | 1,169.3 | 608.4 | 52.0 | 4.6 |
| 1999 | 1,200.1 | 620.6 | 51.7 | 4.6 |
| 2000 | 1,330.6 | 621.3 | 46.7 | 4.5 |
| 2001 | 1,498.6 | 690.5 | 46.1 | 5.0 |
| 2002 | 1,682.5 | 750.0 | 44.6 | 5.3 |
| 2003 | 1,895.5 | 777.5 | 41.0 | 5.5 |

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 1950–2003

| Year | Total | Wives with entitlement based on— | | Husbands |
|--|---------|----------------------------------|---------|----------|
| | | Care of children | Age | |
| <i>Wives and husbands of retired workers</i> | | | | |
| 1950 | 162,768 | 9,646 | 152,310 | 812 |
| 1955 | 288,915 | 21,692 | 263,816 | 3,407 |
| 1960 | 339,987 | 32,254 | 305,713 | 2,020 |
| 1965 | 321,015 | 44,087 | 275,717 | 1,211 |
| 1970 | 339,447 | 51,378 | 286,867 | 1,202 |
| 1975 | 350,558 | 60,184 | 289,600 | 774 |
| 1980 | 360,693 | 55,401 | 294,892 | 10,400 |
| 1981 | 338,540 | 50,993 | 277,641 | 9,906 |
| 1982 | 349,967 | 36,229 | 302,739 | 10,999 |
| 1983 | 356,274 | 35,309 | 308,922 | 12,043 |
| 1984 | 342,691 | 30,972 | 298,855 | 12,864 |
| 1985 | 356,558 | 30,454 | 312,849 | 13,255 |
| 1986 | 358,115 | 28,925 | 315,427 | 13,763 |
| 1987 | 333,333 | 26,099 | 294,499 | 12,735 |
| 1988 | 316,929 | 23,045 | 281,760 | 12,124 |
| 1989 | 310,498 | 21,285 | 278,655 | 10,558 |
| 1990 | 308,980 | 21,395 | 277,238 | 10,347 |
| 1991 | 307,000 | 21,154 | 276,236 | 9,610 |
| 1992 | 304,764 | 21,057 | 274,670 | 9,037 |
| 1993 | 290,728 | 19,945 | 262,240 | 8,543 |
| 1994 | 275,025 | 18,431 | 248,430 | 8,164 |
| 1995 | 258,740 | 17,214 | 233,731 | 7,795 |
| 1996 | 244,014 | 15,466 | 221,059 | 7,489 |
| 1997 | 268,012 | 14,040 | 246,229 | 7,743 |
| 1998 | 263,668 | 13,472 | 242,390 | 7,806 |
| 1999 | 275,568 | 13,521 | 253,559 | 8,488 |
| 2000 | 341,503 | 15,625 | 315,148 | 10,730 |
| 2001 | 314,547 | 13,743 | 289,757 | 11,047 |
| 2002 | 317,685 | 14,011 | 291,377 | 12,297 |
| 2003 | 305,831 | 12,832 | 280,883 | 12,116 |

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D1—Number of wives and husbands, by type of benefit, selected years 1950–2003—Continued

| Year | Total | Wives with entitlement based on— | | Husbands |
|---|---------|----------------------------------|--------|----------|
| | | Care of children | Age | |
| <i>Wives and husbands of disabled workers</i> | | | | |
| 1958 ^a | 12,920 | 7,869 | 5,035 | 16 |
| 1959 ^b | 54,299 | 32,844 | 21,301 | 154 |
| 1960 | 54,187 | 38,326 | 15,756 | 105 |
| 1965 | 69,183 | 55,230 | 13,813 | 140 |
| 1970 | 96,304 | 74,913 | 21,227 | 164 |
| 1975 | 148,741 | 116,624 | 31,942 | 175 |
| 1980 | 108,500 | 74,922 | 32,616 | 962 |
| 1981 | 95,575 | 64,333 | 30,360 | 882 |
| 1982 | 77,835 | 45,463 | 31,540 | 832 |
| 1983 | 80,079 | 43,820 | 35,369 | 890 |
| 1984 | 81,834 | 46,433 | 34,470 | 931 |
| 1985 | 83,511 | 48,522 | 34,101 | 888 |
| 1986 | 82,435 | 47,711 | 33,797 | 927 |
| 1987 | 77,316 | 43,881 | 31,652 | 1,783 |
| 1988 | 73,790 | 41,627 | 29,634 | 2,529 |
| 1989 | 69,113 | 39,212 | 27,750 | 2,151 |
| 1990 | 69,667 | 40,458 | 27,023 | 2,186 |
| 1991 | 72,754 | 43,543 | 26,747 | 2,464 |
| 1992 | 78,083 | 47,841 | 27,502 | 2,740 |
| 1993 | 74,605 | 45,602 | 26,276 | 2,727 |
| 1994 | 69,549 | 42,824 | 24,240 | 2,485 |
| 1995 | 63,097 | 37,972 | 22,833 | 2,292 |
| 1996 | 57,528 | 33,638 | 21,775 | 2,115 |
| 1997 | 50,818 | 25,779 | 23,329 | 1,710 |
| 1998 | 47,550 | 23,190 | 22,693 | 1,667 |
| 1999 | 46,164 | 21,949 | 22,557 | 1,658 |
| 2000 | 43,941 | 19,801 | 22,399 | 1,741 |
| 2001 | 43,412 | 19,535 | 21,979 | 1,898 |
| 2002 | 45,600 | 20,621 | 22,863 | 2,116 |
| 2003 | 47,183 | 20,580 | 24,269 | 2,334 |

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

NOTE: Benefits not necessarily payable at time of award.

a. January–November.

b. Includes December 1958.

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 basis of entitlement, age in month of award, and sex, 2003

| Basis of entitlement and age | Wives | | | | | | Husbands | |
|---------------------------------------|---------|--|--------------------|--|---------------------|--|----------|--|
| | Total | | Of retired workers | | Of disabled workers | | | |
| | Number | Average monthly benefit ^a (dollars) | Number | Average monthly benefit ^a (dollars) | Number | Average monthly benefit ^a (dollars) | Number | Average monthly benefit ^a (dollars) |
| All wives and husbands | 338,564 | 341.40 | 293,715 | 356.60 | 44,849 | 241.60 | 14,450 | 232.30 |
| By age | | | | | | | | |
| Entitlement based on care of children | 33,412 | 255.20 | 12,832 | 380.00 | 20,580 | 177.40 | 1,220 | 136.20 |
| Under 35 | 6,313 | 142.60 | 523 | 325.70 | 5,790 | 126.10 | 219 | 95.50 |
| 35–39 | 5,177 | 189.10 | 946 | 333.70 | 4,231 | 156.70 | 226 | 114.80 |
| 40–44 | 6,125 | 237.00 | 1,691 | 361.40 | 4,434 | 189.50 | 282 | 130.50 |
| 45–49 | 5,680 | 287.40 | 2,367 | 387.60 | 3,313 | 215.80 | 210 | 144.00 |
| 50–54 | 4,158 | 324.50 | 2,364 | 389.40 | 1,794 | 239.00 | 151 | 177.80 |
| 55–59 | 3,190 | 371.70 | 2,448 | 403.80 | 742 | 266.00 | 79 | 175.50 |
| 60–61 | 1,236 | 423.50 | 1,086 | 440.40 | 150 | 301.00 | 31 | 212.60 |
| 62–64 | 1,533 | 329.10 | 1,407 | 336.60 | 126 | 245.10 | 22 | 226.70 |
| Entitlement based on age | 305,152 | 350.80 | 280,883 | 355.50 | 24,269 | 296.00 | 13,230 | 241.10 |
| 62–64 | 227,111 | 344.70 | 206,104 | 350.40 | 21,007 | 288.50 | 3,422 | 217.80 |
| 62 | 145,343 | 336.60 | 128,218 | 343.80 | 17,125 | 282.30 | 1,276 | 189.80 |
| 63 | 36,897 | 334.10 | 34,773 | 336.10 | 2,124 | 301.00 | 785 | 209.60 |
| 64 | 44,871 | 379.60 | 43,113 | 381.40 | 1,758 | 333.70 | 1,361 | 248.90 |
| 65–69 | 65,628 | 375.80 | 62,908 | 377.10 | 2,720 | 345.30 | 6,168 | 260.10 |
| 65 | 40,077 | 396.20 | 38,649 | 397.90 | 1,428 | 349.50 | 2,435 | 287.80 |
| 66 | 10,600 | 353.50 | 10,090 | 354.20 | 510 | 340.10 | 1,116 | 256.00 |
| 67 | 6,544 | 339.10 | 6,219 | 338.80 | 325 | 344.60 | 973 | 237.60 |
| 68 | 4,884 | 335.50 | 4,592 | 335.20 | 292 | 339.10 | 881 | 232.30 |
| 69 | 3,523 | 334.50 | 3,358 | 334.30 | 165 | 338.10 | 763 | 238.30 |
| 70–74 | 9,295 | 322.50 | 8,896 | 322.70 | 399 | 316.70 | 2,397 | 221.00 |
| 75 or older | 3,895 | 333.50 | 3,769 | 334.00 | 126 | 320.30 | 1,342 | 230.30 |
| By sex | | | | | | | | |
| Wives | | | | | | | | |
| Not divorced | 305,882 | 344.30 | 263,735 | 361.10 | 42,147 | 239.70 | ... | ... |
| Divorced | 32,682 | 313.70 | 29,980 | 317.50 | 2,702 | 271.10 | ... | ... |
| Husbands of— | | | | | | | | |
| Retired workers | ... | ... | ... | ... | ... | ... | 12,116 | 245.20 |
| Disabled workers | ... | ... | ... | ... | ... | ... | 2,334 | 165.40 |

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

NOTE: ... = not applicable.

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

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2003

| Year | All children | Children of— | | |
|------|--------------|-----------------|------------------|------------------|
| | | Retired workers | Deceased workers | Disabled workers |
| | | <i>Total</i> | | |
| 1957 | 313,163 | 81,842 | 231,321 | ... |
| 1960 | 415,719 | 69,979 | 241,430 | 104,310 |
| 1965 | 783,202 | 134,187 | 451,399 | 197,616 |
| 1970 | 1,090,865 | 182,595 | 591,724 | 316,546 |
| 1975 | 1,331,913 | 225,579 | 591,118 | 515,216 |
| 1976 | 1,327,197 | 236,805 | 578,905 | 511,487 |
| 1977 | 1,365,513 | 259,447 | 587,589 | 518,477 |
| 1978 | 1,234,658 | 214,284 | 566,992 | 453,382 |
| 1979 | 1,191,521 | 247,800 | 544,549 | 399,172 |
| 1980 | 1,174,112 | 248,658 | 540,246 | 385,208 |
| 1981 | 1,086,547 | 211,406 | 535,487 | 339,654 |
| 1982 | 916,715 | 182,849 | 473,396 | 260,470 |
| 1983 | 752,839 | 144,945 | 380,992 | 226,895 |
| 1984 | 721,564 | 131,986 | 351,326 | 238,252 |
| 1985 | 713,632 | 128,076 | 332,531 | 253,025 |
| 1986 | 700,627 | 122,652 | 319,800 | 258,167 |
| 1987 | 685,299 | 117,984 | 310,573 | 256,742 |
| 1988 | 706,031 | 116,659 | 324,346 | 265,026 |
| 1989 | 675,362 | 106,491 | 307,484 | 261,387 |
| 1990 | 695,307 | 108,105 | 303,616 | 283,586 |
| 1991 | 726,908 | 107,261 | 301,459 | 318,188 |
| 1992 | 794,571 | 108,686 | 304,300 | 381,585 |
| 1993 | 816,454 | 106,566 | 311,290 | 398,598 |
| 1994 | 824,239 | 102,983 | 310,051 | 411,205 |
| 1995 | 808,578 | 101,239 | 306,044 | 401,295 |
| 1996 | 798,485 | 98,655 | 302,480 | 397,350 |
| 1997 | 757,346 | 97,594 | 297,204 | 362,548 |
| 1998 | 763,170 | 96,893 | 294,851 | 371,426 |
| 1999 | 773,166 | 99,826 | 295,196 | 378,144 |
| 2000 | 776,676 | 115,358 | 297,686 | 363,632 |
| 2001 | 796,174 | 110,680 | 302,445 | 383,049 |
| 2002 | 846,361 | 116,186 | 310,395 | 419,780 |
| 2003 | 852,354 | 111,992 | 305,409 | 434,953 |

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2003—Continued

| Year | All children | Children of— | | |
|------------------------------|--------------|-----------------|------------------|------------------|
| | | Retired workers | Deceased workers | Disabled workers |
| <i>Children under age 18</i> | | | | |
| 1940 | 59,382 | 8,249 | 51,133 | ... |
| 1945 | 127,514 | 7,215 | 120,299 | ... |
| 1950 | 122,641 | 25,495 | 97,146 | ... |
| 1955 | 238,795 | 40,402 | 198,393 | ... |
| 1960 | 391,366 | 57,239 | 231,611 | 102,516 |
| 1965 | 523,453 | 84,707 | 263,637 | 175,109 |
| 1970 | 678,940 | 99,353 | 337,960 | 241,627 |
| 1975 | 806,770 | 115,347 | 300,139 | 391,284 |
| 1980 | 573,828 | 111,610 | 227,139 | 235,079 |
| 1981 | 512,939 | 84,793 | 228,317 | 199,829 |
| 1982 | 457,445 | 81,502 | 222,738 | 153,205 |
| 1983 | 444,467 | 80,117 | 211,396 | 152,954 |
| 1984 | 449,242 | 74,328 | 202,163 | 172,721 |
| 1985 | 464,908 | 74,128 | 200,576 | 190,204 |
| 1986 | 465,115 | 70,915 | 196,008 | 198,192 |
| 1987 | 451,370 | 66,672 | 184,668 | 195,030 |
| 1988 | 452,519 | 63,586 | 192,278 | 196,655 |
| 1989 | 446,308 | 59,073 | 189,285 | 197,950 |
| 1990 | 468,439 | 60,588 | 189,792 | 218,059 |
| 1991 | 502,442 | 60,618 | 191,537 | 250,287 |
| 1992 | 559,725 | 61,034 | 192,689 | 306,002 |
| 1993 | 575,247 | 59,515 | 198,469 | 317,263 |
| 1994 | 586,342 | 57,677 | 201,598 | 327,067 |
| 1995 | 571,650 | 57,215 | 198,848 | 315,587 |
| 1996 | 561,687 | 56,126 | 194,333 | 311,228 |
| 1997 | 517,118 | 54,841 | 184,237 | 278,040 |
| 1998 | 516,100 | 54,218 | 182,118 | 279,764 |
| 1999 | 522,946 | 57,019 | 182,159 | 283,768 |
| 2000 | 525,390 | 68,440 | 184,762 | 272,188 |
| 2001 | 542,147 | 64,207 | 188,300 | 289,640 |
| 2002 | 578,906 | 66,992 | 192,226 | 319,688 |
| 2003 | 580,166 | 63,793 | 187,060 | 329,313 |

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2003—Continued

| Year | All children | Children of— | | |
|--------------------------------|--------------|-----------------|------------------|------------------|
| | | Retired workers | Deceased workers | Disabled workers |
| <i>Disabled adult children</i> | | | | |
| 1957 | 29,507 | 17,249 | 12,258 | ... |
| 1960 | 24,353 | 12,740 | 9,819 | 1,794 |
| 1965 | 21,398 | 10,017 | 8,668 | 2,713 |
| 1970 | 24,547 | 11,348 | 9,425 | 3,774 |
| 1975 | 32,707 | 14,636 | 11,182 | 6,889 |
| 1976 | 34,517 | 15,602 | 11,546 | 7,369 |
| 1977 | 36,210 | ^a | ^a | 7,885 |
| 1978 | 33,611 | 15,378 | 11,013 | 7,220 |
| 1979 | 33,419 | 15,967 | 10,999 | 6,453 |
| 1980 | 33,470 | 16,650 | 10,626 | 6,194 |
| 1981 | 30,545 | 15,365 | 9,745 | 5,435 |
| 1982 | 28,707 | 14,772 | 9,685 | 4,250 |
| 1983 | 33,639 | 17,309 | 11,223 | 5,107 |
| 1984 | 36,427 | 18,330 | 12,556 | 5,541 |
| 1985 | 39,083 | 19,661 | 12,709 | 6,713 |
| 1986 | 40,525 | 20,295 | 13,244 | 6,986 |
| 1987 | 39,665 | 20,761 | 12,117 | 6,787 |
| 1988 | 38,702 | 20,544 | 11,512 | 6,646 |
| 1989 | 37,001 | 19,668 | 10,975 | 6,358 |
| 1990 | 38,772 | 20,862 | 11,277 | 6,633 |
| 1991 | 41,086 | 21,850 | 11,684 | 7,552 |
| 1992 | 47,009 | 23,615 | 13,846 | 9,548 |
| 1993 | 47,246 | 23,173 | 13,819 | 10,254 |
| 1994 | 44,483 | 22,119 | 12,590 | 9,774 |
| 1995 | 43,275 | 21,566 | 11,930 | 9,779 |
| 1996 | 40,583 | 20,169 | 11,061 | 9,353 |
| 1997 | 38,701 | 19,611 | 10,616 | 8,474 |
| 1998 | 39,941 | 19,932 | 10,914 | 9,095 |
| 1999 | 41,748 | 20,467 | 11,430 | 9,851 |
| 2000 | 43,845 | 22,567 | 11,621 | 9,657 |
| 2001 | 43,042 | 21,307 | 11,872 | 9,863 |
| 2002 | 46,636 | 22,881 | 12,685 | 11,070 |
| 2003 | 47,235 | 22,024 | 12,920 | 12,291 |

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2003—Continued

| Year | All children | Children of— | | |
|-----------------|--------------|-----------------|------------------|------------------|
| | | Retired workers | Deceased workers | Disabled workers |
| <i>Students</i> | | | | |
| 1965 | 238,351 | 39,463 | 179,094 | 19,794 |
| 1970 | 387,378 | 71,894 | 244,339 | 71,145 |
| 1975 | 492,436 | 95,596 | 279,797 | 117,043 |
| 1976 | 544,739 | 108,197 | 295,058 | 141,484 |
| 1977 | 574,760 | ^a | ^a | 148,227 |
| 1978 | 544,396 | 105,719 | 291,434 | 147,243 |
| 1979 | 553,889 | 117,118 | 292,766 | 144,005 |
| 1980 | 566,814 | 120,398 | 302,481 | 143,935 |
| 1981 | 543,063 | 111,248 | 297,425 | 134,390 |
| 1982 | 430,563 | 86,575 | 240,973 | 103,015 |
| 1983 | 274,726 | 47,519 | 158,373 | 68,834 |
| 1984 | 235,895 | 39,328 | 136,577 | 59,990 |
| 1985 | 209,641 | 34,287 | 119,246 | 56,108 |
| 1986 | 194,987 | 31,442 | 110,556 | 52,989 |
| 1987 | 194,264 | 30,551 | 108,788 | 54,925 |
| 1988 | 214,810 | 32,529 | 120,556 | 61,725 |
| 1989 | 192,053 | 27,750 | 107,224 | 57,079 |
| 1990 | 188,096 | 26,655 | 102,547 | 58,894 |
| 1991 | 183,380 | 24,793 | 98,238 | 60,349 |
| 1992 | 187,837 | 24,037 | 97,765 | 66,035 |
| 1993 | 193,961 | 23,878 | 99,002 | 71,081 |
| 1994 | 193,414 | 23,187 | 95,863 | 74,364 |
| 1995 | 193,653 | 22,458 | 95,266 | 75,929 |
| 1996 | 196,215 | 22,360 | 97,086 | 76,769 |
| 1997 | 201,527 | 23,142 | 102,351 | 76,034 |
| 1998 | 207,129 | 22,743 | 101,819 | 82,567 |
| 1999 | 208,472 | 22,340 | 101,607 | 84,525 |
| 2000 | 207,441 | 24,351 | 101,303 | 81,787 |
| 2001 | 210,985 | 25,166 | 102,273 | 83,546 |
| 2002 | 220,819 | 26,313 | 105,484 | 89,022 |
| 2003 | 224,953 | 26,175 | 105,429 | 93,349 |

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

NOTE: . . . = not applicable.

a. Data not available.

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 in month of award, 2003

| Age | Total number | Children of— | | | | | | |
|--------------------------------|--------------|-----------------|--|------------------|--|------------------|--|--|
| | | Retired workers | | Deceased workers | | Disabled workers | | |
| | | Number | Average monthly benefit ^a (dollars) | Number | Average monthly benefit ^a (dollars) | Number | Average monthly benefit ^a (dollars) | |
| All children | | | | | | | | |
| Total | 852,354 | 111,992 | 429.20 | 305,409 | 624.30 | 434,953 | 245.60 | |
| Children under age 18 | | | | | | | | |
| Subtotal | 580,166 | 63,793 | 417.20 | 187,060 | 599.90 | 329,313 | 217.40 | |
| Under 1 | 20,694 | 993 | 369.10 | 4,374 | 545.60 | 15,327 | 182.60 | |
| 1 | 14,930 | 728 | 381.80 | 4,740 | 539.00 | 9,462 | 167.70 | |
| 2 | 16,256 | 800 | 392.90 | 5,375 | 539.30 | 10,081 | 169.00 | |
| 3 | 18,109 | 1,043 | 370.90 | 6,012 | 550.70 | 11,054 | 172.60 | |
| 4 | 19,575 | 1,223 | 366.60 | 6,567 | 559.90 | 11,785 | 175.80 | |
| 5 | 21,732 | 1,489 | 360.10 | 7,258 | 560.40 | 12,985 | 177.60 | |
| 6 | 22,966 | 1,654 | 378.00 | 7,563 | 577.90 | 13,749 | 183.30 | |
| 7 | 24,870 | 2,041 | 377.50 | 8,391 | 576.50 | 14,438 | 191.60 | |
| 8 | 27,365 | 2,344 | 384.60 | 9,267 | 579.20 | 15,754 | 194.30 | |
| 9 | 30,273 | 2,851 | 385.40 | 10,039 | 584.20 | 17,383 | 198.40 | |
| 10 | 33,014 | 3,299 | 389.60 | 11,095 | 582.90 | 18,620 | 203.70 | |
| 11 | 36,936 | 4,091 | 385.70 | 12,368 | 586.70 | 20,477 | 206.70 | |
| 12 | 40,157 | 4,759 | 397.60 | 13,416 | 596.00 | 21,982 | 217.20 | |
| 13 | 43,648 | 5,548 | 400.70 | 14,278 | 610.40 | 23,822 | 225.00 | |
| 14 | 45,960 | 6,323 | 419.40 | 15,387 | 616.40 | 24,250 | 233.70 | |
| 15 | 47,959 | 7,243 | 429.20 | 15,879 | 638.00 | 24,837 | 249.60 | |
| 16 | 50,046 | 8,136 | 466.00 | 16,424 | 654.30 | 25,486 | 278.40 | |
| 17 | 65,676 | 9,228 | 472.50 | 18,627 | 648.80 | 37,821 | 272.60 | |
| Disabled adult children | | | | | | | | |
| Subtotal | 47,235 | 22,024 | 386.00 | 12,920 | 568.00 | 12,291 | 286.60 | |
| Under 20 | 7,390 | 1,086 | 401.50 | 2,787 | 543.50 | 3,517 | 254.20 | |
| 20–24 | 10,096 | 2,436 | 403.50 | 3,518 | 565.90 | 4,142 | 271.50 | |
| 25–29 | 6,539 | 2,892 | 411.70 | 1,715 | 612.60 | 1,932 | 307.70 | |
| 30–34 | 7,578 | 4,610 | 410.10 | 1,502 | 604.00 | 1,466 | 346.30 | |
| 35–39 | 7,652 | 5,434 | 400.90 | 1,295 | 587.30 | 923 | 337.00 | |
| 40 or older | 7,980 | 5,566 | 327.50 | 2,103 | 529.90 | 311 | 290.90 | |
| Students aged 18–19 | | | | | | | | |
| Subtotal | 224,953 | 26,175 | 494.60 | 105,429 | 674.40 | 93,349 | 339.80 | |
| 18 | 213,336 | 25,506 | 498.50 | 103,892 | 676.30 | 83,938 | 347.80 | |
| 19 | 11,617 | 669 | 343.30 | 1,537 | 549.60 | 9,411 | 268.20 | |

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

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

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D6—Number of mothers and fathers, by type of benefit, 1950–2003

| Year | Total | Mothers | Fathers | Widowed | | | Surviving divorced mothers and fathers |
|-------------------|---------|---------|---------|----------|---|---|--|
| | | | | Subtotal | With at least 1 child under age 16 ^a | Entitled solely because of at least 1 disabled child ^b | |
| 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 ^c | 81,467 | 81,467 | ... | 81,392 | 80,130 | 1,262 | 75 |
| 1959 ^d | 102,020 | 102,020 | ... | 101,933 | 100,234 | 1,699 | 87 |
| 1960 | 92,607 | 92,607 | ... | 92,507 | 90,939 | 1,568 | 100 |
| 1961 | 98,449 | 98,449 | ... | 98,374 | 96,778 | 1,596 | 75 |
| 1962 | 99,925 | 99,925 | ... | 99,835 | 98,099 | 1,736 | 90 |
| 1963 | 104,960 | 104,960 | ... | 104,866 | 102,828 | 2,038 | 94 |
| 1964 | 106,249 | 106,249 | ... | 106,137 | 103,778 | 2,359 | 112 |
| 1965 | 100,005 | 100,005 | ... | 99,804 | 97,972 | 1,832 | 201 |
| 1966 | 107,135 | 107,135 | ... | 106,677 | 105,270 | 1,407 | 458 |
| 1967 | 110,762 | 110,762 | ... | 110,283 | 108,842 | 1,441 | 479 |
| 1968 | 113,765 | 113,765 | ... | 113,323 | 111,869 | 1,454 | 442 |
| 1969 | 116,922 | 116,922 | ... | 116,434 | 115,035 | 1,399 | 488 |
| 1970 | 112,377 | 112,377 | ... | 111,887 | 110,459 | 1,428 | 490 |
| 1971 | 116,548 | 116,548 | ... | 115,996 | 114,266 | 1,730 | 552 |
| 1972 | 117,699 | 117,699 | ... | 117,034 | 113,822 | 3,212 | 665 |
| 1973 | 118,775 | 118,775 | ... | 112,511 | 109,574 | 2,937 | 6,264 |
| 1974 | 109,221 | 109,221 | ... | 102,584 | 99,705 | 2,879 | 6,637 |
| 1975 | 116,224 | 111,372 | 4,852 | 108,002 | 103,597 | 4,405 | 8,222 |
| 1976 | 113,520 | 107,339 | 6,181 | 105,158 | 99,781 | 5,377 | 8,362 |
| 1977 | 118,821 | 111,473 | 7,348 | 109,050 | 103,492 | 5,558 | 9,771 |
| 1978 | 110,015 | 103,391 | 6,624 | 100,247 | 96,834 | 3,413 | 9,768 |
| 1979 | 110,424 | 103,805 | 6,619 | 99,413 | 96,249 | 3,164 | 11,011 |
| 1980 | 107,809 | 99,922 | 7,887 | 96,005 | 92,768 | 3,237 | 11,804 |
| 1981 | 99,653 | 92,138 | 7,515 | 81,079 | 78,069 | 3,010 | 11,059 |
| 1982 | 86,786 | 80,198 | 6,588 | 70,019 | 67,301 | 2,718 | 10,179 |
| 1983 | 82,464 | 76,271 | 6,193 | 66,711 | 63,304 | 3,407 | 9,560 |
| 1984 | 73,794 | 68,164 | 5,630 | 59,256 | 54,962 | 4,294 | 8,908 |
| 1985 | 72,241 | 66,992 | 5,249 | 62,881 | 58,507 | 4,374 | 9,360 |
| 1986 | 69,340 | 64,147 | 5,193 | 60,200 | 55,639 | 4,561 | 9,140 |
| 1987 | 64,777 | 59,626 | 5,151 | 56,329 | 52,051 | 4,278 | 8,448 |
| 1988 | 62,676 | 57,859 | 4,817 | 54,833 | 50,655 | 4,178 | 7,843 |
| 1989 | 59,525 | 54,916 | 4,609 | 51,992 | 48,226 | 3,766 | 7,533 |
| 1990 | 58,060 | 53,346 | 4,714 | 50,879 | 47,673 | 3,206 | 7,181 |
| 1991 | 57,896 | 52,889 | 5,007 | 50,787 | 47,695 | 3,092 | 7,109 |
| 1992 | 56,402 | 51,273 | 5,129 | 49,341 | 46,302 | 3,039 | 7,061 |
| 1993 | 56,408 | 51,358 | 5,050 | 49,465 | 46,420 | 3,045 | 6,943 |
| 1994 | 54,732 | 49,825 | 4,907 | 48,217 | 45,346 | 2,871 | 6,515 |

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D6—Number of mothers and fathers, by type of benefit, 1950–2003—Continued

| Year | Total | Mothers | Fathers | Widowed | | | Surviving divorced mothers and fathers |
|------|--------|---------|---------|----------|---|---|--|
| | | | | Subtotal | With at least 1 child under age 16 ^a | Entitled solely because of at least 1 disabled child ^b | |
| 1995 | 51,645 | 46,874 | 4,771 | 45,368 | 42,817 | 2,551 | 6,277 |
| 1996 | 49,150 | 44,732 | 4,418 | 43,538 | 41,192 | 2,346 | 5,612 |
| 1997 | 43,504 | 39,805 | 3,699 | 38,565 | 36,396 | 2,169 | 4,939 |
| 1998 | 42,395 | 38,533 | 3,862 | 37,739 | 35,577 | 2,162 | 4,656 |
| 1999 | 41,756 | 37,926 | 3,830 | 37,271 | 35,092 | 2,179 | 4,485 |
| 2000 | 40,491 | 36,521 | 3,970 | 36,197 | 34,241 | 1,956 | 4,294 |
| 2001 | 41,323 | 37,106 | 4,217 | 36,728 | 34,753 | 1,975 | 4,595 |
| 2002 | 40,829 | 36,534 | 4,295 | 36,186 | 34,264 | 1,922 | 4,643 |
| 2003 | 39,206 | 34,712 | 4,494 | 34,797 | 32,979 | 1,818 | 4,409 |

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

NOTE: . . . = not applicable.

- a. Prior to August 1981, benefits were payable to mothers and fathers caring for a child under age 18. For mothers and fathers caring for a child who was at least age 14 and who were entitled in August 1981, benefits were continued until the child attained age 18 or September 1983, whichever came earlier.
- b. Excludes mothers and fathers who had both disabled and nondisabled entitled children in their care.
- c. January–November.
- d. Includes December 1958.

CONTACT: 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 in month of award and sex, 2003

| Age, sex, and type of benefit | Nondisabled | | | | Disabled widow(er)s | | Widowed mothers and fathers | |
|-----------------------------------|-------------|--|----------|--|---------------------|--|-----------------------------|--|
| | Widows | | Widowers | | Number | Average monthly benefit ^a (dollars) | Number | Average monthly benefit ^a (dollars) |
| | Number | Average monthly benefit ^a (dollars) | Number | Average monthly benefit ^a (dollars) | | | | |
| All widow(er)s | 451,583 | 779.00 | 28,209 | 491.40 | 28,514 | 577.90 | 39,206 | 672.00 |
| By age | | | | | | | | |
| Under 25 | ... | ... | ... | ... | ... | ... | 1,336 | 519.20 |
| 25–29 | ... | ... | ... | ... | ... | ... | 2,829 | 569.90 |
| 30–34 | ... | ... | ... | ... | ... | ... | 4,971 | 589.90 |
| 35–39 | ... | ... | ... | ... | ... | ... | 7,486 | 636.90 |
| 40–44 | ... | ... | ... | ... | ... | ... | 8,987 | 703.80 |
| 45–49 | ... | ... | ... | ... | ... | ... | 7,283 | 732.40 |
| 50–54 | ... | ... | ... | ... | 10,555 | 575.00 | 3,755 | 757.20 |
| 55–59 | ... | ... | ... | ... | 15,320 | 584.10 | 1,633 | 732.00 |
| 60–64 | 155,096 | 877.30 | 12,861 | 672.30 | 2,455 | 560.10 | 753 | 715.20 |
| 60 | 71,157 | 887.10 | 5,162 | 664.10 | 1,502 | 565.70 | 235 | 745.90 |
| 61 | 23,393 | 902.00 | 3,604 | 653.10 | 401 | 563.10 | 165 | 740.20 |
| 62 | 22,095 | 864.30 | 2,039 | 700.90 | 282 | 549.60 | 145 | 656.60 |
| 63 | 15,426 | 815.70 | 763 | 683.70 | 162 | 573.20 | 87 | 683.00 |
| 64 | 23,025 | 875.90 | 1,293 | 706.90 | 108 | 478.40 | 121 | 715.10 |
| 65–69 | 86,565 | 702.90 | 4,159 | 442.50 | ^b 151 | 447.10 | ^b 74 | 559.10 |
| 65 | 40,589 | 754.40 | 1,808 | 567.60 | ... | ... | ... | ... |
| 66 | 11,485 | 663.20 | 621 | 377.60 | ... | ... | ... | ... |
| 67 | 11,264 | 649.40 | 585 | 348.00 | ... | ... | ... | ... |
| 68 | 11,738 | 661.10 | 576 | 320.70 | ... | ... | ... | ... |
| 69 | 11,489 | 656.10 | 569 | 336.60 | ... | ... | ... | ... |
| 70–74 | 63,199 | 681.70 | 2,929 | 296.70 | ... | ... | ... | ... |
| 70 | 11,892 | 663.90 | 518 | 306.50 | ... | ... | ... | ... |
| 71 | 12,354 | 674.30 | 611 | 295.80 | ... | ... | ... | ... |
| 72 | 12,843 | 679.80 | 598 | 291.30 | ... | ... | ... | ... |
| 73 | 13,058 | 692.00 | 593 | 299.90 | ... | ... | ... | ... |
| 74 | 13,052 | 696.50 | 609 | 291.50 | ... | ... | ... | ... |
| 75–79 | 65,961 | 707.40 | 3,039 | 289.20 | ... | ... | ... | ... |
| 75 | 13,274 | 692.80 | 565 | 289.60 | ... | ... | ... | ... |
| 76 | 13,564 | 705.90 | 588 | 274.80 | ... | ... | ... | ... |
| 77 | 13,171 | 703.40 | 578 | 283.80 | ... | ... | ... | ... |
| 78 | 13,022 | 716.70 | 603 | 300.30 | ... | ... | ... | ... |
| 79 | 12,930 | 718.80 | 705 | 295.90 | ... | ... | ... | ... |
| 80 or older | 79,986 | 805.30 | 5,173 | 307.40 | ... | ... | ... | ... |
| By sex | | | | | | | | |
| Men | ... | ... | ... | ... | 1,384 | 426.10 | 4,494 | 554.20 |
| Women | ... | ... | ... | ... | 27,130 | 585.60 | 34,712 | 687.30 |
| Widow or mother | 398,404 | 779.70 | ... | ... | 23,068 | 584.80 | 30,675 | 688.80 |
| Surviving divorced wife or mother | 53,179 | 773.90 | ... | ... | 4,062 | 590.40 | 4,037 | 675.90 |

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

NOTE: ... = not applicable.

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

b. Aged 65 or older.

CONTACT: Jennie H. Park (410) 965-9358 or Joseph Bondar (410) 965-0162.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D8—Number of widow(er)s, by type of benefit, 1950–2003

| 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 ^a | 199,320 | 198,948 | 372 | ... | ... |
| 1959 ^b | 252,683 | 252,100 | 583 | ... | ... |
| 1960 | 239,267 | 238,813 | 454 | ... | ... |
| 1961 | 251,275 | 250,606 | 669 | ... | ... |
| 1962 | 267,051 | 266,465 | 586 | ... | ... |
| 1963 | 278,709 | 278,138 | 571 | ... | ... |
| 1964 | 283,263 | 282,689 | 574 | ... | ... |
| 1965 | 359,431 | 358,875 | 556 | ... | ... |
| 1966 | 403,595 | 403,035 | 560 | ... | ... |
| 1967 | 355,589 | 355,032 | 557 | ... | ... |
| 1968 | 375,391 | 352,280 | 604 | 22,438 | 69 |
| 1969 | 375,753 | 353,928 | 625 | 21,127 | 73 |
| 1970 | 363,216 | 347,031 | 576 | 15,546 | 63 |
| 1971 | 381,262 | 363,689 | 551 | 16,960 | 62 |
| 1972 | 402,809 | 382,452 | 544 | 19,739 | 74 |
| 1973 | 372,167 | 351,793 | 651 | 19,660 | 63 |
| 1974 | 363,693 | 343,317 | 550 | 19,793 | 33 |
| 1975 | 377,246 | 353,249 | 476 | 23,476 | 45 |
| 1976 | 385,373 | 362,229 | 489 | 22,603 | 52 |
| 1977 | 416,735 | 383,057 | 10,416 | 22,981 | 281 |
| 1978 | 403,679 | 375,750 | 9,022 | 18,553 | 354 |
| 1979 | 445,555 | 418,883 | 9,272 | 17,136 | 264 |
| 1980 | 452,156 | 424,690 | 11,412 | 15,789 | 265 |
| 1981 | 480,772 | 453,307 | 13,311 | 13,868 | 286 |
| 1982 | 492,451 | 465,070 | 14,941 | 12,222 | 218 |
| 1983 | 501,688 | 470,764 | 16,512 | 14,144 | 268 |
| 1984 | 499,677 | 464,979 | 17,533 | 16,847 | 318 |
| 1985 | 501,673 | 467,197 | 17,390 | 16,759 | 327 |
| 1986 | 491,052 | 454,903 | 17,731 | 18,033 | 385 |
| 1987 | 475,035 | 440,803 | 17,836 | 16,062 | 334 |
| 1988 | 457,574 | 424,107 | 18,139 | 14,979 | 349 |
| 1989 | 449,139 | 416,154 | 17,817 | 14,830 | 338 |
| 1990 | 451,862 | 417,925 | 18,513 | 15,058 | 366 |
| 1991 | 468,788 | 420,190 | 19,008 | 28,951 | 639 |
| 1992 | 472,078 | 419,413 | 19,430 | 32,477 | 758 |
| 1993 | 466,198 | 414,941 | 19,422 | 31,036 | 799 |
| 1994 | 459,340 | 410,323 | 19,114 | 29,075 | 828 |
| 1995 | 444,899 | 396,725 | 18,577 | 28,762 | 835 |
| 1996 | 438,081 | 390,962 | 18,508 | 27,783 | 828 |
| 1997 | 440,076 | 393,014 | 18,516 | 27,691 | 855 |
| 1998 | 443,669 | 395,231 | 19,039 | 28,494 | 905 |
| 1999 | 469,806 | 419,205 | 20,951 | 28,654 | 996 |
| 2000 | 505,021 | 453,334 | 23,645 | 26,997 | 1,045 |
| 2001 | 495,848 | 443,267 | 24,309 | 27,179 | 1,093 |
| 2002 | 522,537 | 465,627 | 27,306 | 28,211 | 1,393 |
| 2003 | 508,306 | 451,583 | 28,209 | 27,130 | 1,384 |

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

NOTE: ... = not applicable.

a. January–November.

b. Includes December 1958.

CONTACT: Joseph Bondar (410) 965-0162 or Diane Wallace (410) 965-0165.

6.D OASDI Benefits Awarded: Dependents and Survivors

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 ^a | 656,825 | 683,964 | 202.52 |
| 1959 ^b | 822,413 | 855,032 | 212.67 |
| 1960 | 778,660 | 809,194 | 211.55 |
| 1961 | 813,464 | 843,308 | 210.46 |
| 1962 | 865,217 | 892,261 | 212.02 |
| 1963 | 968,651 | 1,015,536 | 212.61 |
| 1964 | 1,011,414 | 1,073,044 | 213.94 |
| 1965 | 989,848 | 1,046,874 | 226.01 |
| 1966 | 1,060,335 | 1,138,317 | 224.00 |
| 1967 | 1,133,787 | 1,217,980 | 222.51 |
| 1968 | 1,158,666 | 1,216,910 | 236.30 |
| 1969 | 1,253,467 | 1,295,897 | 232.60 |
| 1970 | 1,220,248 | 1,257,687 | 243.90 |
| 1971 | 1,251,831 | 1,283,924 | 244.20 |
| 1972 | 1,290,133 | 1,320,637 | 247.90 |
| 1973 | 1,299,223 | 1,325,833 | 253.10 |
| 1974 | 1,285,221 | 1,307,890 | 254.64 |
| 1975 | 1,334,914 | 1,344,095 | 252.47 |
| 1976 | 1,321,516 | 1,328,008 | 251.60 |
| 1977 | 1,227,390 | 1,240,304 | 254.17 |
| 1978 | 1,437,275 | 1,451,140 | 254.65 |
| 1979 | 1,500,944 | 1,515,614 | 254.68 |
| 1980 | 1,552,617 | 1,566,330 | 254.70 |
| 1981 | 1,305,261 | 1,321,565 | 254.72 |
| 1982 | 797,096 | 808,041 | 255.00 |
| 1983 | 805,524 | 807,537 | 255.00 |
| 1984 | 825,494 | 831,761 | 255.00 |
| 1985 | 823,053 | 825,395 | 255.00 |
| 1986 | 809,487 | 811,946 | 255.00 |
| 1987 | 810,066 | 812,814 | 255.00 |
| 1988 | 839,802 | 842,037 | 255.00 |
| 1989 | 829,682 | 831,825 | 255.00 |

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D9—Number and average amount of lump-sum death payment awards, 1940–2001—*Continued*

| Year | Number of— | | Average lump sum per worker (dollars) |
|------|----------------------|----------------------|---------------------------------------|
| | Deceased workers | Lump-sum payments | |
| 1990 | 830,799 | 832,900 | 255.00 |
| 1991 | 847,838 | 850,100 | 255.00 |
| 1992 | 855,073 | 857,614 | 255.00 |
| 1993 | 860,861 | 863,492 | 255.00 |
| 1994 | 852,289 | 855,278 | 255.00 |
| 1995 | ^c 835,360 | ^c 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 |

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

- a. January–November.
- b. Includes December 1958.
- c. Revised 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 2003

| Sex and monthly benefit (dollars) | Total | | Without reduction for early retirement | | With reduction for early retirement | |
|-----------------------------------|---------|---------|--|---------|-------------------------------------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| All retired workers | 106,010 | 100.0 | 29,800 | 100.0 | 76,210 | 100.0 |
| Less than 350.00 | 19,080 | 18.0 | 7,730 | 25.9 | 11,350 | 14.9 |
| 350.00–399.90 | 3,700 | 3.5 | 1,450 | 4.9 | 2,250 | 3.0 |
| 400.00–449.90 | 4,060 | 3.8 | 1,120 | 3.8 | 2,940 | 3.9 |
| 450.00–499.90 | 4,930 | 4.7 | 1,550 | 5.2 | 3,380 | 4.4 |
| 500.00–549.90 | 5,620 | 5.3 | 1,770 | 5.9 | 3,850 | 5.1 |
| 550.00–599.90 | 5,670 | 5.3 | 1,740 | 5.8 | 3,930 | 5.2 |
| 600.00–649.90 | 5,040 | 4.8 | 1,340 | 4.5 | 3,700 | 4.9 |
| 650.00–699.90 | 4,750 | 4.5 | 1,260 | 4.2 | 3,490 | 4.6 |
| 700.00–749.90 | 4,470 | 4.2 | 1,200 | 4.0 | 3,270 | 4.3 |
| 750.00–799.90 | 4,470 | 4.2 | 1,260 | 4.2 | 3,210 | 4.2 |
| 800.00–849.90 | 3,780 | 3.6 | 920 | 3.1 | 2,860 | 3.8 |
| 850.00–899.90 | 3,890 | 3.7 | 970 | 3.3 | 2,920 | 3.8 |
| 900.00–949.90 | 3,340 | 3.2 | 800 | 2.7 | 2,540 | 3.3 |
| 950.00–999.90 | 3,330 | 3.1 | 810 | 2.7 | 2,520 | 3.3 |
| 1,000.00–1,049.90 | 3,300 | 3.1 | 590 | 2.0 | 2,710 | 3.6 |
| 1,050.00–1,099.90 | 3,090 | 2.9 | 640 | 2.1 | 2,450 | 3.2 |
| 1,100.00–1,149.90 | 2,250 | 2.1 | 490 | 1.6 | 1,760 | 2.3 |
| 1,150.00–1,199.90 | 2,540 | 2.4 | 410 | 1.4 | 2,130 | 2.8 |
| 1,200.00–1,249.90 | 3,170 | 3.0 | 330 | 1.1 | 2,840 | 3.7 |
| 1,250.00–1,299.90 | 2,910 | 2.7 | 350 | 1.2 | 2,560 | 3.4 |
| 1,300.00 or more | 12,620 | 11.9 | 3,070 | 10.3 | 9,550 | 12.5 |
| Men | 66,380 | 100.0 | 20,830 | 100.0 | 45,550 | 100.0 |
| Less than 350.00 | 10,290 | 15.5 | 4,400 | 21.1 | 5,890 | 12.9 |
| 350.00–399.90 | 2,530 | 3.8 | 1,150 | 5.5 | 1,380 | 3.0 |
| 400.00–449.90 | 2,730 | 4.1 | 890 | 4.3 | 1,840 | 4.0 |
| 450.00–499.90 | 3,060 | 4.6 | 1,250 | 6.0 | 1,810 | 4.0 |
| 500.00–549.90 | 2,910 | 4.4 | 1,300 | 6.2 | 1,610 | 3.5 |
| 550.00–599.90 | 2,820 | 4.2 | 1,290 | 6.2 | 1,530 | 3.4 |
| 600.00–649.90 | 2,280 | 3.4 | 900 | 4.3 | 1,380 | 3.0 |
| 650.00–699.90 | 2,390 | 3.6 | 930 | 4.5 | 1,460 | 3.2 |
| 700.00–749.90 | 2,330 | 3.5 | 910 | 4.4 | 1,420 | 3.1 |
| 750.00–799.90 | 2,430 | 3.7 | 880 | 4.2 | 1,550 | 3.4 |
| 800.00–849.90 | 2,150 | 3.2 | 660 | 3.2 | 1,490 | 3.3 |
| 850.00–899.90 | 2,310 | 3.5 | 660 | 3.2 | 1,650 | 3.6 |
| 900.00–949.90 | 2,090 | 3.1 | 550 | 2.6 | 1,540 | 3.4 |
| 950.00–999.90 | 2,280 | 3.4 | 540 | 2.6 | 1,740 | 3.8 |
| 1,000.00–1,049.90 | 2,190 | 3.3 | 430 | 2.1 | 1,760 | 3.9 |
| 1,050.00–1,099.90 | 2,130 | 3.2 | 400 | 1.9 | 1,730 | 3.8 |
| 1,100.00–1,149.90 | 1,700 | 2.6 | 380 | 1.8 | 1,320 | 2.9 |
| 1,150.00–1,199.90 | 1,960 | 3.0 | 330 | 1.6 | 1,630 | 3.6 |
| 1,200.00–1,249.90 | 2,610 | 3.9 | 250 | 1.2 | 2,360 | 5.2 |
| 1,250.00–1,299.90 | 2,280 | 3.4 | 240 | 1.2 | 2,040 | 4.5 |
| 1,300.00 or more | 10,910 | 16.4 | 2,490 | 12.0 | 8,420 | 18.5 |

(Continued)

Table 6.E1—Number and percentage distribution of retired workers with benefits withheld, by monthly benefit, reduction for early retirement, and sex, December 2003—Continued

| Sex and monthly benefit (dollars) | Total | | Without reduction for early retirement | | With reduction for early retirement | |
|-----------------------------------|--------|---------|--|---------|-------------------------------------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| Women | 39,630 | 100.0 | 8,970 | 100.0 | 30,660 | 100.0 |
| Less than 350.00 | 8,790 | 22.2 | 3,330 | 37.1 | 5,460 | 17.8 |
| 350.00–399.90 | 1,170 | 3.0 | 300 | 3.3 | 870 | 2.8 |
| 400.00–449.90 | 1,330 | 3.4 | 230 | 2.6 | 1,100 | 3.6 |
| 450.00–499.90 | 1,870 | 4.7 | 300 | 3.3 | 1,570 | 5.1 |
| 500.00–549.90 | 2,710 | 6.8 | 470 | 5.2 | 2,240 | 7.3 |
| 550.00–599.90 | 2,850 | 7.2 | 450 | 5.0 | 2,400 | 7.8 |
| 600.00–649.90 | 2,760 | 7.0 | 440 | 4.9 | 2,320 | 7.6 |
| 650.00–699.90 | 2,360 | 6.0 | 330 | 3.7 | 2,030 | 6.6 |
| 700.00–749.90 | 2,140 | 5.4 | 290 | 3.2 | 1,850 | 6.0 |
| 750.00–799.90 | 2,040 | 5.1 | 380 | 4.2 | 1,660 | 5.4 |
| 800.00–849.90 | 1,630 | 4.1 | 260 | 2.9 | 1,370 | 4.5 |
| 850.00–899.90 | 1,580 | 4.0 | 310 | 3.5 | 1,270 | 4.1 |
| 900.00–949.90 | 1,250 | 3.2 | 250 | 2.8 | 1,000 | 3.3 |
| 950.00–999.90 | 1,050 | 2.7 | 270 | 3.0 | 780 | 2.5 |
| 1,000.00–1,049.90 | 1,110 | 2.8 | 160 | 1.8 | 950 | 3.1 |
| 1,050.00–1,099.90 | 960 | 2.4 | 240 | 2.7 | 720 | 2.3 |
| 1,100.00–1,149.90 | 550 | 1.4 | 110 | 1.2 | 440 | 1.4 |
| 1,150.00–1,199.90 | 580 | 1.5 | 80 | 0.9 | 500 | 1.6 |
| 1,200.00–1,249.90 | 560 | 1.4 | 80 | 0.9 | 480 | 1.6 |
| 1,250.00–1,299.90 | 630 | 1.6 | 110 | 1.2 | 520 | 1.7 |
| 1,300.00 or more | 1,710 | 4.3 | 580 | 6.5 | 1,130 | 3.7 |

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

CONTACT: Dana N. Mercer (410) 966-6637 or Robert L. Hackendorf (410) 965-5536.

6.E OASDI: Benefits Withheld

Table 6.E4—Number of beneficiaries with benefits withheld, by reason for withholding payment and type of benefit, December 2003

| Reason payment withheld | Total, all beneficiaries | Retired workers | | | Disabled workers | Wives and husbands | | | | Children | Widowed mothers and fathers | Widow-(er)s | Parents | Special age-72 beneficiaries |
|---|--------------------------|-----------------|--------|--------|------------------|--------------------|-------------------------------|----------------------------|----------|----------|-----------------------------|-------------|---------|------------------------------|
| | | Subtotal | Men | Women | | Subtotal | Wives | | Husbands | | | | | |
| | | | | | | | Without children ^a | With children ^b | | | | | | |
| Total | 1,732,436 | 107,295 | 66,812 | 40,483 | 102,527 | 294,871 | 167,993 | 57,024 | 69,854 | 484,390 | 60,504 | 672,969 | 573 | 9,307 |
| Earnings of— | | | | | | | | | | | | | | |
| Retired workers | 41,733 | 39,157 | 22,716 | 16,441 | ... | 1,590 | 1,366 | 159 | 65 | 986 | ... | ... | ... | ... |
| Other beneficiaries | 86,461 | ... | ... | ... | ... | 37,544 | 714 | 34,553 | 2,277 | 152 | 38,778 | 9,987 | ... | ... |
| Entitled child not in care of beneficiary | 27,178 | ... | ... | ... | ... | 13,028 | 68 | 11,840 | 1,120 | ... | 14,150 | ... | ... | ... |
| Payee not determined | 8,190 | 692 | 349 | 343 | 1,517 | 26 | c | c | c | 5,672 | c | 277 | c | c |
| Recoupment of overpayment for reasons other than earnings | 27,927 | 6,520 | 3,170 | 3,350 | 5,811 | 1,964 | 1,079 | 832 | 53 | 10,037 | 1,195 | 2,397 | c | c |
| Address unknown | 50,773 | 19,976 | 11,881 | 8,095 | 8,677 | 1,595 | 1,052 | 390 | 153 | 12,713 | 216 | 7,170 | 38 | 388 |
| Determination of continuing disability pending | 5,953 | ... | ... | ... | 3,893 | 141 | c | 132 | c | 1,912 | ... | 7 | ... | ... |
| Workers' compensation offset | 7,908 | ... | ... | ... | 1,851 | 516 | 50 | 438 | 28 | 5,541 | ... | ... | ... | ... |
| Government pension offset | 297,295 | ... | ... | ... | ... | 194,424 | 131,745 | c | 62,640 | ... | c | 99,362 | ... | 3,426 |
| Receipt of public assistance | 3,738 | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | 3,738 |
| Technical entitlement | 956,991 | ... | ... | ... | ... | 25,927 | 18,377 | 5,665 | 1,885 | 391,041 | 1,582 | 538,297 | c | c |
| Other reasons | 218,289 | 40,950 | 28,696 | 12,254 | 80,778 | 18,116 | 13,515 | 2,973 | 1,628 | 56,336 | 4,494 | 15,472 | 432 | 1,711 |

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

NOTE: ... = not applicable.

- a. Aged 62 or older.
- b. Under age 65 with entitled children in their care.
- c. Not shown to avoid disclosure of information regarding particular individuals.

CONTACT: Dana N. 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 2003

| 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 | 239,405 | 55,466 | 21,817 | 47,910 | 218,127 | 88,784 | 63,703 | 19,982 | 4,586 | 12,638 | 6,843 |
| Earnings of— | | | | | | | | | | | |
| Retired workers | 1,590 | ... | 835 | ... | ... | 113 | ... | ... | 38 | ... | ... |
| Other beneficiaries | 6,856 | 30,688 | 24 | 32 | 56 | 13 | 14 | ^a | ^a | 5 | 4 |
| Entitled child not in care of beneficiary | 2,030 | 10,998 | ... | ... | ... | ... | ... | ... | ... | ... | ... |
| Payee not determined | 22 | 4 | 215 | 2,683 | 1,864 | 127 | 680 | ^a | ^a | 14 | 8 |
| Recoupment of overpayment for reasons other than earnings | 1,171 | 793 | 406 | 2,330 | 6,604 | 109 | 274 | 120 | 16 | 76 | 102 |
| Address unknown | 1,202 | 393 | 578 | 2,989 | 6,536 | 327 | 1,565 | 281 | 45 | 243 | 149 |
| Determination of continuing disability pending | ... | 141 | ... | ... | 1,565 | 54 | 192 | 95 | ... | ... | 6 |
| Workers' compensation offset | ... | 516 | ... | ... | 5,329 | ... | ... | 98 | ... | ... | 114 |
| Government pension offset | 192,477 | 1,947 | ... | ... | ... | ... | ... | ... | ... | ... | ... |
| Technical entitlement | 18,573 | 7,354 | 16,460 | 29,594 | 169,277 | 85,521 | 52,254 | 15,504 | 4,404 | 11,953 | 6,074 |
| Other reasons | 15,484 | 2,632 | 3,299 | 10,282 | 26,896 | 2,520 | 8,724 | 3,804 | 78 | 347 | 386 |

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

NOTE: ... = not applicable.

a. Not shown to avoid disclosure of information regarding particular individuals.

CONTACT: Dana N. 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, 1940–2003

| Year | Total, all benefits | Retired workers | Disabled workers | Wives and husbands | Children | | | | Widowed mothers and fathers | Widow(er)s | Parents | Special age-72 beneficiaries |
|-----------|---------------------|-----------------|------------------|--------------------|------------|--------------|-------------------------|------------|-----------------------------|------------|---------|------------------------------|
| | | | | | Total | Under age 18 | Disabled adult children | Students | | | | |
| Total | 137,519,033 | 48,414,476 | 14,757,371 | 17,323,424 | 38,561,855 | 24,305,068 | 751,538 | 13,505,249 | 4,523,615 | 12,598,118 | 107,478 | 1,232,696 |
| 1940–1944 | 246,534 | 84,737 | ... | 40,811 | 73,394 | 73,394 | ... | ... | 40,868 | 5,680 | 1,044 | ... |
| 1945–1949 | 896,041 | 304,902 | ... | 154,261 | 250,835 | 250,835 | ... | ... | 145,998 | 36,144 | 3,901 | ... |
| 1950 | 266,615 | 98,280 | ... | 51,200 | 69,062 | 69,062 | ... | ... | 33,313 | 13,642 | 1,118 | ... |
| 1951 | 354,282 | 141,665 | ... | 73,706 | 82,516 | 82,516 | ... | ... | 37,016 | 17,999 | 1,380 | ... |
| 1952 | 383,780 | 160,284 | ... | 85,349 | 75,352 | 75,352 | ... | ... | 40,085 | 20,978 | 1,732 | ... |
| 1953 | 455,652 | 193,688 | ... | 99,409 | 89,292 | 89,292 | ... | ... | 44,331 | 27,006 | 1,926 | ... |
| 1954 | 501,694 | 212,894 | ... | 111,788 | 99,375 | 99,375 | ... | ... | 45,870 | 29,871 | 1,896 | ... |
| 1955 | 579,229 | 247,998 | ... | 125,880 | 117,443 | 117,443 | ... | ... | 49,330 | 36,488 | 2,090 | ... |
| 1956 | 624,981 | 269,006 | ... | 134,700 | 128,391 | 128,391 | ... | ... | 51,874 | 38,849 | 2,161 | ... |
| 1957 | 789,331 | 334,710 | 16,131 | 178,464 | 146,828 | 146,540 | 288 | ... | 54,715 | 56,022 | 2,461 | ... |
| 1958 | 817,512 | 322,279 | 52,949 | 173,608 | 156,944 | 156,348 | 596 | ... | 52,088 | 57,422 | 2,222 | ... |
| 1959 | 1,163,018 | 458,175 | 81,982 | 255,169 | 211,711 | 209,948 | 1,763 | ... | 67,346 | 85,401 | 3,234 | ... |
| 1960 | 1,170,612 | 440,555 | 89,090 | 249,792 | 235,965 | 233,512 | 2,453 | ... | 67,555 | 84,396 | 3,259 | ... |
| 1961 | 1,327,950 | 471,552 | 115,546 | 276,437 | 290,895 | 287,599 | 3,296 | ... | 77,778 | 92,322 | 3,420 | ... |
| 1962 | 1,410,718 | 507,807 | 128,299 | 282,569 | 311,045 | 307,200 | 3,845 | ... | 78,261 | 99,332 | 3,405 | ... |
| 1963 | 1,672,045 | 591,951 | 137,850 | 330,576 | 397,764 | 392,606 | 5,158 | ... | 92,246 | 117,743 | 3,915 | ... |
| 1964 | 1,739,693 | 616,124 | 138,576 | 333,969 | 424,680 | 418,834 | 5,846 | ... | 96,116 | 126,328 | 3,900 | ... |
| 1965 | 1,868,804 | 646,734 | 156,648 | 345,229 | 481,215 | 448,344 | 6,628 | 26,243 | 98,058 | 137,031 | 3,889 | ... |
| 1966 | 2,178,105 | 696,038 | 168,630 | 351,877 | 704,131 | 457,688 | 7,329 | 239,114 | 92,054 | 158,302 | 3,749 | 3,324 |
| 1967 | 2,545,076 | 748,184 | 208,899 | 373,803 | 820,610 | 503,110 | 9,178 | 308,322 | 102,004 | 172,411 | 3,789 | 115,376 |
| 1968 | 2,654,191 | 789,586 | 222,197 | 386,245 | 837,390 | 514,363 | 10,620 | 312,407 | 100,344 | 188,844 | 4,004 | 125,581 |
| 1969 | 2,860,287 | 827,151 | 251,269 | 399,689 | 946,481 | 564,725 | 11,922 | 369,834 | 107,119 | 205,188 | 3,525 | 119,865 |
| 1970 | 2,841,523 | 817,129 | 260,444 | 388,574 | 956,566 | 582,918 | 11,795 | 361,853 | 102,578 | 208,843 | 3,313 | 104,076 |
| 1971 | 2,944,134 | 846,103 | 266,471 | 394,422 | 1,011,381 | 607,138 | 11,621 | 392,622 | 104,577 | 223,988 | 3,162 | 94,030 |
| 1972 | 2,949,327 | 839,018 | 261,739 | 384,297 | 1,037,251 | 605,569 | 13,924 | 417,758 | 108,995 | 232,375 | 2,950 | 82,702 |
| 1973 | 3,132,957 | 873,593 | 304,792 | 396,828 | 1,137,641 | 637,851 | 12,445 | 487,345 | 103,056 | 234,039 | 2,955 | 80,053 |
| 1974 | 3,296,247 | 921,897 | 320,958 | 416,891 | 1,205,329 | 699,400 | 15,288 | 490,641 | 116,061 | 243,139 | 2,886 | 69,086 |
| 1975 | 3,313,151 | 931,953 | 329,532 | 421,973 | 1,209,574 | 695,082 | 15,195 | 499,297 | 110,493 | 249,274 | 2,574 | 57,778 |
| 1976 | 3,405,273 | 941,162 | 351,504 | 424,417 | 1,262,306 | 711,425 | 16,104 | 534,777 | 114,823 | 256,020 | 2,412 | 52,629 |
| 1977 | 3,551,125 | 955,114 | 401,334 | 430,431 | 1,331,923 | 740,822 | 17,060 | 574,041 | 114,605 | 265,721 | 2,285 | 49,712 |
| 1978 | 3,589,849 | 977,703 | 413,571 | 428,498 | 1,342,365 | 736,536 | 17,496 | 588,333 | 112,491 | 271,102 | 2,106 | 42,013 |
| 1979 | 3,568,400 | 953,520 | 422,503 | 426,014 | 1,346,176 | 726,910 | 18,598 | 600,668 | 111,604 | 272,422 | 1,831 | 34,330 |
| 1980 | 3,538,615 | 1,009,542 | 408,051 | 420,313 | 1,259,831 | 636,825 | 14,561 | 608,445 | 118,300 | 289,326 | 1,705 | 31,547 |
| 1981 | 3,596,613 | 1,006,756 | 434,187 | 419,331 | 1,305,554 | 664,436 | 15,482 | 625,636 | 111,025 | 291,081 | 1,649 | 27,030 |
| 1982 | 3,869,989 | 1,032,327 | 483,847 | 437,104 | 1,485,066 | 677,326 | 16,435 | 791,305 | 109,210 | 298,435 | 1,521 | 22,479 |
| 1983 | 3,788,835 | 1,068,963 | 453,621 | 492,524 | 1,223,789 | 584,312 | 19,706 | 619,771 | 214,361 | 309,168 | 1,448 | 24,961 |
| 1984 | 3,230,134 | 1,102,737 | 371,913 | 373,796 | 954,150 | 498,199 | 19,277 | 436,674 | 88,342 | 319,858 | 1,283 | 18,055 |
| 1985 | 3,109,569 | 1,150,236 | 339,984 | 367,257 | 820,641 | 446,106 | 17,022 | 357,513 | 84,165 | 331,090 | 1,228 | 14,968 |
| 1986 | 2,996,494 | 1,152,844 | 341,276 | 362,966 | 703,293 | 474,999 | 17,013 | 211,281 | 90,071 | 329,855 | 1,110 | 15,079 |
| 1987 | 2,967,965 | 1,163,655 | 347,948 | 354,240 | 681,275 | 457,523 | 17,056 | 206,696 | 80,131 | 328,008 | 1,041 | 11,667 |
| 1988 | 3,087,126 | 1,227,357 | 356,143 | 354,250 | 723,385 | 484,001 | 19,478 | 219,906 | 73,473 | 341,432 | 922 | 10,164 |
| 1989 | 2,977,413 | 1,202,430 | 351,402 | 339,550 | 678,094 | 454,048 | 19,726 | 204,320 | 66,527 | 332,040 | 856 | 6,514 |
| 1990 | 2,958,646 | 1,222,810 | 348,194 | 337,006 | 646,343 | 415,616 | 20,014 | 210,713 | 64,260 | 334,293 | 769 | 4,971 |
| 1991 | 2,943,272 | 1,237,517 | 351,303 | 332,892 | 619,977 | 401,092 | 17,723 | 201,162 | 61,383 | 335,740 | 646 | 3,814 |
| 1992 | 2,969,109 | 1,252,171 | 361,796 | 329,102 | 616,771 | 397,723 | 17,857 | 201,191 | 65,852 | 339,827 | 617 | 2,973 |
| 1993 | 3,075,227 | 1,313,867 | 372,317 | 336,335 | 632,585 | 408,497 | 18,842 | 205,246 | 62,436 | 354,833 | 578 | 2,276 |
| 1994 | 3,124,009 | 1,329,241 | 384,590 | 331,416 | 647,848 | 421,730 | 20,034 | 206,084 | 72,662 | 356,097 | 529 | 1,626 |
| 1995 | 3,161,744 | 1,334,027 | 399,475 | 327,233 | 678,821 | 451,375 | 22,639 | 204,807 | 61,813 | 358,691 | 493 | 1,191 |
| 1996 | 3,187,291 | 1,352,339 | 396,980 | 321,703 | 690,618 | 459,254 | 23,776 | 207,588 | 61,618 | 362,751 | 444 | 838 |
| 1997 | 3,413,296 | 1,370,596 | 464,984 | 319,172 | 777,803 | 537,259 | 26,210 | 214,334 | 60,342 | 419,105 | 376 | 918 |
| 1998 | 3,307,618 | 1,405,342 | 409,489 | 313,423 | 741,412 | 495,678 | 26,755 | 218,979 | 54,551 | 382,619 | 346 | 436 |
| 1999 | 3,366,363 | 1,436,865 | 433,950 | 312,867 | 748,950 | 490,634 | 29,444 | 228,872 | 51,341 | 381,791 | 361 | 238 |
| 2000 | 3,404,466 | 1,447,269 | 460,351 | 310,703 | 753,430 | 502,351 | 33,300 | 217,779 | 50,925 | 381,341 | 282 | 165 |
| 2001 | 3,440,679 | 1,460,763 | 459,073 | 304,413 | 775,873 | 515,300 | 32,988 | 227,585 | 49,838 | 390,315 | 289 | 115 |
| 2002 | 3,494,924 | 1,465,869 | 478,098 | 306,796 | 807,955 | 534,181 | 34,722 | 239,052 | 49,919 | 385,945 | 265 | 77 |
| 2003 | 3,411,500 | 1,447,461 | 447,485 | 292,156 | 796,560 | 526,475 | 33,030 | 237,055 | 47,418 | 380,155 | 226 | 39 |

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

NOTE: ... = not applicable.

CONTACT: Dana N. Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

Table 6.F2—Number, by reason for termination and type of benefit, 2003

| Reason for termination | All benefits | Retired workers | Disabled workers | Wives and husbands | Children | Widowed mothers and fathers | Widow(er)s and parents | Special age-72 beneficiaries |
|---|--------------|-----------------|------------------|--------------------|----------|-----------------------------|------------------------|------------------------------|
| Total | 3,411,500 | 1,447,461 | 447,485 | 292,156 | 796,560 | 47,418 | 380,381 | 39 |
| Death of beneficiary | 1,998,287 | 1,391,591 | 185,209 | 79,292 | 19,114 | 974 | 322,068 | 39 |
| Death of worker | 169,692 | ... | ... | 141,531 | 28,161 | ... | ... | ... |
| Marriage, remarriage, or divorce of beneficiary | 23,709 | ... | ... | 4,391 | 7,191 | 8,134 | 3,993 | ... |
| Attainment of age— | | | | | | | | |
| 16 by child | 57,885 | ... | ... | 24,639 | ... | 33,246 | ... | ... |
| 18 by child | 418,369 | ... | ... | ... | 418,369 | ... | ... | ... |
| 19 by student | 11,693 | ... | ... | ... | 11,693 | ... | ... | ... |
| FRA by disabled worker | 225,519 | ... | 199,662 | 15,817 | 10,040 | ... | ... | ... |
| FRA by disabled widow(er) | 12,378 | ... | ... | ... | ... | ... | 12,378 | ... |
| Entitlement to an equal or larger Social Security benefit | 93,798 | 40,963 | 4,105 | 7,026 | 3,717 | 2,663 | 35,324 | ... |
| Does not meet medical standards ^a | | | | | | | | |
| Disabled worker or widow(er) | 94,283 | ... | 53,396 | 2,177 | 38,420 | ... | 290 | ... |
| Disabled adult child | 3,608 | ... | ... | ... | 3,608 | ... | ... | ... |
| Student no longer attending school | 220,287 | ... | ... | ... | 220,287 | ... | ... | ... |
| Other | 81,992 | 14,907 | 5,113 | 17,283 | 35,960 | 2,401 | 6,328 | ... |

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

NOTE: ... = not applicable; FRA = full retirement age.

a. Excludes disabled beneficiaries whose monthly benefits have been suspended because of their ability to engage in substantial gainful activity. These persons continue to be eligible for Medicare for a 3-year period.

CONTACT: Dana N. 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, 2003

| 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 | 243,187 | 48,969 | 50,326 | 195,526 | 280,623 | 6,091 | 17,463 | 9,476 | 29,650 | 115,204 | 92,201 |
| Death of beneficiary | 77,871 | 1,421 | 158 | 1,119 | 714 | 3,076 | 13,365 | 544 | 18 | 81 | 39 |
| Death of worker | 135,055 | 6,476 | ... | ... | 25,307 | ... | ... | 1,676 | ... | ... | 1,178 |
| Marriage, remarriage, or divorce of beneficiary | 1,881 | 2,510 | 577 | 913 | 3,288 | 256 | 1,240 | 356 | 77 | 227 | 257 |
| Attainment of age— | | | | | | | | | | | |
| 16 by child | 8,541 | 16,098 | ... | ... | ... | ... | ... | ... | ... | ... | ... |
| 18 by child | ... | ... | 46,742 | 190,395 | 181,232 | ... | ... | ... | ... | ... | ... |
| 19 by student | ... | ... | ... | ... | ... | ... | ... | ... | 1,498 | 5,347 | 4,848 |
| FRA by disabled worker | ... | 15,817 | ... | ... | 5,839 | ... | ... | 3,874 | ... | ... | 327 |
| Entitlement to an equal or larger Social Security benefit | 5,521 | 1,505 | 1,834 | 219 | 795 | 391 | 194 | 177 | 64 | 8 | 35 |
| Does not meet medical standards ^a | | | | | | | | | | | |
| Disabled worker | ... | 2,177 | ... | ... | 36,682 | ... | ... | 1,377 | ... | ... | 361 |
| Disabled adult child | ... | ... | ... | ... | ... | 795 | 2,450 | 363 | ... | ... | ... |
| Student no longer attending school | ... | ... | ... | ... | ... | ... | ... | ... | 27,665 | 108,870 | 83,752 |
| Other | 14,318 | 2,965 | 1,015 | 2,880 | 26,766 | 1,573 | 214 | 1,109 | 328 | 671 | 1,404 |

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

NOTE: ... = not applicable; FRA = full retirement age.

a. Excludes disabled beneficiaries whose monthly benefits have been suspended because of their ability to engage in substantial gainful activity. These persons continue to be eligible for Medicare for a 3-year period.

CONTACT: Dana N. Mercer (410) 966-6377 or Robert L. Hackendorf (410) 965-5536.

Section 7. Supplemental Security Income

| | |
|----------------------------------|-------------|
| Summary | 7.1 |
| State Data | 7.7 |
| Benefit Distributions | 7.14 |
| Other Income Sources | 7.15 |
| Recipient Characteristics | 7.17 |

Table 7.A1—Number of recipients of federally administered payments, total payments, and average monthly payment, by source of payment, eligibility category, and age, December 2003

| Source of payment | Total | Category | | | Age | | |
|---|-----------|-----------|--------|-----------|----------|-----------|--------------------------|
| | | Aged | Blind | Disabled | Under 18 | 18–64 | 65 or older ^a |
| Number of recipients | | | | | | | |
| Total | 6,902,364 | 1,232,778 | 77,082 | 5,592,504 | 959,379 | 3,953,248 | 1,989,737 |
| Federal payment only | 4,435,248 | 629,971 | 42,940 | 3,762,337 | 706,284 | 2,643,061 | 1,085,903 |
| Federal payment and state supplementation | 2,179,217 | 502,976 | 28,681 | 1,647,560 | 249,979 | 1,167,999 | 761,239 |
| State supplementation only | 287,899 | 99,831 | 5,461 | 182,607 | 3,116 | 142,188 | 142,595 |
| Total with— | | | | | | | |
| Federal payment | 6,614,465 | 1,132,947 | 71,621 | 5,409,897 | 956,263 | 3,811,060 | 1,847,142 |
| State supplementation | 2,467,116 | 602,807 | 34,142 | 1,830,167 | 253,095 | 1,310,187 | 903,834 |
| Total payments ^b (thousands of dollars) | | | | | | | |
| Total | 3,077,819 | 424,774 | 35,646 | 2,617,398 | 502,763 | 1,886,790 | 688,266 |
| Federal payments | 2,721,097 | 327,311 | 28,316 | 2,365,469 | 484,581 | 1,692,999 | 543,517 |
| State supplementation | 356,722 | 97,463 | 7,330 | 251,929 | 18,182 | 193,791 | 144,749 |
| Average monthly payment ^c (dollars) | | | | | | | |
| Total | 417.16 | 342.28 | 454.84 | 433.16 | 490.63 | 436.37 | 343.77 |
| Federal payments | 383.59 | 287.10 | 389.19 | 403.76 | 474.39 | 405.08 | 292.56 |
| State supplementation | 138.38 | 160.02 | 210.51 | 129.89 | 67.07 | 138.18 | 158.59 |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

a. Includes approximately 17,400 blind and 739,500 disabled persons aged 65 or older.

b. Includes retroactive payments.

c. Excludes retroactive payments.

CONTACT: Art Kahn (410) 965-0186.

Table 7.A2—Number of individuals and couples receiving federally administered payments, total payments, and average monthly payment, by source of payment and eligibility category, December 2003

| Source of payment | Aged | | Blind | | Disabled | | Blind and disabled under age 18 |
|---|------------|---------|------------|--------|------------|---------|---------------------------------|
| | Individual | Couple | Individual | Couple | Individual | Couple | |
| Number of recipients | | | | | | | |
| Total | 973,888 | 133,206 | 65,616 | 2,932 | 4,341,667 | 144,769 | 959,379 |
| Federal payment only | 527,964 | 52,002 | 36,888 | 1,242 | 2,891,776 | 82,859 | 706,284 |
| Federal payment and state supplementation | 372,349 | 68,232 | 23,816 | 1,425 | 1,285,682 | 54,363 | 249,979 |
| State supplementation only | 73,575 | 12,972 | 4,912 | 265 | 164,209 | 7,547 | 3,116 |
| Total with— | | | | | | | |
| Federal payment | 900,313 | 120,234 | 60,704 | 2,667 | 4,177,458 | 137,222 | 956,263 |
| State supplementation | 445,924 | 81,204 | 28,728 | 1,690 | 1,449,891 | 61,910 | 253,095 |
| Total payments ^a (thousands of dollars) | | | | | | | |
| Total | 327,352 | 101,925 | 29,923 | 2,574 | 2,009,443 | 103,839 | 502,763 |
| Federal payments | 260,742 | 69,928 | 23,921 | 1,634 | 1,798,996 | 81,296 | 484,581 |
| State supplementation | 66,611 | 31,997 | 6,002 | 941 | 210,447 | 22,543 | 18,182 |
| Average monthly payment (dollars) | | | | | | | |
| Total | 334.31 | 755.14 | 448.95 | 858.87 | 426.43 | 685.97 | 490.63 |
| Federal payments | 288.15 | 574.08 | 388.15 | 600.30 | 395.61 | 566.24 | 474.39 |
| State supplementation | 147.75 | 389.93 | 204.94 | 550.93 | 136.81 | 350.99 | 67.07 |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

a. Includes retroactive payments.

CONTACT: Art Kahn (410) 965-0186.

7.A SSI: Summary

Table 7.A3—Number of recipients, by eligibility category and source of payment, January 1974 and December 1975–2003, selected years

| Month and year | Total | Federally administered | Federal SSI | State supplementation | | | | |
|-----------------------|-----------|------------------------|-------------|-----------------------|---|-----------------------------|---|-------------------------|
| | | | | Total | Federally administered | | State administered | |
| | | | | | Total, federally administered supplementation | Federally administered only | Total, state administered supplementation | State administered only |
| All recipients | | | | | | | | |
| 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 |
| 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 |
| 2002 | 6,939,846 | 6,787,857 | 6,505,227 | 3,014,219 | 2,461,652 | 282,630 | 552,567 | 151,989 |
| 2003 | 7,051,985 | 6,902,364 | 6,614,465 | 3,018,585 | 2,467,116 | 287,899 | 551,469 | 149,621 |
| Aged | | | | | | | | |
| 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 |
| 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 |
| 2002 | 1,291,394 | 1,251,528 | 1,151,652 | 750,246 | 611,395 | 99,876 | 138,851 | 39,866 |
| 2003 | 1,272,051 | 1,232,778 | 1,132,947 | 736,661 | 602,807 | 99,831 | 133,854 | 39,273 |
| Blind | | | | | | | | |
| 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 |
| 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 |
| 2002 | 78,476 | 77,658 | 72,189 | 39,123 | 34,596 | 5,469 | 4,527 | 818 |
| 2003 | 78,029 | 77,082 | 71,621 | 38,630 | 34,142 | 5,461 | 4,488 | 947 |
| Disabled | | | | | | | | |
| 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 |
| 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 |
| 2002 | 5,496,622 | 5,458,671 | 5,281,386 | 2,147,705 | 1,815,661 | 177,285 | 332,044 | 37,951 |
| 2003 | 5,628,524 | 5,592,504 | 5,409,897 | 2,164,323 | 1,830,167 | 182,607 | 334,156 | 36,020 |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: Art Kahn (410) 965-0186.

**Table 7.A4—Total payments, by eligibility category and source of payment, selected years 1974–2003
(in thousands of dollars)**

| Year | Total | Federally administered | Federal SSI | State supplementation | | | |
|-----------------------|------------|------------------------|-------------|-----------------------|------------------------|---------------------------------|--|
| | | | | Total | Federally administered | State administered ^a | |
| All recipients | | | | | | | |
| 1974 | 5,245,719 | 5,096,813 | 3,833,161 | 1,412,558 | 1,263,652 | 148,906 | |
| 1975 | 5,878,224 | 5,716,072 | 4,313,538 | 1,564,686 | 1,402,534 | 162,152 | |
| 1980 | 7,940,734 | 7,714,640 | 5,866,354 | 2,074,380 | 1,848,286 | 226,094 | |
| 1985 | 11,060,476 | 10,749,938 | 8,777,341 | 2,283,135 | 1,972,597 | 310,538 | |
| 1990 | 16,598,680 | 16,132,959 | 12,893,805 | 3,704,875 | 3,239,154 | 465,721 | |
| 1995 | 27,627,658 | 27,037,280 | 23,919,430 | 3,708,228 | 3,117,850 | 590,378 | |
| 2000 | 31,564,439 | 30,671,699 | 27,290,248 | 4,274,191 | 3,381,451 | 892,740 | |
| 2001 | 33,060,819 | 32,165,856 | 28,705,503 | 4,355,316 | 3,460,353 | 894,963 | |
| 2002 | 34,566,844 | 33,718,999 | 29,898,765 | 4,668,079 | 3,820,234 | 847,845 | |
| 2003 | 35,604,829 | 34,693,278 | 30,688,029 | 4,916,800 | 4,005,249 | 911,551 | |
| Aged | | | | | | | |
| 1974 | 2,503,407 | 2,414,034 | 1,782,742 | 720,665 | 631,292 | 89,373 | |
| 1975 | 2,604,792 | 2,516,515 | 1,842,980 | 761,812 | 673,535 | 88,277 | |
| 1980 | 2,734,270 | 2,617,023 | 1,860,194 | 874,076 | 756,829 | 117,247 | |
| 1985 | 3,034,596 | 2,896,671 | 2,202,557 | 832,039 | 694,114 | 137,925 | |
| 1990 | 3,736,104 | 3,559,388 | 2,521,382 | 1,214,722 | 1,038,006 | 176,716 | |
| 1995 | 4,467,146 | 4,239,222 | 3,374,772 | 1,092,374 | 864,450 | 227,924 | |
| 2000 | 4,811,048 | 4,537,914 | 3,595,384 | 1,225,603 | 942,530 | 283,073 | |
| 2001 | 4,958,644 | 4,664,076 | 3,708,527 | 1,250,117 | 955,549 | 294,568 | |
| 2002 | 5,085,554 | 4,802,792 | 3,751,491 | 1,334,063 | 1,051,301 | 282,762 | |
| 2003 | 5,147,380 | 4,856,875 | 3,758,070 | 1,389,310 | 1,098,805 | 290,505 | |
| Blind | | | | | | | |
| 1974 | 130,195 | 125,791 | 91,308 | 38,887 | 34,483 | 4,404 | |
| 1975 | 130,936 | 127,240 | 92,427 | 38,509 | 34,813 | 3,696 | |
| 1980 | 190,075 | 185,827 | 131,506 | 58,569 | 54,321 | 4,248 | |
| 1985 | 264,162 | 259,840 | 195,183 | 68,979 | 64,657 | 4,322 | |
| 1990 | 334,120 | 328,949 | 238,415 | 95,705 | 90,534 | 5,171 | |
| 1995 | 375,512 | 367,441 | 298,238 | 77,274 | 69,203 | 8,071 | |
| 2000 | 394,484 | 385,832 | 312,144 | 82,324 | 73,688 | 8,636 | |
| 2001 | 407,371 | 398,624 | 323,895 | 83,476 | 74,729 | 8,747 | |
| 2002 | 426,409 | 416,454 | 335,405 | 91,004 | 81,049 | 9,955 | |
| 2003 | 419,352 | 409,293 | 325,878 | 93,473 | 83,415 | 10,058 | |
| Disabled | | | | | | | |
| 1974 | 2,601,936 | 2,556,988 | 1,959,112 | 642,824 | 597,876 | 44,948 | |
| 1975 | 3,142,476 | 3,072,317 | 2,378,131 | 764,345 | 694,186 | 70,159 | |
| 1980 | 5,013,948 | 4,911,792 | 3,874,655 | 1,139,293 | 1,037,137 | 102,156 | |
| 1985 | 7,754,588 | 7,593,427 | 6,379,601 | 1,374,987 | 1,213,826 | 161,161 | |
| 1990 | 12,520,568 | 12,244,622 | 10,134,007 | 2,386,561 | 2,110,615 | 275,946 | |
| 1995 | 22,778,547 | 22,430,612 | 20,246,415 | 2,532,132 | 2,184,197 | 347,935 | |
| 2000 | 26,189,350 | 25,764,675 | 23,399,442 | 2,844,868 | 2,365,233 | 479,635 | |
| 2001 | 27,611,303 | 27,125,707 | 24,695,630 | 2,915,673 | 2,430,077 | 485,596 | |
| 2002 | 28,996,405 | 28,531,939 | 25,844,055 | 3,184,518 | 2,687,884 | 496,634 | |
| 2003 | 29,966,210 | 29,453,803 | 26,630,775 | 3,359,810 | 2,823,028 | 536,782 | |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

a. Includes data not distributed by category.

CONTACT: Stella M. Coleman (410) 965-0157 or Alfreda Brooks (410) 965-9849.

7.A SSI: Summary

Table 7.A5—Average monthly payment, by eligibility category and source of payment, December 1975–2003, selected years (in dollars)

| Year | Total | Federally administered | Federal SSI | State supplementation | | | |
|-----------------------|--------|------------------------|-------------|-----------------------|------------------------|---------------------------------|--|
| | | | | Total | Federally administered | State administered ^a | |
| All recipients | | | | | | | |
| 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 | |
| 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 | |
| 2002 | 408.64 | 407.42 | 376.76 | 127.45 | 127.53 | 110.62 | |
| 2003 | 418.04 | 417.16 | 383.59 | 135.80 | 138.38 | 124.38 | |
| Aged | | | | | | | |
| 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 | |
| 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 | |
| 2002 | 338.01 | 330.04 | 280.86 | 150.29 | 146.17 | 168.24 | |
| 2003 | 349.55 | 342.28 | 287.10 | 161.67 | 160.02 | 169.01 | |
| Blind | | | | | | | |
| 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 | |
| 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 | |
| 2002 | 449.41 | 444.54 | 384.79 | 190.78 | 194.31 | 163.91 | |
| 2003 | 458.98 | 454.85 | 389.20 | 205.46 | 210.51 | 167.34 | |
| Disabled | | | | | | | |
| 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 | |
| 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 | |
| 2002 | 429.37 | 424.75 | 397.71 | 120.55 | 119.94 | 123.81 | |
| 2003 | 437.57 | 433.16 | 403.76 | 128.39 | 129.89 | 120.26 | |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: Excludes retroactive payments.

a. Includes data not distributed by category.

CONTACT: Art Kahn (410) 965-0186.

Table 7.A8—Number of federally administered awards, by eligibility category and age, 1974–2003

| Year | Total | Category | | | Age | | |
|--------------------------------|------------|-----------|---------|------------|-----------|------------|-------------|
| | | Aged | Blind | Disabled | Under 18 | 18–64 | 65 or older |
| All awards | 24,682,560 | 7,261,440 | 292,490 | 17,128,630 | 3,001,250 | 14,265,430 | 7,415,880 |
| State conversions ^a | 3,158,410 | 1,763,250 | 77,660 | 1,317,500 | 2,620 | 1,305,060 | 1,850,730 |
| Federal applications | | | | | | | |
| 1974 | 1,329,870 | 767,340 | 8,230 | 554,300 | 66,880 | 491,170 | 771,820 |
| 1975 | 927,800 | 349,800 | 9,020 | 568,980 | 62,880 | 508,950 | 355,970 |
| 1976 | 674,580 | 222,600 | 6,990 | 444,990 | 45,030 | 403,350 | 226,200 |
| 1977 | 643,480 | 213,990 | 8,180 | 421,310 | 50,970 | 375,950 | 216,560 |
| 1978 | 566,190 | 193,610 | 7,860 | 364,720 | 47,050 | 323,170 | 195,970 |
| 1979 | 517,010 | 176,980 | 7,820 | 332,210 | 45,810 | 292,380 | 178,820 |
| 1980 | 526,790 | 185,150 | 8,790 | 332,850 | 46,260 | 293,740 | 186,790 |
| 1981 | 411,510 | 122,680 | 8,180 | 280,650 | 39,050 | 248,340 | 124,120 |
| 1982 | 342,680 | 103,330 | 6,770 | 232,580 | 35,670 | 202,590 | 104,420 |
| 1983 | 458,610 | 152,730 | 7,730 | 298,150 | 42,110 | 262,660 | 153,840 |
| 1984 | 586,670 | 217,100 | 8,780 | 360,790 | 45,740 | 322,390 | 218,540 |
| 1985 | 527,800 | 155,820 | 8,220 | 363,760 | 46,590 | 324,070 | 157,140 |
| 1986 | 603,580 | 159,590 | 7,770 | 436,220 | 51,020 | 391,600 | 160,960 |
| 1987 | 589,440 | 166,210 | 8,290 | 414,940 | 48,480 | 373,320 | 167,640 |
| 1988 | 578,370 | 168,720 | 7,130 | 402,520 | 47,560 | 361,070 | 169,740 |
| 1989 | 629,460 | 188,280 | 7,010 | 434,170 | 51,520 | 388,120 | 189,820 |
| 1990 | 718,310 | 193,680 | 7,820 | 516,810 | 76,070 | 446,940 | 195,300 |
| 1991 | 822,890 | 190,000 | 7,480 | 625,410 | 126,190 | 504,860 | 191,840 |
| 1992 | 1,049,260 | 190,840 | 8,210 | 850,210 | 221,080 | 636,300 | 191,880 |
| 1993 | 1,054,170 | 186,420 | 6,870 | 860,880 | 236,220 | 630,030 | 187,920 |
| 1994 | 944,830 | 158,900 | 6,470 | 779,460 | 203,190 | 580,640 | 161,000 |
| 1995 | 893,460 | 142,830 | 5,800 | 744,830 | 177,550 | 571,080 | 144,830 |
| 1996 | 797,970 | 124,650 | 5,400 | 667,920 | 144,270 | 526,690 | 127,010 |
| 1997 | 673,340 | 94,230 | 4,920 | 574,190 | 116,280 | 461,260 | 95,800 |
| 1998 | 739,410 | 109,570 | 6,440 | 623,400 | 135,600 | 489,240 | 114,570 |
| 1999 | 757,270 | 121,000 | 5,940 | 630,330 | 139,400 | 493,960 | 123,910 |
| 2000 | 747,010 | 116,610 | 5,930 | 624,470 | 144,540 | 483,020 | 119,450 |
| 2001 | 770,340 | 107,950 | 6,110 | 656,280 | 156,900 | 502,590 | 110,850 |
| 2002 | 818,050 | 112,950 | 5,750 | 699,350 | 169,130 | 533,470 | 115,450 |
| 2003 | 824,000 | 104,630 | 4,920 | 714,450 | 179,590 | 537,420 | 106,990 |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 10 percent sample.

NOTE: Represents period in which first payment was made, not date of entitlement to payments.

a. Persons who were converted in 1973 from the state Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled programs to the SSI program.

CONTACT: Clark Pickett (410) 965-9016.

7.A SSI: Summary

Table 7.A9—Number of recipients of federally administered payments, by eligibility category and age, December 1974–2003

| Year | Total | Category | | | Age | | |
|------|-----------|-----------|--------|-----------|----------|-----------|-------------|
| | | Aged | Blind | Disabled | Under 18 | 18–64 | 65 or older |
| 1974 | 3,996,064 | 2,285,909 | 74,616 | 1,635,539 | 70,900 | 1,503,155 | 2,422,009 |
| 1975 | 4,314,275 | 2,307,105 | 74,489 | 1,932,681 | 107,026 | 1,699,394 | 2,507,855 |
| 1976 | 4,235,939 | 2,147,697 | 76,366 | 2,011,876 | 125,412 | 1,713,594 | 2,396,933 |
| 1977 | 4,237,692 | 2,050,921 | 77,362 | 2,109,409 | 147,355 | 1,736,879 | 2,353,458 |
| 1978 | 4,216,925 | 1,967,900 | 76,895 | 2,171,890 | 165,899 | 1,747,126 | 2,303,900 |
| 1979 | 4,149,575 | 1,871,716 | 77,250 | 2,200,609 | 177,306 | 1,726,553 | 2,245,716 |
| 1980 | 4,142,017 | 1,807,776 | 78,401 | 2,255,840 | 190,394 | 1,730,847 | 2,220,776 |
| 1981 | 4,018,875 | 1,678,090 | 78,570 | 2,262,215 | 194,890 | 1,702,895 | 2,121,090 |
| 1982 | 3,857,590 | 1,548,741 | 77,356 | 2,231,493 | 191,570 | 1,655,279 | 2,010,741 |
| 1983 | 3,901,497 | 1,515,400 | 78,960 | 2,307,137 | 198,323 | 1,699,774 | 2,003,400 |
| 1984 | 4,029,333 | 1,530,287 | 80,524 | 2,418,522 | 211,587 | 1,780,459 | 2,037,287 |
| 1985 | 4,138,021 | 1,504,469 | 82,220 | 2,551,332 | 227,384 | 1,879,168 | 2,031,469 |
| 1986 | 4,269,184 | 1,473,428 | 83,115 | 2,712,641 | 241,198 | 2,010,458 | 2,017,528 |
| 1987 | 4,384,999 | 1,455,387 | 83,421 | 2,846,191 | 250,902 | 2,118,710 | 2,015,387 |
| 1988 | 4,463,869 | 1,433,420 | 82,864 | 2,947,585 | 255,135 | 2,202,714 | 2,006,020 |
| 1989 | 4,593,059 | 1,439,043 | 82,765 | 3,071,251 | 264,890 | 2,301,926 | 2,026,243 |
| 1990 | 4,817,127 | 1,454,041 | 83,686 | 3,279,400 | 308,589 | 2,449,897 | 2,058,641 |
| 1991 | 5,118,470 | 1,464,684 | 84,549 | 3,569,237 | 397,162 | 2,641,524 | 2,079,784 |
| 1992 | 5,566,189 | 1,471,022 | 85,400 | 4,009,767 | 556,470 | 2,910,016 | 2,099,703 |
| 1993 | 5,984,330 | 1,474,852 | 85,456 | 4,424,022 | 722,678 | 3,148,413 | 2,113,239 |
| 1994 | 6,295,786 | 1,465,905 | 84,911 | 4,744,970 | 841,474 | 3,335,255 | 2,119,057 |
| 1995 | 6,514,134 | 1,446,122 | 83,545 | 4,984,467 | 917,048 | 3,482,256 | 2,114,830 |
| 1996 | 6,613,718 | 1,412,632 | 82,137 | 5,118,949 | 955,174 | 3,568,393 | 2,090,151 |
| 1997 | 6,494,985 | 1,362,350 | 80,778 | 5,051,857 | 879,828 | 3,561,625 | 2,053,532 |
| 1998 | 6,566,069 | 1,331,782 | 80,243 | 5,154,044 | 887,066 | 3,646,020 | 2,032,983 |
| 1999 | 6,556,634 | 1,308,062 | 79,291 | 5,169,281 | 847,063 | 3,690,970 | 2,018,601 |
| 2000 | 6,601,686 | 1,289,339 | 78,511 | 5,233,836 | 846,784 | 3,744,022 | 2,010,880 |
| 2001 | 6,688,489 | 1,264,463 | 78,255 | 5,345,771 | 881,836 | 3,811,494 | 1,995,159 |
| 2002 | 6,787,857 | 1,251,528 | 77,658 | 5,458,671 | 914,821 | 3,877,752 | 1,995,284 |
| 2003 | 6,902,364 | 1,232,778 | 77,082 | 5,592,504 | 959,379 | 3,953,248 | 1,989,737 |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: Art Kahn (410) 965-0186.

Table 7.B1—Number of recipients of federally administered payments, December 2003, and total payments for calendar year 2003, by state or other area and eligibility category

| State or area | Number | | | | Total payments (thousands of dollars) | | | |
|--------------------------|-----------|-----------|--------------------|-----------------------|---------------------------------------|-----------|---------|------------|
| | Total | Aged | Blind ^a | Disabled ^b | Total | Aged | Blind | Disabled |
| All areas ^c | 6,902,364 | 1,232,778 | 77,082 | 5,592,504 | 34,695,598 | 4,856,876 | 409,294 | 29,429,428 |
| Alabama | 163,760 | 21,010 | 1,029 | 141,721 | 737,864 | 43,484 | 4,314 | 690,066 |
| Alaska | 10,639 | 2,230 | 107 | 8,302 | 46,649 | 5,214 | 484 | 40,952 |
| Arizona | 91,655 | 13,211 | 924 | 77,520 | 429,265 | 42,839 | 4,450 | 381,976 |
| Arkansas | 86,542 | 11,177 | 873 | 74,492 | 361,449 | 20,117 | 3,676 | 337,656 |
| California | 1,162,725 | 345,911 | 21,951 | 794,863 | 7,573,189 | 1,992,280 | 155,659 | 5,425,250 |
| Colorado | 53,988 | 8,537 | 555 | 44,896 | 245,609 | 28,256 | 2,538 | 214,816 |
| Connecticut | 51,151 | 6,937 | 505 | 43,709 | 244,248 | 25,153 | 2,351 | 216,745 |
| Delaware | 12,930 | 1,304 | 115 | 11,511 | 58,853 | 3,636 | 491 | 54,726 |
| District of Columbia | 20,403 | 2,154 | 175 | 18,074 | 104,754 | 6,573 | 861 | 97,320 |
| Florida | 409,400 | 95,566 | 3,166 | 310,668 | 1,907,671 | 345,419 | 14,553 | 1,547,699 |
| Georgia | 199,733 | 29,689 | 2,175 | 167,869 | 887,534 | 70,407 | 9,843 | 807,283 |
| Hawaii | 21,753 | 6,532 | 189 | 15,032 | 112,546 | 27,343 | 1,001 | 84,202 |
| Idaho | 20,258 | 1,716 | 216 | 18,326 | 90,651 | 4,047 | 935 | 85,668 |
| Illinois | 255,445 | 30,895 | 2,426 | 222,124 | 1,266,721 | 117,982 | 11,368 | 1,137,371 |
| Indiana | 93,963 | 6,311 | 999 | 86,653 | 440,514 | 15,872 | 4,334 | 420,308 |
| Iowa | 41,869 | 3,837 | 792 | 37,240 | 176,138 | 8,791 | 3,218 | 164,129 |
| Kansas | 37,805 | 3,475 | 376 | 33,954 | 169,930 | 9,249 | 1,692 | 158,989 |
| Kentucky | 178,900 | 15,733 | 1,358 | 161,809 | 819,136 | 33,934 | 6,050 | 779,152 |
| Louisiana | 167,800 | 20,708 | 1,785 | 145,307 | 768,662 | 47,163 | 7,738 | 713,761 |
| Maine | 31,403 | 2,746 | 223 | 28,434 | 135,931 | 5,141 | 968 | 129,822 |
| Maryland | 90,962 | 15,532 | 711 | 74,719 | 441,479 | 54,462 | 3,362 | 383,655 |
| Massachusetts | 168,171 | 44,813 | 4,038 | 119,320 | 854,601 | 182,562 | 21,766 | 650,273 |
| Michigan | 216,727 | 17,629 | 1,818 | 197,280 | 1,086,326 | 58,071 | 8,589 | 1,019,666 |
| Minnesota | 68,971 | 9,804 | 722 | 58,445 | 316,267 | 33,123 | 3,310 | 279,834 |
| Mississippi | 126,301 | 17,538 | 1,133 | 107,630 | 550,133 | 35,848 | 4,701 | 509,584 |
| Missouri | 115,069 | 10,606 | 970 | 103,493 | 528,033 | 25,755 | 4,231 | 498,048 |
| Montana | 14,356 | 1,209 | 132 | 13,015 | 63,633 | 2,519 | 588 | 60,526 |
| Nebraska | 21,875 | 2,186 | 243 | 19,446 | 95,263 | 5,444 | 1,025 | 88,794 |
| Nevada | 30,815 | 7,883 | 708 | 22,224 | 144,194 | 26,942 | 3,723 | 113,529 |
| New Hampshire | 12,709 | 926 | 139 | 11,644 | 57,997 | 2,604 | 582 | 54,811 |
| New Jersey | 149,580 | 33,670 | 1,015 | 114,895 | 731,586 | 133,338 | 4,881 | 593,367 |
| New Mexico | 50,169 | 8,710 | 519 | 40,940 | 222,902 | 23,562 | 2,314 | 197,026 |
| New York | 624,565 | 134,095 | 3,131 | 487,339 | 3,400,463 | 590,490 | 15,662 | 2,794,311 |
| North Carolina | 194,424 | 28,237 | 1,958 | 164,229 | 824,976 | 60,879 | 8,249 | 755,848 |
| North Dakota | 8,092 | 1,144 | 80 | 6,868 | 31,856 | 2,577 | 353 | 28,926 |
| Ohio | 243,584 | 15,934 | 2,092 | 225,558 | 1,203,950 | 47,775 | 9,637 | 1,146,538 |
| Oklahoma | 75,202 | 8,938 | 812 | 65,452 | 338,924 | 20,772 | 3,709 | 314,443 |
| Oregon | 57,436 | 7,570 | 649 | 49,217 | 271,165 | 24,563 | 2,996 | 243,606 |
| Pennsylvania | 310,617 | 32,895 | 2,368 | 275,354 | 1,599,027 | 108,098 | 11,439 | 1,479,491 |
| Rhode Island | 29,196 | 4,155 | 198 | 24,843 | 149,950 | 14,981 | 923 | 134,046 |
| South Carolina | 105,621 | 13,864 | 1,482 | 90,275 | 461,420 | 30,153 | 6,354 | 424,913 |
| South Dakota | 12,577 | 1,777 | 99 | 10,701 | 51,674 | 3,796 | 447 | 47,431 |
| Tennessee | 161,246 | 18,843 | 1,604 | 140,799 | 718,938 | 40,074 | 7,414 | 671,450 |
| Texas | 454,857 | 111,225 | 6,219 | 337,413 | 1,901,120 | 307,052 | 27,173 | 1,566,895 |
| Utah | 21,357 | 2,131 | 266 | 18,960 | 99,123 | 7,558 | 1,225 | 90,340 |
| Vermont | 12,841 | 1,308 | 102 | 11,431 | 57,441 | 2,869 | 467 | 54,105 |
| Virginia | 133,607 | 22,155 | 1,356 | 110,096 | 586,507 | 66,167 | 5,895 | 514,444 |
| Washington | 108,977 | 14,179 | 954 | 93,844 | 545,684 | 57,444 | 4,381 | 483,860 |
| West Virginia | 75,227 | 4,694 | 598 | 69,935 | 357,404 | 9,881 | 2,691 | 344,833 |
| Wisconsin | 88,736 | 8,818 | 965 | 78,953 | 397,850 | 23,073 | 4,383 | 370,394 |
| Wyoming | 5,660 | 482 | 49 | 5,129 | 24,850 | 959 | 234 | 23,656 |
| Outlying area | | | | | | | | |
| Northern Mariana Islands | 715 | 149 | 13 | 553 | 3,548 | 587 | 65 | 2,895 |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

- a. Includes approximately 17,400 blind persons aged 65 or older.
b. Includes approximately 739,500 disabled persons aged 65 or older.
c. Includes data not distributed by state.

CONTACT: Art Kahn (410) 965-0186 or Stella M. Coleman (410) 965-0157.

7.B SSI: State Data

Table 7.B2—Number of recipients of state-administered supplementation, December 2003, and total payments for calendar year 2003, by state and eligibility category

| State | Number | | | | Total payments (thousands of dollars) | | | |
|---------------------------|--------------------|--------------|--------------|--------------|---------------------------------------|--------------|--------------|--------------|
| | Total ^a | Aged | Blind | Disabled | Total ^a | Aged | Blind | Disabled |
| All applicable states | 551,469 | 133,854 | 4,488 | 334,156 | 911,551 | 290,505 | 10,058 | 536,782 |
| Alabama | 517 | 189 | 8 | 320 | 418 | 164 | 6 | 248 |
| Alaska | 15,897 | 4,978 | 87 | 10,832 | 55,662 | 16,843 | 336 | 38,483 |
| Arizona | 457 | ... | ... | 457 | 374 | ... | ... | 374 |
| Colorado | 31,292 | 23,475 | 13 | 7,804 | 88,314 | 62,980 | 46 | 25,288 |
| Connecticut | 17,828 | 5,405 | 102 | 12,321 | 87,937 | 30,163 | 586 | 57,188 |
| Florida | 15,220 | 6,524 | 9 | 8,687 | 19,813 | 3,842 | 8 | 15,963 |
| Idaho | 11,640 | 2,103 | 24 | 9,513 | 7,536 | 1,182 | 23 | 6,331 |
| Illinois | 31,736 | 7,097 | 142 | 24,497 | 29,697 | 7,863 | 182 | 21,652 |
| Indiana | 1,140 | 525 | 6 | 609 | 3,780 | 1,397 | 14 | 2,369 |
| Iowa | 4,270 | 1,002 | ... | 3,268 | 16,599 | ^b | ^b | ^b |
| Kentucky | 4,614 | 1,816 | 26 | 2,772 | 18,640 | 7,380 | 86 | 11,174 |
| Louisiana | 5,044 | ^b | ^b | ^b | 502 | ^b | ^b | ^b |
| Maine | 32,557 | 4,856 | 95 | 27,606 | 19,027 | 3,073 | 54 | 15,900 |
| Maryland | 3,046 | ^b | ^b | ^b | 8,523 | ^b | ^b | ^b |
| Michigan | 67,090 | ^b | ^b | ^b | 78,467 | ^b | ^b | ^b |
| Minnesota | 31,743 | 80 | 169 | 31,494 | 91,005 | 9,943 | 238 | 80,824 |
| Missouri ^c | 9,017 | 2,938 | 885 | 5,194 | 26,304 | 8,893 | 3,627 | 13,784 |
| 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 | 177 | ^b | ^b | ^b | 233 | ^b | ^b | ^b |
| North Carolina | 23,580 | 12,447 | 98 | 11,035 | 140,081 | 70,984 | 763 | 68,334 |
| North Dakota ^c | 355 | ^b | ^b | 203 | 1,932 | 831 | ^b | 1,086 |
| Oklahoma | 74,437 | 20,115 | 482 | 53,840 | 37,450 | 9,264 | 267 | 27,919 |
| Oregon | 16,972 | 4,710 | 706 | 11,556 | 20,276 | 17,811 | 385 | 2,080 |
| South Carolina | 3,094 | 1,463 | 12 | 1,619 | 22,190 | 5,698 | 61 | 16,431 |
| South Dakota | 3,614 | ^b | ^b | ^b | 2,508 | ^b | ^b | ^b |
| Texas | 11,115 | 2,980 | 145 | 7,990 | 1,967 | 989 | 36 | 942 |
| Virginia | 6,328 | 2,802 | 12 | 3,514 | 19,693 | 8,717 | 47 | 10,929 |
| Washington | 20 | 5 | ^b | 14 | 228 | 23 | ^b | 205 |
| Wisconsin | 95,706 | 10,773 | 1,048 | 83,885 | 126,804 | 19,225 | 2,487 | 105,092 |
| Wyoming | 2,746 | 60 | 31 | 2,655 | 687 | 18 | 10 | 659 |

SOURCE: Data reported to the Social Security Administration by individual states.

NOTES: All data are subject to revision.

... = not applicable.

- a. Includes data not distributed by category.
- b. Data not available.
- c. Excludes optional supplementation data.

CONTACT: Alfreda Brooks (410) 965-9849.

Table 7.B3—Number of recipients of federally administered payments and average monthly payment, by state or other area, December 2003

| State or area | Total | | Federal SSI | | State supplementation | | Number with— | | |
|----------------------|-----------|-----------------------------------|-------------|-----------------------------------|-----------------------|-----------------------------------|------------------|--|---|
| | Number | Average monthly payment (dollars) | Number | Average monthly payment (dollars) | Number | Average monthly payment (dollars) | Federal SSI only | Federal SSI and state supplementation ^a | State supplementation only ^a |
| All areas | 6,902,364 | 417.16 | 6,614,465 | 383.59 | 2,467,116 | 138.38 | 4,435,248 | 2,179,217 | 287,899 |
| Alabama | 163,760 | 362.08 | 163,760 | 362.08 | ... | ... | 163,746 | ... | ... |
| Alaska | 10,639 | 377.59 | 10,639 | 377.56 | ... | ... | 10,635 | ... | ... |
| Arizona | 91,655 | 392.13 | 91,654 | 392.10 | ... | ... | 91,619 | ... | ... |
| Arkansas | 86,542 | 344.49 | 86,542 | 344.47 | 20 | 116.17 | 86,522 | 20 | ^b |
| California | 1,162,725 | 553.13 | 966,913 | 398.59 | 1,161,810 | 221.20 | 915 | 965,998 | 195,812 |
| Colorado | 53,988 | 370.98 | 53,988 | 370.94 | ... | ... | 53,972 | ... | ... |
| Connecticut | 51,151 | 393.11 | 51,151 | 393.11 | ... | ... | 51,139 | ... | ... |
| Delaware | 12,930 | 378.01 | 12,782 | 375.73 | 679 | 124.01 | 12,251 | 531 | 148 |
| District of Columbia | 20,403 | 416.59 | 20,261 | 406.10 | 1,681 | 161.96 | 18,722 | 1,539 | 142 |
| Florida | 409,400 | 383.09 | 409,399 | 383.08 | 129 | 52.40 | 409,271 | 128 | ^b |
| Georgia | 199,733 | 358.36 | 199,732 | 358.36 | 50 | 49.19 | 199,683 | 49 | ^b |
| Hawaii | 21,753 | 426.96 | 20,840 | 395.13 | 2,405 | 448.24 | 19,348 | 1,492 | 913 |
| Idaho | 20,258 | 370.88 | 20,258 | 370.86 | ... | ... | 20,249 | ... | ... |
| Illinois | 255,445 | 416.43 | 255,445 | 416.42 | ... | ... | 255,422 | ... | ... |
| Indiana | 93,963 | 384.74 | 93,963 | 384.73 | ... | ... | 93,955 | ... | ... |
| Iowa | 41,869 | 355.42 | 41,579 | 351.60 | 1,704 | 153.38 | 40,165 | 1,414 | 290 |
| Kansas | 37,805 | 371.43 | 37,805 | 371.41 | 13 | 68.83 | 37,792 | 13 | ... |
| Kentucky | 178,900 | 381.12 | 178,900 | 381.12 | ... | ... | 178,892 | ... | ... |
| Louisiana | 167,800 | 377.35 | 167,799 | 377.34 | 27 | 92.42 | 167,773 | 26 | ^b |
| Maine | 31,403 | 349.41 | 31,403 | 349.41 | ... | ... | 31,397 | ... | ... |
| Maryland | 90,962 | 395.37 | 90,961 | 395.35 | 50 | 56.61 | 90,912 | 49 | ^b |
| Massachusetts | 168,171 | 427.02 | 150,340 | 386.48 | 167,857 | 81.50 | 314 | 150,026 | 17,831 |
| Michigan | 216,727 | 413.65 | 212,901 | 411.51 | 17,236 | 119.39 | 199,491 | 13,410 | 3,826 |
| Minnesota | 68,971 | 385.89 | 68,971 | 385.89 | ... | ... | 68,963 | ... | ... |
| Mississippi | 126,301 | 356.99 | 126,298 | 356.99 | 21 | 75.63 | 126,280 | 18 | ^b |
| Missouri | 115,069 | 374.28 | 115,067 | 374.27 | ... | ... | 115,046 | ... | ^b |
| Montana | 14,356 | 363.78 | 14,254 | 361.43 | 922 | 78.45 | 13,434 | 820 | 102 |
| Nebraska | 21,875 | 357.25 | 21,875 | 357.23 | ... | ... | 21,866 | ... | ... |
| Nevada | 30,815 | 384.59 | 30,011 | 380.21 | 8,504 | 51.31 | 22,311 | 7,700 | 804 |
| New Hampshire | 12,709 | 364.27 | 12,709 | 364.25 | ... | ... | 12,699 | ... | ... |
| New Jersey | 149,580 | 404.32 | 142,363 | 378.54 | 148,973 | 44.51 | 607 | 141,756 | 7,217 |
| New Mexico | 50,169 | 364.90 | 50,169 | 364.89 | ... | ... | 50,164 | ... | ... |
| New York | 624,565 | 449.99 | 580,150 | 406.23 | 605,209 | 74.91 | 19,356 | 560,794 | 44,415 |
| North Carolina | 194,424 | 344.53 | 194,423 | 344.52 | ... | ... | 194,392 | ... | ... |
| North Dakota | 8,092 | 328.32 | 8,092 | 328.32 | ... | ... | 8,092 | ... | ... |
| Ohio | 243,584 | 406.55 | 243,583 | 406.54 | 48 | 60.86 | 243,536 | 47 | ^b |
| Oklahoma | 75,202 | 369.27 | 75,202 | 369.25 | ... | ... | 75,191 | ... | ... |
| Oregon | 57,436 | 384.80 | 57,435 | 384.76 | ... | ... | 57,412 | ... | ... |
| Pennsylvania | 310,617 | 424.74 | 297,828 | 403.48 | 305,746 | 38.62 | 4,871 | 292,957 | 12,789 |
| Rhode Island | 29,196 | 418.07 | 26,728 | 386.12 | 29,162 | 64.58 | 34 | 26,694 | 2,468 |
| South Carolina | 105,621 | 355.81 | 105,621 | 355.80 | ... | ... | 105,601 | ... | ... |
| South Dakota | 12,577 | 342.68 | 12,577 | 342.63 | 11 | 49.00 | 12,566 | 11 | ... |
| Tennessee | 161,246 | 364.01 | 161,244 | 364.00 | 25 | 112.00 | 161,221 | 23 | ^b |
| Texas | 454,857 | 348.17 | 454,857 | 348.16 | ... | ... | 454,804 | ... | ... |
| Utah | 21,357 | 383.38 | 21,354 | 383.21 | 1,603 | 3.06 | 19,754 | 1,600 | ^b |

(Continued)

7.B SSI: State Data

Table 7.B3—Number of recipients of federally administered payments and average monthly payment, by state or other area, December 2003—Continued

| State or area | Total | | Federal SSI | | State supplementation | | Number with— | | |
|--------------------------|---------|-----------------------------------|-------------|-----------------------------------|-----------------------|-----------------------------------|------------------|--|---|
| | Number | Average monthly payment (dollars) | Number | Average monthly payment (dollars) | Number | Average monthly payment (dollars) | Federal SSI only | Federal SSI and state supplementation ^a | State supplementation only ^a |
| Vermont | 12,841 | 371.00 | 11,718 | 348.79 | 12,809 | 54.09 | 32 | 11,686 | 1,123 |
| Virginia | 133,607 | 362.93 | 133,607 | 362.92 | ... | ... | 133,572 | ... | ... |
| Washington | 108,977 | 411.44 | 108,976 | 411.40 | ... | ... | 108,930 | ... | ... |
| West Virginia | 75,227 | 390.14 | 75,227 | 390.13 | ... | ... | 75,223 | ... | ... |
| Wisconsin | 88,736 | 374.26 | 88,736 | 374.26 | ... | ... | 88,734 | ... | ... |
| Wyoming | 5,660 | 358.17 | 5,660 | 358.16 | ... | ... | 5,657 | ... | ... |
| Outlying area | | | | | | | | | |
| Northern Mariana Islands | 715 | 428.49 | 715 | 428.49 | ... | ... | 715 | ... | ... |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: ... = not applicable.

- a. Includes data not distributed by state.
- b. Not shown for 3 or fewer recipients.

CONTACT: Art Kahn (410) 965-0186.

Table 7.B7—Total payments, by state or other area and source of payment, 2003 (in thousands of dollars)

| State or area | Total | Federal SSI | State supplementation | |
|--------------------------|------------|-------------|------------------------|---------------------------------|
| | | | Federally administered | State administered ^a |
| All areas | 35,604,829 | 30,688,029 | 4,005,249 | 911,551 |
| Alabama | 738,282 | 737,864 | ... | 418 |
| Alaska | 102,312 | 46,650 | ... | 55,662 |
| Arizona | 429,640 | 429,266 | ... | 374 |
| Arkansas | 361,449 | 361,445 | 4 | ... |
| California | 7,573,189 | 4,594,264 | 2,978,925 | ... |
| Colorado | 333,924 | 245,610 | ... | 88,314 |
| Connecticut | 332,186 | 244,249 | ... | 87,937 |
| Delaware | 58,853 | 57,842 | 1,011 | ... |
| District of Columbia | 104,754 | 101,398 | 3,356 | ... |
| Florida | 1,927,484 | 1,907,671 | ... | 19,813 |
| Georgia | 887,534 | 887,521 | 13 | ... |
| Hawaii | 112,546 | 100,327 | 12,219 | ... |
| Idaho | 98,187 | 90,651 | ... | 7,536 |
| Illinois | 1,296,419 | 1,266,722 | ... | 29,697 |
| Indiana | 444,294 | 440,514 | ... | 3,780 |
| Iowa | 192,737 | 172,993 | 3,145 | 16,599 |
| Kansas | 169,930 | 169,930 | ... | ... |
| Kentucky | 837,776 | 819,136 | ... | 18,640 |
| Louisiana | 769,164 | 768,662 | ... | 502 |
| Maine | 154,958 | 135,931 | ... | 19,027 |
| Maryland | 450,002 | 441,463 | 16 | 8,523 |
| Massachusetts | 854,601 | 689,082 | 165,519 | ... |
| Michigan | 1,164,793 | 1,061,722 | 24,604 | 78,467 |
| Minnesota | 407,273 | 316,268 | ... | 91,005 |
| Mississippi | 550,133 | 550,119 | 14 | ... |
| Missouri | 554,337 | 528,033 | ... | 26,304 |
| Montana | 63,633 | 62,783 | 850 | ... |
| Nebraska | 101,570 | 95,263 | ... | 6,307 |
| Nevada | 144,194 | 138,933 | 5,261 | ... |
| New Hampshire | 69,594 | 57,997 | ... | 11,597 |
| New Jersey | 731,586 | 650,405 | 81,181 | ... |
| New Mexico | 223,135 | 222,902 | ... | 233 |
| New York | 3,400,463 | 2,848,138 | 552,325 | ... |
| North Carolina | 965,057 | 824,976 | ... | 140,081 |
| North Dakota | 33,788 | 31,856 | ... | 1,932 |
| Ohio | 1,203,950 | 1,203,941 | 9 | ... |
| Oklahoma | 376,375 | 338,925 | ... | 37,450 |
| Oregon | 291,441 | 271,165 | ... | 20,276 |
| Pennsylvania | 1,599,027 | 1,453,656 | 145,371 | ... |
| Rhode Island | 149,950 | 126,866 | 23,084 | ... |
| South Carolina | 483,611 | 461,421 | ... | 22,190 |
| South Dakota | 54,182 | 51,671 | 3 | 2,508 |
| Tennessee | 718,938 | 718,938 | ... | ... |
| Texas | 1,903,087 | 1,901,120 | ... | 1,967 |
| Utah | 99,124 | 99,067 | 56 | ... |
| Vermont | 57,441 | 49,013 | 8,428 | ... |
| Virginia | 606,200 | 586,507 | ... | 19,693 |
| Washington | 545,912 | 545,680 | 4 | 228 |
| West Virginia | 357,405 | 357,405 | ... | ... |
| Wisconsin | 524,654 | 397,850 | ... | 126,804 |
| Wyoming | 25,537 | 24,850 | ... | 687 |
| Outlying area | | | | |
| Northern Mariana Islands | 3,549 | 3,549 | ... | ... |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: ... = not applicable.

a. Includes data not distributed by state.

CONTACT: Stella M. Coleman (410) 965-0157 and Alfreda Brooks (410) 965-9849.

7.B SSI: State Data

Table 7.B8—Number of blind and disabled recipients of federally administered payments under age 18, by state or other area, December 2003

| State or area | Total | Blind | Disabled |
|--------------------------|---------|-------|----------|
| All areas | 959,379 | 6,759 | 952,620 |
| Alabama | 27,318 | 42 | 27,276 |
| Alaska | 1,054 | 8 | 1,046 |
| Arizona | 15,527 | 108 | 15,419 |
| Arkansas | 15,356 | 89 | 15,267 |
| California | 92,830 | 1,676 | 91,154 |
| Colorado | 6,580 | 32 | 6,548 |
| Connecticut | 6,277 | 51 | 6,226 |
| Delaware | 2,970 | 10 | 2,960 |
| District of Columbia | 3,923 | 10 | 3,913 |
| Florida | 77,253 | 211 | 77,042 |
| Georgia | 30,768 | 250 | 30,518 |
| Hawaii | 1,378 | 19 | 1,359 |
| Idaho | 3,537 | 38 | 3,499 |
| Illinois | 42,616 | 192 | 42,424 |
| Indiana | 19,019 | 105 | 18,914 |
| Iowa | 6,283 | 80 | 6,203 |
| Kansas | 6,618 | 39 | 6,579 |
| Kentucky | 25,203 | 78 | 25,125 |
| Louisiana | 29,477 | 110 | 29,367 |
| Maine | 3,196 | 21 | 3,175 |
| Maryland | 14,039 | 43 | 13,996 |
| Massachusetts | 16,646 | 461 | 16,185 |
| Michigan | 35,563 | 121 | 35,442 |
| Minnesota | 9,595 | 70 | 9,525 |
| Mississippi | 21,261 | 58 | 21,203 |
| Missouri | 18,075 | 73 | 18,002 |
| Montana | 1,803 | 12 | 1,791 |
| Nebraska | 3,401 | 24 | 3,377 |
| Nevada | 5,234 | 117 | 5,117 |
| New Hampshire | 1,714 | 16 | 1,698 |
| New Jersey | 20,901 | 65 | 20,836 |
| New Mexico | 6,261 | 38 | 6,223 |
| New York | 68,062 | 161 | 67,901 |
| North Carolina | 33,416 | 160 | 33,256 |
| North Dakota | 940 | 7 | 933 |
| Ohio | 41,422 | 219 | 41,203 |
| Oklahoma | 11,594 | 102 | 11,492 |
| Oregon | 7,505 | 92 | 7,413 |
| Pennsylvania | 50,909 | 173 | 50,736 |
| Rhode Island | 3,757 | 9 | 3,748 |
| South Carolina | 17,718 | 164 | 17,554 |
| South Dakota | 1,879 | 4 | 1,875 |
| Tennessee | 21,915 | 150 | 21,765 |
| Texas | 65,233 | 900 | 64,333 |
| Utah | 3,839 | 35 | 3,804 |
| Vermont | 1,496 | 10 | 1,486 |
| Virginia | 20,290 | 101 | 20,189 |
| Washington | 13,097 | 74 | 13,023 |
| West Virginia | 8,219 | 57 | 8,162 |
| Wisconsin | 15,429 | 69 | 15,360 |
| Wyoming | 817 | a | a |
| Outlying area | | | |
| Northern Mariana Islands | 166 | a | a |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

a. Data not shown to avoid disclosure of information for particular individuals.

CONTACT: Art Kahn (410) 965-0186.

Table 7.B9—Number of federally administered awards, by state or other area, eligibility category, and age, 2003

| State or area | Total | Category | | | Age | | |
|--------------------------|---------|----------|-------|----------|----------|---------|-------------|
| | | Aged | Blind | Disabled | Under 18 | 18–64 | 65 or older |
| All areas | 824,000 | 104,630 | 4,920 | 714,450 | 179,590 | 537,420 | 106,990 |
| Alabama | 18,970 | 1,130 | 50 | 17,790 | 4,190 | 13,620 | 1,160 |
| Alaska | 2,050 | 800 | 0 | 1,250 | 200 | 1,040 | 810 |
| Arizona | 13,600 | 1,100 | 40 | 12,460 | 2,790 | 9,700 | 1,110 |
| Arkansas | 12,180 | 560 | 20 | 11,600 | 3,120 | 8,500 | 560 |
| California | 112,560 | 29,850 | 1,160 | 81,550 | 16,590 | 65,520 | 30,450 |
| Colorado | 7,000 | 860 | 40 | 6,100 | 1,350 | 4,760 | 890 |
| Connecticut | 6,490 | 790 | 50 | 5,650 | 1,000 | 4,660 | 830 |
| Delaware | 2,130 | 180 | 0 | 1,950 | 380 | 1,570 | 180 |
| District of Columbia | 2,620 | 240 | 0 | 2,380 | 690 | 1,690 | 240 |
| Florida | 54,740 | 8,540 | 280 | 45,920 | 14,330 | 31,650 | 8,760 |
| Georgia | 24,610 | 2,270 | 150 | 22,190 | 5,120 | 17,150 | 2,340 |
| Hawaii | 2,630 | 740 | 0 | 1,890 | 200 | 1,690 | 740 |
| Idaho | 3,360 | 160 | 20 | 3,180 | 1,080 | 2,120 | 160 |
| Illinois | 29,790 | 2,490 | 240 | 27,060 | 8,250 | 19,020 | 2,520 |
| Indiana | 14,800 | 550 | 50 | 14,210 | 4,030 | 10,200 | 580 |
| Iowa | 5,100 | 410 | 50 | 4,640 | 1,150 | 3,520 | 430 |
| Kansas | 5,680 | 370 | 10 | 5,300 | 1,310 | 4,000 | 370 |
| Kentucky | 20,390 | 1,260 | 20 | 19,110 | 4,870 | 14,260 | 1,260 |
| Louisiana | 19,420 | 1,460 | 50 | 17,910 | 5,440 | 12,520 | 1,460 |
| Maine | 4,090 | 280 | 20 | 3,790 | 650 | 3,160 | 280 |
| Maryland | 11,960 | 1,290 | 50 | 10,620 | 2,350 | 8,300 | 1,310 |
| Massachusetts | 18,780 | 2,620 | 160 | 16,000 | 2,970 | 13,140 | 2,670 |
| Michigan | 24,760 | 1,580 | 170 | 23,010 | 5,960 | 17,200 | 1,600 |
| Minnesota | 9,380 | 870 | 70 | 8,440 | 2,370 | 6,150 | 860 |
| Mississippi | 13,200 | 900 | 50 | 12,250 | 3,450 | 8,850 | 900 |
| Missouri | 15,140 | 830 | 60 | 14,250 | 3,030 | 11,270 | 840 |
| Montana | 1,810 | 150 | 10 | 1,650 | 370 | 1,290 | 150 |
| Nebraska | 3,360 | 240 | 10 | 3,110 | 640 | 2,480 | 240 |
| Nevada | 5,910 | 920 | 90 | 4,900 | 1,110 | 3,870 | 930 |
| New Hampshire | 2,300 | 90 | 20 | 2,190 | 300 | 1,910 | 90 |
| New Jersey | 19,400 | 3,320 | 80 | 16,000 | 4,470 | 11,570 | 3,360 |
| New Mexico | 5,890 | 560 | 20 | 5,310 | 1,270 | 4,010 | 610 |
| New York | 54,410 | 11,030 | 110 | 43,270 | 10,790 | 32,180 | 11,440 |
| North Carolina | 27,540 | 2,310 | 130 | 25,100 | 6,400 | 18,760 | 2,380 |
| North Dakota | 970 | 70 | 0 | 900 | 150 | 750 | 70 |
| Ohio | 27,390 | 1,630 | 150 | 25,610 | 7,060 | 18,680 | 1,650 |
| Oklahoma | 9,910 | 770 | 90 | 9,050 | 2,210 | 6,910 | 790 |
| Oregon | 7,600 | 680 | 60 | 6,860 | 1,320 | 5,600 | 680 |
| Pennsylvania | 39,580 | 3,670 | 130 | 35,780 | 10,760 | 25,100 | 3,720 |
| Rhode Island | 3,380 | 470 | 10 | 2,900 | 780 | 2,120 | 480 |
| South Carolina | 12,990 | 880 | 110 | 12,000 | 3,100 | 8,980 | 910 |
| South Dakota | 1,310 | 200 | 10 | 1,100 | 290 | 820 | 200 |
| Tennessee | 18,990 | 1,360 | 140 | 17,490 | 3,510 | 14,060 | 1,420 |
| Texas | 69,280 | 9,490 | 700 | 59,090 | 16,040 | 43,490 | 9,750 |
| Utah | 2,930 | 220 | 20 | 2,690 | 940 | 1,770 | 220 |
| Vermont | 1,560 | 100 | 0 | 1,460 | 340 | 1,120 | 100 |
| Virginia | 17,190 | 1,720 | 80 | 15,390 | 3,770 | 11,650 | 1,770 |
| Washington | 14,930 | 1,310 | 70 | 13,550 | 2,690 | 10,850 | 1,390 |
| West Virginia | 8,160 | 440 | 10 | 7,710 | 1,650 | 6,070 | 440 |
| Wisconsin | 10,820 | 770 | 40 | 10,010 | 2,520 | 7,510 | 790 |
| Wyoming | 820 | 60 | 20 | 740 | 210 | 550 | 60 |
| Outlying area | | | | | | | |
| Northern Mariana Islands | 130 | 40 | 0 | 90 | 30 | 60 | 40 |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 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 monthly payment and eligibility category, December 2003

| Monthly payment (dollars) | All recipients | Adults | | | Blind and disabled, under age 18 |
|---------------------------|----------------|---------|--------|-----------|-------------------------------------|
| | | Aged | Blind | Disabled | |
| Total | | | | | |
| Number | 6,094,738 | 900,313 | 60,704 | 4,177,458 | 956,263 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Less than 50.00 | 8.6 | 14.3 | 8.9 | 8.8 | 2.5 |
| 50.00–99.99 | 6.3 | 10.9 | 6.1 | 6.4 | 1.3 |
| 100.00–149.99 | 5.2 | 9.8 | 5.0 | 5.0 | 1.6 |
| 150.00–199.99 | 4.3 | 8.1 | 4.3 | 4.1 | 1.8 |
| 200.00–249.99 | 4.1 | 6.0 | 4.8 | 4.1 | 2.1 |
| 250.00–299.99 | 3.2 | 4.9 | 3.2 | 3.0 | 2.3 |
| 300.00–349.99 | 2.9 | 3.6 | 3.0 | 2.7 | 2.9 |
| 350.00–399.99 | 7.0 | 10.4 | 8.3 | 6.2 | 7.0 |
| 400.00–449.99 | 2.2 | 1.7 | 1.9 | 1.7 | 4.9 |
| 450.00–499.99 | 2.1 | 1.2 | 1.5 | 1.5 | 5.6 |
| 500.00–551.99 | 2.1 | 0.8 | 1.3 | 1.4 | 5.8 |
| 552.00 ^a | 52.2 | 28.3 | 51.6 | 55.1 | 62.2 |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

a. Individuals living in their own household with no countable income were eligible for a federal SSI payment of \$552 in calendar year 2003.

CONTACT: Art Kahn (410) 965-0186.

Table 7.C2—Number and percentage distribution of couples receiving federal SSI payments, by monthly payment and eligibility category, December 2003

| Monthly payment (dollars) | All recipients | Aged | Blind | Disabled |
|---------------------------|----------------|---------|-------|----------|
| Total | | | | |
| Number | 260,123 | 120,234 | 2,667 | 137,222 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 |
| Less than 50.00 | 4.0 | 4.3 | 3.0 | 3.7 |
| 50.00–99.99 | 4.5 | 4.6 | 3.5 | 4.4 |
| 100.00–149.99 | 4.6 | 4.6 | 4.1 | 4.6 |
| 150.00–199.99 | 4.6 | 4.5 | 3.6 | 4.7 |
| 200.00–249.99 | 4.3 | 4.1 | 4.2 | 4.5 |
| 250.00–299.99 | 4.0 | 3.4 | 3.5 | 4.7 |
| 300.00–349.99 | 3.9 | 2.9 | 3.8 | 4.7 |
| 350.00–399.99 | 3.4 | 2.5 | 4.2 | 4.2 |
| 400.00–449.99 | 2.5 | 2.3 | 2.6 | 2.8 |
| 450.00–499.99 | 2.2 | 2.1 | 2.2 | 2.3 |
| 500.00–549.99 | 2.0 | 1.8 | 2.2 | 2.2 |
| 550.00–599.99 | 5.9 | 9.5 | 3.8 | 2.8 |
| 600.00–649.99 | 1.5 | 1.3 | 1.6 | 1.7 |
| 650.00–699.99 | 1.2 | 1.0 | 1.5 | 1.3 |
| 700.00–749.99 | 1.0 | 1.1 | 1.3 | 1.0 |
| 750.00–799.99 | 1.1 | 1.5 | 1.1 | 0.7 |
| 800.00–828.99 | 0.6 | 0.7 | 0.6 | 0.5 |
| 829.00 ^a | 48.6 | 47.8 | 53.2 | 49.2 |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

a. Couples living in their own household with no countable income were eligible for a federal SSI payment of \$829 in calendar year 2003.

CONTACT: Art Kahn (410) 965-0186.

Table 7.D1—Persons receiving federally administered payments and other income and their average monthly income, by type of income, eligibility category, and age, December 2003

| Type of income | Total | Category | | | Age | | |
|---------------------------------|-----------|-----------|--------|-----------|----------|-----------|--------------------------|
| | | Aged | Blind | Disabled | Under 18 | 18–64 | 65 or older ^a |
| Number | 6,902,364 | 1,232,778 | 77,082 | 5,592,504 | 959,379 | 3,953,248 | 1,989,737 |
| Number | | | | | | | |
| With unearned income | | | | | | | |
| Social Security benefits | 2,421,362 | 708,499 | 26,891 | 1,685,972 | 67,351 | 1,212,446 | 1,141,565 |
| Other | 809,910 | 231,350 | 8,488 | 570,072 | 179,258 | 323,883 | 306,769 |
| With earned income | 271,957 | 17,541 | 4,942 | 249,474 | 3,120 | 241,341 | 27,496 |
| Percentage | | | | | | | |
| With unearned income | | | | | | | |
| Social Security benefits | 35.1 | 57.5 | 34.9 | 30.1 | 7.0 | 30.7 | 57.4 |
| Other | 11.7 | 18.8 | 11.0 | 10.2 | 18.7 | 8.2 | 15.4 |
| With earned income | 3.9 | 1.4 | 6.4 | 4.5 | 0.3 | 6.1 | 1.4 |
| Average income (dollars) | | | | | | | |
| With unearned income | | | | | | | |
| Social Security benefits | 422.43 | 419.73 | 438.68 | 423.31 | 189.75 | 440.37 | 417.11 |
| Other | 130.22 | 103.05 | 115.11 | 141.47 | 188.15 | 124.30 | 102.62 |
| With earned income | 309.74 | 325.95 | 556.18 | 303.72 | 336.40 | 314.97 | 260.80 |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: See section SSI: History of Provisions for discussion of income.

a. Includes approximately 17,400 blind and 739,500 disabled persons aged 65 or older.

CONTACT: Art Kahn (410) 965-0186.

7.D SSI: Other Income Sources

Table 7.D2—Percentage of persons receiving both federally administered payments and Social Security benefits, average monthly amount of benefits, by state or other area, eligibility category, and age, December 2003

| State or area | Percentage with Social Security benefits | | | | | | | Average monthly Social Security benefit (dollars) | | | | | | |
|--------------------------|--|----------|-------|----------|----------|-------|-------------|---|----------|--------|----------|----------|--------|-------------|
| | Total | Category | | | Age | | | Total | Category | | | Age | | |
| | | Aged | Blind | Disabled | Under 18 | 18–64 | 65 or older | | Aged | Blind | Disabled | Under 18 | 18–64 | 65 or older |
| All areas | 35.1 | 57.5 | 34.9 | 30.1 | 7.0 | 30.7 | 57.4 | 422.43 | 419.73 | 438.68 | 423.31 | 189.75 | 440.37 | 417.11 |
| Alabama | 40.9 | 87.0 | 43.0 | 34.1 | 9.2 | 34.6 | 79.3 | 406.77 | 414.50 | 395.35 | 403.95 | 184.43 | 423.42 | 406.62 |
| Alaska | 34.7 | 61.2 | 40.2 | 27.5 | 7.1 | 28.2 | 58.4 | 395.42 | 393.56 | 402.13 | 396.40 | 180.92 | 411.04 | 388.27 |
| Arizona | 32.6 | 59.5 | 29.7 | 28.0 | 7.3 | 28.8 | 58.7 | 388.29 | 372.71 | 371.38 | 394.14 | 188.10 | 418.99 | 369.68 |
| Arkansas | 43.2 | 89.6 | 39.1 | 36.3 | 9.1 | 37.4 | 82.6 | 410.06 | 422.57 | 389.94 | 405.68 | 184.79 | 424.25 | 412.74 |
| California | 37.3 | 47.5 | 36.4 | 32.9 | 5.2 | 32.8 | 48.4 | 481.96 | 450.78 | 518.05 | 500.44 | 230.44 | 518.68 | 458.84 |
| Colorado | 36.2 | 55.2 | 31.9 | 32.6 | 6.1 | 33.5 | 57.4 | 410.92 | 406.77 | 407.81 | 412.29 | 194.62 | 423.22 | 404.27 |
| Connecticut | 30.3 | 44.1 | 26.9 | 28.1 | 8.1 | 28.0 | 47.5 | 395.30 | 381.91 | 385.82 | 398.74 | 180.31 | 415.57 | 382.65 |
| Delaware | 33.3 | 65.2 | 34.8 | 29.7 | 7.0 | 33.5 | 64.8 | 412.05 | 419.47 | 383.90 | 410.54 | 177.69 | 429.58 | 415.00 |
| District of Columbia | 25.5 | 65.7 | 24.0 | 20.7 | 6.0 | 19.2 | 59.8 | 403.28 | 396.48 | 427.31 | 405.58 | 218.39 | 430.59 | 395.94 |
| Florida | 33.5 | 51.3 | 32.5 | 28.0 | 7.4 | 31.2 | 51.5 | 393.67 | 387.96 | 393.18 | 396.89 | 191.53 | 419.06 | 388.08 |
| Georgia | 38.9 | 76.0 | 32.4 | 32.4 | 6.7 | 31.9 | 72.2 | 414.76 | 421.07 | 394.66 | 412.40 | 198.27 | 429.03 | 412.71 |
| Hawaii | 31.7 | 42.9 | 33.3 | 26.8 | 6.5 | 25.8 | 44.0 | 429.43 | 401.55 | 481.16 | 448.02 | 169.97 | 468.46 | 403.62 |
| Idaho | 36.2 | 78.9 | 31.0 | 32.3 | 7.8 | 35.0 | 75.1 | 413.20 | 424.65 | 400.20 | 410.72 | 176.32 | 425.58 | 415.85 |
| Illinois | 23.8 | 40.9 | 25.5 | 21.4 | 6.0 | 21.8 | 42.5 | 390.24 | 383.51 | 393.07 | 391.99 | 185.50 | 406.69 | 388.78 |
| Indiana | 32.2 | 73.2 | 33.7 | 29.2 | 7.1 | 32.5 | 68.8 | 400.43 | 412.98 | 391.29 | 398.26 | 174.01 | 411.41 | 409.80 |
| Iowa | 39.4 | 74.6 | 40.5 | 35.7 | 7.4 | 38.3 | 71.6 | 410.70 | 429.96 | 399.47 | 406.83 | 166.04 | 415.29 | 423.24 |
| Kansas | 36.2 | 65.8 | 29.3 | 33.2 | 7.7 | 36.3 | 64.1 | 407.65 | 419.16 | 363.18 | 405.75 | 180.54 | 417.61 | 414.12 |
| Kentucky | 35.3 | 83.5 | 33.5 | 30.6 | 9.3 | 29.3 | 73.6 | 395.11 | 406.89 | 381.62 | 392.11 | 164.18 | 410.19 | 395.70 |
| Louisiana | 35.0 | 81.6 | 36.6 | 28.3 | 7.2 | 27.7 | 74.0 | 393.56 | 404.25 | 388.90 | 389.24 | 195.11 | 405.25 | 397.10 |
| Maine | 43.9 | 87.7 | 37.2 | 39.7 | 14.0 | 38.6 | 81.8 | 415.52 | 435.22 | 403.63 | 411.41 | 146.02 | 424.68 | 424.25 |
| Maryland | 28.9 | 44.9 | 30.9 | 25.6 | 6.3 | 25.9 | 48.0 | 403.90 | 395.33 | 421.32 | 406.83 | 205.91 | 424.13 | 395.73 |
| Massachusetts | 37.3 | 56.5 | 42.5 | 30.0 | 10.0 | 33.2 | 55.8 | 458.16 | 464.25 | 479.32 | 452.84 | 185.60 | 465.48 | 465.67 |
| Michigan | 30.4 | 56.7 | 31.3 | 28.0 | 7.3 | 29.0 | 58.3 | 414.75 | 422.54 | 416.54 | 413.32 | 177.05 | 426.84 | 419.89 |
| Minnesota | 32.0 | 50.9 | 27.1 | 28.9 | 6.9 | 31.2 | 49.7 | 399.78 | 404.01 | 390.18 | 398.64 | 171.16 | 410.98 | 399.71 |
| Mississippi | 41.7 | 89.2 | 42.6 | 34.0 | 8.6 | 33.6 | 80.0 | 400.48 | 409.80 | 390.23 | 396.64 | 184.96 | 417.27 | 400.12 |
| Missouri | 37.1 | 75.9 | 37.8 | 33.2 | 8.1 | 34.5 | 71.3 | 401.63 | 415.65 | 386.92 | 398.50 | 180.97 | 411.29 | 406.35 |
| Montana | 39.4 | 81.0 | 38.6 | 35.5 | 7.4 | 35.9 | 77.0 | 418.62 | 431.81 | 398.80 | 416.05 | 206.28 | 427.15 | 417.37 |
| Nebraska | 39.9 | 72.6 | 36.6 | 36.3 | 7.8 | 39.4 | 69.5 | 412.06 | 426.93 | 389.45 | 409.00 | 186.06 | 418.78 | 419.85 |
| Nevada | 32.9 | 58.5 | 36.7 | 23.8 | 6.1 | 29.1 | 57.8 | 437.56 | 443.67 | 466.70 | 430.80 | 194.73 | 447.41 | 443.43 |
| New Hampshire | 37.2 | 64.8 | 34.5 | 35.0 | 12.7 | 35.9 | 66.7 | 409.61 | 385.33 | 434.52 | 412.89 | 174.80 | 429.48 | 398.03 |
| New Jersey | 31.8 | 42.5 | 32.5 | 28.6 | 6.5 | 29.8 | 45.3 | 419.81 | 404.29 | 419.24 | 426.57 | 208.71 | 444.44 | 407.14 |
| New Mexico | 39.5 | 73.1 | 35.8 | 32.4 | 6.6 | 30.9 | 68.6 | 388.26 | 380.77 | 381.19 | 391.95 | 195.55 | 409.57 | 378.11 |
| New York | 31.5 | 45.1 | 37.7 | 27.7 | 6.0 | 27.2 | 45.6 | 444.61 | 424.20 | 452.67 | 453.70 | 195.01 | 476.58 | 426.12 |
| North Carolina | 42.9 | 83.8 | 36.5 | 35.9 | 8.3 | 36.9 | 77.7 | 406.34 | 416.07 | 393.98 | 402.59 | 189.51 | 423.07 | 404.61 |
| North Dakota | 45.8 | 81.2 | 33.8 | 40.1 | 6.3 | 41.6 | 75.6 | 404.30 | 408.54 | 368.70 | 403.22 | 174.89 | 412.93 | 400.99 |
| Ohio | 27.7 | 60.7 | 31.0 | 25.3 | 6.4 | 26.0 | 59.4 | 391.00 | 401.85 | 382.71 | 389.25 | 173.80 | 400.67 | 398.29 |
| Oklahoma | 36.5 | 79.4 | 32.1 | 30.7 | 6.5 | 30.8 | 73.4 | 400.61 | 412.11 | 388.42 | 396.70 | 184.83 | 409.47 | 403.53 |
| Oregon | 34.7 | 56.8 | 33.9 | 31.3 | 5.9 | 32.9 | 57.5 | 414.87 | 413.63 | 376.65 | 415.76 | 195.11 | 426.18 | 408.91 |
| Pennsylvania | 31.2 | 65.2 | 35.3 | 27.1 | 7.4 | 27.6 | 61.1 | 428.87 | 456.87 | 420.56 | 420.92 | 182.56 | 437.84 | 440.08 |
| Rhode Island | 38.5 | 63.8 | 41.9 | 34.3 | 8.4 | 35.4 | 61.5 | 454.96 | 482.09 | 455.40 | 446.51 | 182.65 | 463.13 | 462.41 |
| South Carolina | 40.2 | 86.0 | 37.7 | 33.2 | 7.5 | 33.2 | 77.7 | 402.85 | 407.08 | 395.18 | 401.31 | 195.38 | 418.49 | 400.94 |
| South Dakota | 41.8 | 71.8 | 33.3 | 36.9 | 6.8 | 39.5 | 67.7 | 399.62 | 429.37 | 406.24 | 389.97 | 185.97 | 403.47 | 406.98 |
| Tennessee | 39.6 | 84.6 | 31.6 | 33.6 | 8.3 | 32.6 | 75.9 | 404.40 | 413.57 | 372.68 | 401.65 | 189.62 | 418.16 | 402.12 |
| Texas | 40.0 | 68.6 | 31.9 | 30.7 | 5.4 | 30.1 | 68.0 | 391.09 | 383.73 | 376.26 | 396.79 | 202.35 | 415.52 | 381.81 |
| Utah | 30.0 | 49.5 | 26.3 | 27.8 | 5.8 | 31.2 | 50.3 | 399.16 | 386.81 | 354.47 | 402.23 | 194.15 | 415.07 | 386.84 |
| Vermont | 47.3 | 85.8 | 55.9 | 42.8 | 10.6 | 43.2 | 80.8 | 445.43 | 462.36 | 405.42 | 442.02 | 147.40 | 454.64 | 451.37 |
| Virginia | 37.4 | 61.1 | 36.1 | 32.6 | 7.9 | 33.4 | 61.9 | 403.50 | 407.76 | 386.90 | 402.12 | 184.11 | 418.03 | 402.60 |
| Washington | 27.1 | 34.0 | 27.8 | 26.1 | 6.2 | 27.3 | 37.8 | 409.13 | 401.07 | 394.65 | 410.87 | 187.39 | 422.30 | 401.04 |
| West Virginia | 32.0 | 82.8 | 31.4 | 28.5 | 9.9 | 26.5 | 69.8 | 395.21 | 416.97 | 396.75 | 390.96 | 168.80 | 403.63 | 402.35 |
| Wisconsin | 35.7 | 68.6 | 32.4 | 32.0 | 6.8 | 34.9 | 65.7 | 408.92 | 419.25 | 398.88 | 406.57 | 177.51 | 417.25 | 416.05 |
| Wyoming | 38.8 | 82.6 | 26.5 | 34.8 | 8.4 | 35.7 | 79.2 | 415.50 | 436.52 | 399.85 | 410.92 | 184.07 | 421.97 | 425.02 |
| Outlying area | | | | | | | | | | | | | | |
| Northern Mariana Islands | 27.3 | 53.7 | 38.5 | 19.9 | 1.8 | 26.2 | 51.6 | 293.11 | 276.57 | 266.00 | 306.37 | 178.33 | 320.35 | 270.50 |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: Art Kahn (410) 965-0186.

Table 7.E2—Percentage distribution of federally administered awards, by sex, age, and eligibility category, 2003

| Sex and age | Total | Adults | | | Blind and disabled children ^a |
|---------------------------------------|---------|---------|-------|--------------|--|
| | | Aged | Blind | Disabled | |
| All persons | | | | | |
| Number | 824,000 | 104,630 | 4,190 | 530,650 | 184,530 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| <i>Percentage distribution by sex</i> | | | | | |
| Male | 51.0 | 37.4 | 55.1 | 49.0 | 64.5 |
| Female | 49.0 | 62.6 | 44.9 | 51.0 | 35.5 |
| <i>Percentage distribution by age</i> | | | | | |
| Under 5 | 8.6 | ... | ... | ... | 38.5 |
| 5–9 | 5.9 | ... | ... | ... | 26.3 |
| 10–14 | 5.4 | ... | ... | ... | 24.3 |
| 15–17 | 1.8 | ... | ... | ... | 8.2 |
| 18–21 | 5.4 | ... | 14.6 | 7.3 | 2.7 |
| 22–29 | 6.0 | ... | 8.6 | 9.3 | ... |
| 30–39 | 11.1 | ... | 14.3 | 17.1 | ... |
| 40–49 | 17.5 | ... | 21.7 | 27.0 | ... |
| 50–59 | 19.7 | ... | 26.7 | 30.4 | ... |
| 60–64 | 5.5 | ... | 8.1 | 8.5 | ... |
| 65–69 | 7.3 | 55.6 | 1.9 | 0.3 | ... |
| 70–74 | 2.6 | 20.0 | 1.2 | ^b | ... |
| 75–79 | 1.5 | 11.9 | 1.7 | ^b | ... |
| 80 or older | 1.6 | 12.5 | 1.2 | ^b | ... |
| Male | | | | | |
| Number | 420,220 | 39,120 | 2,310 | 259,770 | 119,020 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Under 5 | 10.1 | ... | ... | ... | 35.7 |
| 5–9 | 8.2 | ... | ... | ... | 29.0 |
| 10–14 | 7.2 | ... | ... | ... | 25.5 |
| 15–17 | 2.1 | ... | ... | ... | 7.4 |
| 18–21 | 6.0 | ... | 16.5 | 8.4 | 2.4 |
| 22–29 | 6.1 | ... | 9.5 | 9.8 | ... |
| 30–39 | 10.3 | ... | 13.9 | 16.5 | ... |
| 40–49 | 17.0 | ... | 23.4 | 27.2 | ... |
| 50–59 | 18.4 | ... | 26.0 | 29.5 | ... |
| 60–64 | 5.1 | ... | 7.4 | 8.2 | ... |
| 65–69 | 5.6 | 58.4 | 1.3 | 0.3 | ... |
| 70–74 | 2.0 | 21.5 | 0.9 | ^b | ... |
| 75–79 | 1.1 | 11.9 | 0.4 | ^b | ... |
| 80 or older | 0.8 | 8.2 | 0.9 | ^b | ... |
| Female | | | | | |
| Number | 403,780 | 65,510 | 1,880 | 270,880 | 65,510 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Under 5 | 7.1 | ... | ... | ... | 43.5 |
| 5–9 | 3.5 | ... | ... | ... | 21.5 |
| 10–14 | 3.6 | ... | ... | ... | 22.1 |
| 15–17 | 1.6 | ... | ... | ... | 9.7 |
| 18–21 | 4.8 | ... | 12.2 | 6.3 | 3.3 |
| 22–29 | 5.9 | ... | 7.4 | 8.7 | ... |
| 30–39 | 11.9 | ... | 14.9 | 17.7 | ... |
| 40–49 | 18.1 | ... | 19.7 | 26.8 | ... |
| 50–59 | 21.1 | ... | 27.7 | 31.2 | ... |
| 60–64 | 5.9 | ... | 9.0 | 9.3 | ... |
| 65–69 | 9.0 | 53.9 | 2.7 | 0.5 | ... |
| 70–74 | 3.1 | 19.1 | 1.6 | 0.1 | ... |
| 75–79 | 2.0 | 11.9 | 3.2 | ^b | ... |
| 80 or older | 2.5 | 15.1 | 1.6 | ^b | ... |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 10 percent sample.

NOTE: ... = not applicable.

a. Includes students aged 18–21.

b. Less than 0.05 percent.

CONTACT: Clark Pickett (410) 965-9016.

7.E SSI: Recipient Characteristics

Table 7.E3—Number and percentage distribution of recipients of federally administered payments, by sex, age, and eligibility category, December 2003

| Sex and age | All recipients | Adults | | | Blind and disabled, under age 18 |
|---------------------------------------|----------------|-----------|--------|-----------|-------------------------------------|
| | | Aged | Blind | Disabled | |
| All persons | | | | | |
| Number | 6,902,364 | 1,232,778 | 70,323 | 4,639,884 | 959,379 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| <i>Percentage distribution by sex</i> | | | | | |
| Male | 42.4 | 30.3 | 43.7 | 41.0 | 64.7 |
| Female | 57.6 | 69.7 | 56.3 | 59.0 | 35.3 |
| <i>Percentage distribution by age</i> | | | | | |
| Under 5 | 2.2 | ... | ... | ... | 16.2 |
| 5-9 | 3.7 | ... | ... | ... | 26.7 |
| 10-14 | 5.1 | ... | ... | ... | 36.7 |
| 15-17 | 2.8 | ... | ... | ... | 20.4 |
| 18-21 | 3.7 | ... | 6.1 | 5.4 | ... |
| 22-29 | 6.8 | ... | 11.7 | 10.0 | ... |
| 30-39 | 10.1 | ... | 14.6 | 14.8 | ... |
| 40-49 | 14.9 | ... | 17.1 | 21.8 | ... |
| 50-59 | 14.9 | ... | 17.6 | 21.9 | ... |
| 60-64 | 6.9 | ... | 8.1 | 10.1 | ... |
| 65-69 | 7.5 | 15.2 | 6.8 | 7.0 | ... |
| 70-74 | 7.1 | 23.0 | 6.0 | 4.4 | ... |
| 75-79 | 6.2 | 25.2 | 5.0 | 2.4 | ... |
| 80 or older | 8.0 | 36.6 | 7.0 | 2.0 | ... |
| Male | | | | | |
| Number | 2,926,827 | 374,002 | 30,705 | 1,901,841 | 620,279 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Under 5 | 3.1 | ... | ... | ... | 14.5 |
| 5-9 | 5.8 | ... | ... | ... | 27.5 |
| 10-14 | 8.0 | ... | ... | ... | 38.0 |
| 15-17 | 4.2 | ... | ... | ... | 20.0 |
| 18-21 | 5.1 | ... | 7.5 | 7.7 | ... |
| 22-29 | 8.5 | ... | 14.0 | 12.8 | ... |
| 30-39 | 11.0 | ... | 17.4 | 16.7 | ... |
| 40-49 | 15.0 | ... | 18.9 | 22.8 | ... |
| 50-59 | 13.2 | ... | 17.1 | 20.1 | ... |
| 60-64 | 5.8 | ... | 7.4 | 8.9 | ... |
| 65-69 | 6.1 | 18.3 | 5.9 | 5.6 | ... |
| 70-74 | 5.5 | 26.5 | 4.6 | 3.1 | ... |
| 75-79 | 4.3 | 26.0 | 3.4 | 1.4 | ... |
| 80 or older | 4.3 | 29.2 | 3.9 | 0.8 | ... |
| Female | | | | | |
| Number | 3,975,537 | 858,776 | 39,618 | 2,738,043 | 339,100 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Under 5 | 1.6 | ... | ... | ... | 19.2 |
| 5-9 | 2.2 | ... | ... | ... | 25.3 |
| 10-14 | 2.9 | ... | ... | ... | 34.4 |
| 15-17 | 1.8 | ... | ... | ... | 21.0 |
| 18-21 | 2.7 | ... | 5.0 | 3.9 | ... |
| 22-29 | 5.6 | ... | 9.9 | 8.0 | ... |
| 30-39 | 9.4 | ... | 12.5 | 13.5 | ... |
| 40-49 | 14.7 | ... | 15.6 | 21.2 | ... |
| 50-59 | 16.1 | ... | 18.0 | 23.1 | ... |
| 60-64 | 7.7 | ... | 8.7 | 11.0 | ... |
| 65-69 | 8.6 | 13.9 | 7.6 | 8.0 | ... |
| 70-74 | 8.4 | 21.5 | 7.1 | 5.3 | ... |
| 75-79 | 7.6 | 24.8 | 6.2 | 3.2 | ... |
| 80 or older | 10.7 | 39.8 | 9.4 | 2.9 | ... |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 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 2003

| Category and age | Number | | | Percentage distribution | | |
|------------------|-----------|---------------------------|------------------------------|-------------------------|---------------------------|------------------------------|
| | Total | With representative payee | Without representative payee | Total | With representative payee | Without representative payee |
| Total | 6,902,364 | 2,425,455 | 4,476,909 | 100.0 | 35.1 | 64.9 |
| Category | | | | | | |
| Aged | 1,232,778 | 45,981 | 1,186,797 | 100.0 | 3.7 | 96.3 |
| Blind | 77,082 | 19,286 | 57,796 | 100.0 | 25.0 | 75.0 |
| Disabled | 5,592,504 | 2,360,188 | 3,232,316 | 100.0 | 42.2 | 57.8 |
| Age | | | | | | |
| Under 18 | 959,379 | 958,482 | 897 | 100.0 | 99.9 | 0.1 |
| 18–64 | 3,953,248 | 1,313,040 | 2,640,208 | 100.0 | 33.2 | 66.8 |
| 65 or older | 1,989,737 | 153,933 | 1,835,804 | 100.0 | 7.7 | 92.3 |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: Arthur Kahn (410) 965-0186.

Table 7.E5—Number and percentage distribution of persons receiving federally administered payments, by living arrangement, eligibility category, and age, December 2003

| Living arrangement ^a | Number | Category | | | Age | | |
|--|-----------|-----------|--------------------|-----------------------|----------|-----------|-------------|
| | | Aged | Blind ^b | Disabled ^c | Under 18 | 18–64 | 65 or older |
| Total | | | | | | | |
| Number | 6,902,364 | 1,232,778 | 77,082 | 5,592,504 | 959,379 | 3,953,248 | 1,989,737 |
| Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Own household | 94.0 | 90.9 | 92.2 | 94.6 | 95.5 | 94.4 | 92.2 |
| Another's household | 4.1 | 7.3 | 5.3 | 3.3 | 3.2 | 3.8 | 5.1 |
| Institutional care covered by Medicaid | 2.0 | 1.8 | 2.5 | 2.1 | 1.4 | 1.9 | 2.6 |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

- a. As defined for determination of federal SSI payment standards.
b. Includes 17,400 persons aged 65 or older.
c. Includes 739,500 persons aged 65 or older.

CONTACT: Arthur Kahn (410) 965-0186.

Table 7.E6—Number of noncitizens receiving federally administered payments as a percentage of SSI recipients, by eligibility category, December 1982–2003, selected years

| Year | All noncitizens | | Aged | | Blind and disabled | |
|------|-----------------|-------------------------|---------|-------------------------|--------------------|-------------------------|
| | Number | Percentage of total SSI | Number | Percentage of total SSI | Number | Percentage of total SSI |
| 1982 | 127,900 | 3.3 | 91,900 | 5.9 | 36,000 | 1.6 |
| 1985 | 210,800 | 5.1 | 146,500 | 9.7 | 64,300 | 2.4 |
| 1990 | 435,600 | 9.0 | 282,400 | 19.4 | 153,200 | 4.6 |
| 1991 | 519,660 | 10.2 | 329,690 | 22.5 | 189,970 | 5.2 |
| 1992 | 601,430 | 10.8 | 372,930 | 25.4 | 228,500 | 5.6 |
| 1993 | 683,150 | 11.4 | 416,420 | 28.2 | 266,730 | 5.9 |
| 1994 | 738,140 | 11.7 | 440,000 | 30.0 | 298,140 | 6.2 |
| 1995 | 785,410 | 12.1 | 459,220 | 31.8 | 326,190 | 6.3 |
| 1996 | 724,990 | 11.0 | 417,360 | 29.5 | 307,630 | 5.9 |
| 1997 | 650,830 | 10.0 | 367,200 | 27.0 | 283,630 | 5.5 |
| 1998 | 669,630 | 10.2 | 364,980 | 27.4 | 304,650 | 5.8 |
| 1999 | 684,930 | 10.4 | 368,330 | 28.2 | 316,600 | 6.0 |
| 2000 | 692,590 | 10.5 | 364,470 | 28.3 | 328,120 | 6.2 |
| 2001 | 695,650 | 10.4 | 364,550 | 28.9 | 331,100 | 6.1 |
| 2002 | 703,515 | 10.4 | 364,827 | 29.1 | 338,688 | 6.1 |
| 2003 | 696,772 | 10.1 | 356,298 | 28.9 | 340,474 | 6.0 |

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: Paul S. Davies (410) 966-0299.

Section 8. Health Care Programs

Medicare

| | |
|---|------|
| Trust Funds | 8.1 |
| Enrollment, Utilization, and Reimbursement | 8.5 |
| Participating Facilities | 8.26 |

Medicaid

| | |
|------------|------|
| Recipients | 8.32 |
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Table 8.A1—Hospital Insurance, calendar years 1966–2003 (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 ^a | Total | Benefit payments ^b | Administrative expenses | | |
| | | | | | Uninsured persons | Military wage credits | | | | | Amount ^c | 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 | ^d 803 | 141 | 9 | 746 | 13,679 | 13,340 | 339 | 2.5 | 10,605 |
| 1977 | 15,856 | 14,114 | ... | ^e 214 | ^d 803 | ^f 143 | 12 | 784 | 16,019 | 15,737 | 283 | 1.8 | 10,442 |
| 1978 | 19,213 | 17,324 | ... | ^e 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 | ^g 8,164 |
| 1983 | 44,570 | 37,259 | ... | 358 | 878 | ^h 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 | ⁱ -719 | 41 | 3,362 | 48,414 | 47,580 | 834 | 1.8 | ^g 20,499 |
| 1986 | 59,267 | 54,583 | ... | 364 | 566 | 91 | 43 | 3,619 | 50,422 | 49,758 | 664 | 1.3 | ^g 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 | ^j -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 | ^k 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 | ^l -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 | ^m 133,990 | 1,782 | 1.3 | 120,419 |
| 1999 | 151,597 | 132,306 | 6,552 | 430 | 652 | 71 | 1,447 | 10,139 | 130,632 | ^m 128,766 | 1,866 | 1.4 | 141,385 |

(Continued)

8.A Medicare: Trust Funds

Table 8.A1—Hospital Insurance, calendar years 1966–2003 (in millions of dollars)—Continued

| Year | Receipts | | | | | | | | Expenditures | | | | Trust fund assets at end of year |
|------|----------|---------------|----------------------------------|--|---|-----------------------|-----------------------------------|---|--------------|-------------------------------|-------------------------|--------------------------------|----------------------------------|
| | Total | Payroll taxes | Income from taxation of benefits | Transfers from Railroad Retirement account | Reimbursements from general revenues for— | | Premiums from voluntary enrollees | Interest on investments and other income ^a | Total | Benefit payments ^b | Administrative expenses | | |
| | | | | | Uninsured persons | Military wage credits | | | | | Amount ^c | Percentage of benefit payments | |
| 2000 | 167,185 | 144,351 | 8,787 | 465 | 470 | 2 | 1,382 | 11,729 | 131,095 | ^m 128,458 | 2,636 | 2.1 | 177,475 |
| 2001 | 174,630 | 151,994 | 7,533 | 470 | 453 | ⁿ -1,175 | 1,370 | 13,986 | 143,379 | ^m 141,183 | 2,195 | 1.6 | 208,726 |
| 2002 | 178,631 | 152,708 | 8,316 | 425 | 442 | 0 | 1,626 | 15,114 | 152,526 | ^m 149,944 | 2,582 | 1.7 | 234,831 |
| 2003 | 175,812 | 149,242 | 8,318 | 426 | 393 | 0 | 1,604 | 15,828 | 154,616 | ^m 152,084 | 2,533 | 1.7 | 256,026 |

SOURCE: 2004 Annual Report of the Board of Trustees of the Federal Hospital Insurance Trust Fund, Table II.B5, and analogous tables from earlier annual reports.

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

Because the table published in the 2004 Annual Report displays dollars rounded to the tenths of billions, an analogous unpublished table displaying dollars rounded to the millions was also used.

. . . = not applicable.

- a. Other income includes recoveries of amounts reimbursed from the trust fund that are not obligations of the trust fund, receipts from the fraud and abuse control program (beginning in 1997), and a small amount of miscellaneous income.
- b. Includes costs of Peer Review Organizations from 1983 to 2001 (beginning with the implementation of the Prospective Payment System on October 1, 1983) and costs of Quality Improvement Organizations beginning in 2002.
- c. Includes costs of experiments and demonstration projects. Beginning in 1997, includes fraud and abuse control expenses, as provided for by Public Law (P.L.) 104-91.
- 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 reimbursement from general revenues for costs arising from the granting of deemed wage credits to persons of Japanese ancestry who were interned during World War II.
- 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 for by section 151 of P.L. 98-21.

CONTACT: John Wandishin (410) 786-6389.

Table 8.A2—Supplementary Medical Insurance, calendar years 1966–2003 (in millions of dollars)

| Year | Receipts | | | | | | Expenditures | | | | Trust fund assets at end of year ^a |
|------|---------------------|----------------------------|---------------------|--------------------|---------------------------------------|--|---------------------|-------------------------------|-------------------------|--------------------------------|---|
| | Total | Premiums from participants | | | Government contributions ^b | Interest and other income ^c | Total | Benefit payments ^d | Administrative expenses | | |
| | | Subtotal | 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 | 299 | 7,755 | 7,252 | 503 | 6.9 | 4,400 |
| 1979 | 9,768 | 2,719 | 2,451 | 267 | 6,645 | 404 | 9,265 | 8,708 | 557 | 6.4 | 4,902 |
| 1980 | 10,874 | 3,011 | 2,707 | 304 | 7,455 | 408 | 11,245 | 10,635 | 610 | 5.7 | 4,530 |
| 1981 | 15,374 | ^e 3,722 | ^e 3,356 | ^e 366 | ^e 11,291 | 361 | 14,028 | 13,113 | 915 | 7.0 | 5,877 |
| 1982 | 16,580 | ^e 3,697 | ^e 3,341 | ^e 356 | ^e 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 | ^f 7,409 | ^f 6,747 | ^f 661 | ^f 23,560 | 876 | 31,740 | 30,820 | 921 | 3.0 | 8,394 |
| 1988 | 35,825 | ^f 8,761 | ^f 7,983 | ^f 778 | ^f 26,203 | 861 | 35,229 | 33,970 | 1,260 | 3.7 | 8,990 |
| 1989 | ^g 44,349 | ^{g,h} 12,263 | 9,793 | 993 | 30,852 | ^g 1,234 | ^g 39,783 | 38,294 | ^g 1,489 | 3.9 | ^g 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 | ⁱ 14,077 | ⁱ 12,814 | ⁱ 1,263 | ⁱ 41,359 | 1,801 | 50,830 | 49,260 | 1,570 | 3.2 | 24,235 |
| 1993 | 57,679 | ⁱ 14,193 | ⁱ 12,731 | ⁱ 1,462 | ⁱ 41,465 | 2,021 | 57,783 | ⁱ 55,784 | 2,000 | 3.6 | 24,131 |
| 1994 | 55,608 | 17,386 | 15,569 | 1,817 | 36,203 | 2,018 | 60,317 | 58,618 | 1,699 | 2.9 | 19,422 |
| 1995 | 60,306 | 19,717 | 17,651 | 2,066 | 39,007 | 1,582 | 66,599 | 64,972 | 1,627 | 2.5 | 13,130 |
| 1996 | 85,609 | 18,763 | 16,654 | 2,109 | 65,035 | 1,811 | 70,408 | 68,598 | 1,810 | 2.6 | 28,332 |
| 1997 | 81,924 | 19,289 | 17,079 | 2,210 | 60,171 | 2,464 | 74,124 | 72,757 | 1,368 | 1.9 | 36,131 |
| 1998 | 87,711 | ^k 20,933 | ^k 18,594 | ^k 2,338 | ^k 64,068 | 2,711 | 77,630 | ^l 76,125 | 1,505 | 2.0 | 46,212 |
| 1999 | 80,902 | ^k 18,967 | ^k 16,604 | ^k 2,362 | ^k 59,095 | 2,841 | 82,327 | ^l 80,724 | 1,603 | 2.0 | 44,787 |

(Continued)

8.A Medicare: Trust Funds

Table 8.A2—Supplementary Medical Insurance, calendar years 1966–2003 (in millions of dollars)—Continued

| Year | Receipts | | | | | | Expenditures | | | | Trust fund assets at end of year ^a |
|------|----------|----------------------------|--------|----------|---------------------------------------|--|--------------|-------------------------------|-------------------------|--------------------------------|---|
| | Total | Premiums from participants | | | Government contributions ^b | Interest and other income ^c | Total | Benefit payments ^d | Administrative expenses | | |
| | | Subtotal | Aged | Disabled | | | | | Amount | Percentage of benefit payments | |
| 2000 | 89,903 | 20,555 | 17,892 | 2,664 | ^k 65,898 | 3,450 | 90,663 | ^l 88,893 | 1,770 | 2.0 | 44,027 |
| 2001 | 98,629 | 22,764 | 19,905 | 2,859 | 72,793 | 3,071 | 101,386 | ^l 99,663 | 1,723 | 1.7 | 41,270 |
| 2002 | 106,196 | 25,066 | 21,610 | 3,456 | 78,338 | 2,792 | 113,165 | ^l 110,969 | 2,196 | 2.0 | 34,301 |
| 2003 | 115,796 | 27,402 | 23,546 | 3,856 | 86,402 | 1,992 | 126,144 | ^l 123,825 | 2,318 | 1.9 | 23,953 |

SOURCES: 2004 Annual Report of the Board of Trustees of the Federal Supplementary Medical Insurance Fund, Table II.C9, analogous tables from earlier annual reports, and unpublished Treasury reports.

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

Because the table published in the 2004 Annual Report displays dollars rounded to the tenths of billions, an analogous unpublished table displaying dollars rounded to the millions was also used.

. . . = not applicable; SMI = Supplementary Medical Insurance.

- 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. Includes costs of Peer Review Organizations from 1983 through 2001 and costs of Quality Improvement Organizations beginning in 2002.
- e. Section 708 of Title VII of the Social Security Act modified the provisions for the delivery of Social Security benefit checks when the regularly designated delivery day falls on a Saturday, Sunday, or legal public holiday. Delivery of benefit checks normally due January 1982 occurred on December 31, 1981. Consequently, the SMI premiums withheld from the checks (\$264 million) and the associated general revenue contributions (\$883 million) were added to the SMI trust fund on December 31, 1981. These amounts are excluded from the premium income and general revenue income for calendar year 1982.
- f. Delivery of benefit checks normally due January 1988 occurred on December 31, 1987. Consequently, the SMI premiums withheld from the checks (\$692 million) and the associated general revenue contributions (\$2,178 million) were added to the SMI trust fund on December 31, 1987. These amounts are excluded from the premium income and general revenue income for calendar year 1988; see footnote e.
- g. Includes the impact of the Medicare Catastrophic Coverage Act of 1988 as provided for by Public Law (P.L.) 100-360.
- h. Catastrophic coverage premiums—\$1.5 billion—not distributed between aged and disabled enrollees are included in total.
- i. Delivery of benefit checks normally due January 1993 occurred on December 31, 1992. Consequently, the SMI premiums withheld from the checks (\$1,089 million) and the associated general revenue contributions (\$3,175 million) were added to the SMI trust fund on December 31, 1992. These amounts are excluded from the premium income and general revenue income for calendar year 1993; see footnote e.
- j. Includes the impact of the transfer to the Health Insurance (HI) trust fund of the SMI catastrophic coverage reserve fund on March 31, 1993, as specified in P.L. 102-394. Actual benefit payments for 1993 were \$53,979 million, and the amount transferred was \$1,805 million.
- k. Delivery of benefit checks normally due January 1999 occurred on December 31, 1998. Consequently, the SMI premiums withheld from the checks (\$1,512 million) and the associated general revenue contributions (\$4,711 million) were added to the SMI trust fund on December 31, 1998. These amounts are excluded from the premium income and general revenue income for calendar year 1999; see footnote e.
- l. Benefit payments less monies transferred from the HI trust fund for home health agency costs, as provided for by P.L. 105-33.

CONTACT: Sol Mussey (410) 786-6386.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B1—Hospital Insurance and/or Supplementary Medical Insurance: Aged persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1967–1999

| Type of coverage and service | 1967 | 1975 | 1980 | 1990 | 1997 | 1999 |
|--|--------|--------|--------|--------|---------|---------|
| <i>Persons enrolled (fee-for-service and managed care) (thousands)</i> | | | | | | |
| Hospital Insurance and/or Supplementary Medical Insurance | 19,521 | 22,790 | 25,515 | 30,948 | 33,636 | 33,931 |
| Hospital Insurance | 19,494 | 22,472 | 25,104 | 30,464 | 33,230 | 33,519 |
| Supplementary Medical Insurance | 17,893 | 21,945 | 24,680 | 29,685 | 32,171 | 32,412 |
| <i>Persons enrolled (fee-for-service only) (thousands)</i> | | | | | | |
| Hospital Insurance and/or Supplementary Medical Insurance | -- | -- | -- | -- | 28,511 | 27,438 |
| Hospital Insurance | -- | -- | -- | -- | 28,117 | 27,036 |
| Supplementary Medical Insurance | -- | -- | -- | -- | 27,046 | 25,919 |
| <i>Persons served (thousands)</i> | | | | | | |
| Hospital Insurance and/or Supplementary Medical Insurance | 7,154 | 12,032 | 16,271 | 24,809 | 26,130 | 25,274 |
| Hospital Insurance | 3,960 | 4,963 | 6,024 | 6,367 | 7,136 | 6,282 |
| Inpatient hospital | 3,601 | 4,913 | 5,951 | 5,906 | 6,004 | 5,930 |
| Skilled nursing services | 354 | 260 | 248 | 615 | 1,433 | 1,374 |
| Home health services ^a | 126 | 329 | 675 | 1,818 | 3,169 | 1,417 |
| Hospice services ^b | ... | ... | ... | -- | 360 | 450 |
| Supplementary Medical Insurance | 6,523 | 11,762 | 16,099 | 24,687 | 25,943 | 25,048 |
| Physicians' and other medical services | 6,415 | 11,396 | 15,627 | 24,193 | 25,434 | 24,615 |
| Outpatient services | 1,511 | 3,768 | 6,629 | 14,055 | 17,957 | 17,844 |
| Home health services ^a | 118 | 161 | 302 | 38 | 47 | 1,221 |
| <i>Persons served per 1,000 enrollees</i> | | | | | | |
| Hospital Insurance and/or Supplementary Medical Insurance | 367 | 528 | 638 | 802 | 777 | 921 |
| Hospital Insurance | 203 | 221 | 240 | 209 | 215 | 232 |
| Inpatient hospital | 185 | 219 | 237 | 194 | 181 | 219 |
| Skilled nursing services | 18 | 12 | 10 | 21 | 43 | 51 |
| Home health services ^a | 7 | 15 | 27 | 60 | 95 | 52 |
| Hospice services ^b | ... | ... | ... | -- | 11 | 17 |
| Supplementary Medical Insurance | 365 | 536 | 652 | 832 | 807 | 966 |
| Physicians' and other medical services | 359 | 519 | 633 | 815 | 791 | 950 |
| Outpatient services | 77 | 172 | 269 | 474 | 558 | 688 |
| Home health services ^a | 7 | 7 | 12 | 1 | 1 | 47 |
| <i>Amount reimbursed (millions of dollars)</i> | | | | | | |
| Hospital Insurance and/or Supplementary Medical Insurance | 4,239 | 12,689 | 29,134 | 88,778 | 151,655 | 142,425 |
| Hospital Insurance | 2,967 | 9,209 | 20,353 | 54,244 | 100,034 | 85,413 |
| Inpatient hospital | 2,659 | 8,840 | 19,583 | 48,952 | 72,430 | 71,290 |
| Skilled nursing services | 274 | 233 | 331 | 1,886 | 10,708 | 9,191 |
| Home health services ^a | 26 | 136 | 440 | 3,406 | 14,976 | 2,581 |
| Hospice services ^b | ... | ... | ... | -- | 1,920 | 2,351 |
| Supplementary Medical Insurance | 1,272 | 3,481 | 8,871 | 34,533 | 51,621 | 57,012 |
| Physicians' and other medical services | 1,224 | 3,050 | 7,361 | 27,379 | 38,096 | 40,298 |
| Outpatient services | 38 | 374 | 1,261 | 7,077 | 13,307 | 12,181 |
| Home health services ^a | 17 | 56 | 159 | 78 | 218 | 4,532 |
| <i>Amount reimbursed per person served (dollars)</i> | | | | | | |
| Hospital Insurance and/or Supplementary Medical Insurance | 592 | 1,055 | 1,791 | 3,578 | 5,804 | 5,635 |
| Hospital Insurance | 749 | 1,855 | 3,379 | 8,520 | 14,018 | 13,596 |
| Inpatient hospital | 738 | 1,799 | 3,291 | 8,289 | 12,064 | 12,022 |
| Skilled nursing services | 774 | 896 | 1,336 | 3,068 | 7,472 | 6,689 |
| Home health services ^a | 204 | 413 | 652 | 1,874 | 4,726 | 1,821 |
| Hospice services ^b | ... | ... | ... | -- | 5,333 | 5,224 |
| Supplementary Medical Insurance | 195 | 296 | 545 | 1,399 | 1,990 | 2,276 |
| Physicians' and other medical services | 191 | 268 | 471 | 1,132 | 1,498 | 1,637 |
| Outpatient services | 25 | 99 | 190 | 503 | 741 | 683 |
| Home health services ^a | 145 | 347 | 526 | 2,033 | 4,638 | 3,712 |

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B1—Hospital Insurance and/or Supplementary Medical Insurance: Aged persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1967–1999—Continued

| Type of coverage and service | 1967 | 1975 | 1980 | 1990 | 1997 | 1999 |
|---|---|------|-------|-------|-------|-------|
| | <i>Amount reimbursed per enrollee (dollars)</i> | | | | | |
| Hospital Insurance and/or Supplementary Medical Insurance | 217 | 557 | 1,142 | 2,869 | 4,510 | 5,189 |
| Hospital Insurance | 152 | 410 | 811 | 1,781 | 3,010 | 3,158 |
| Inpatient hospital | 137 | 394 | 780 | 1,607 | 2,179 | 2,636 |
| Skilled nursing services | 14 | 11 | 13 | 62 | 322 | 340 |
| Home health services ^a | 1 | 6 | 18 | 112 | 451 | 95 |
| Hospice services ^b | ... | ... | ... | -- | 58 | 87 |
| Supplementary Medical Insurance | 71 | 159 | 356 | 1,163 | 1,605 | 2,199 |
| Physicians' and other medical services | 69 | 139 | 298 | 922 | 1,184 | 1,555 |
| Outpatient services | 2 | 17 | 51 | 238 | 414 | 470 |
| Home health services ^a | 1 | 2 | 6 | 3 | 7 | 175 |

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Measurement of the use of services represents those persons receiving a reimbursed service under the original (or fee-for-service) Medicare plan. Amount reimbursed represents payments recorded on fee-for-service claims only and excludes nonbilling reimbursements, such as end-of-year cost settlements and premiums paid to managed care plans. For all years, total enrollment as of July 1 in the original (or fee-for-service) Medicare program as well as those enrolled in alternative prepaid plans, such as Medicare managed care, are shown. Beginning in 1997, data for the original fee-for-service enrollment population are shown separately, as they provide a more accurate population for denominators for computing persons served per 1,000 enrollees and average fee-for-service reimbursement per enrollee.

... = not applicable; -- = not available.

- a. The Balanced Budget Act of 1997, enacted on August 5, 1997, specified that, effective January 1998, coverage for the majority of home health services not associated with a hospital or skilled nursing facility will be transferred from the Hospital Insurance (HI) program to the Supplementary Medical Insurance (SMI) program. The HI program will cover the first 100 home health agency visits following a hospital or skilled nursing facility stay of at least 3 days. From July 1981 to December 1997, home health agency services were almost exclusively provided by the HI program. For more information, refer to the 1998 HI and SMI trust fund reports.
- b. The hospice care benefit was enacted in 1982. Therefore, for calendar years 1967, 1975, and 1980, hospice services were not applicable.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B2—Hospital Insurance and/or Supplementary Medical Insurance: Disabled persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1974–1999

| Type of coverage and service | 1974 | 1975 | 1980 | 1990 | 1997 | 1998 | 1999 |
|--|-------|-------|-------|--------------|--------|--------|--------|
| <i>Persons enrolled (fee-for-service and managed care) (thousands)</i> | | | | | | | |
| Hospital Insurance and/or Supplementary Medical Insurance | 1,928 | 2,168 | 2,963 | 3,255 | 4,829 | 5,041 | 5,219 |
| Hospital Insurance | 1,928 | 2,168 | 2,963 | 3,255 | 4,829 | 5,040 | 5,219 |
| Supplementary Medical Insurance | 1,745 | 1,959 | 2,719 | 2,943 | 4,307 | 4,486 | 4,642 |
| <i>Persons enrolled (fee-for-service only) (thousands)</i> | | | | | | | |
| Hospital Insurance and/or Supplementary Medical Insurance | -- | -- | -- | -- | 4,498 | 4,617 | 4,741 |
| Hospital Insurance | -- | -- | -- | -- | 4,498 | 4,616 | 4,741 |
| Supplementary Medical Insurance | -- | -- | -- | -- | 3,976 | 4,061 | 4,164 |
| <i>Persons served (thousands)</i> | | | | | | | |
| Hospital Insurance and/or Supplementary Medical Insurance | 792 | 975 | 1,760 | 2,390 | 3,717 | 3,792 | 3,937 |
| Hospital Insurance | 400 | 475 | 728 | 680 | 982 | 952 | 937 |
| Inpatient hospital | 397 | 472 | 721 | 644 | 883 | 891 | 916 |
| Skilled nursing services | 8 | 8 | 9 | 23 | 70 | 73 | 74 |
| Home health services ^a | 15 | 22 | 51 | 122 | 289 | 204 | 126 |
| Hospice services ^b | ... | ... | ... | -- | 20 | 21 | 24 |
| Supplementary Medical Insurance | 740 | 924 | 1,723 | 2,365 | 3,678 | 3,757 | 3,898 |
| Physicians' and other medical services | 691 | 865 | 1,631 | 2,249 | 3,527 | 3,619 | 3,764 |
| Outpatient services | 296 | 399 | 909 | 1,496 | 2,586 | 2,629 | 2,728 |
| Home health services ^a | 9 | 13 | 25 | ^c | 360 | 125 | 127 |
| <i>Persons served per 1,000 enrollees</i> | | | | | | | |
| Hospital Insurance and/or Supplementary Medical Insurance | 411 | 450 | 594 | 734 | 772 | 823 | 831 |
| Hospital Insurance | 208 | 219 | 246 | 209 | 204 | 207 | 198 |
| Inpatient hospital | 206 | 218 | 243 | 198 | 183 | 194 | 193 |
| Skilled nursing services | 4 | 4 | 3 | 7 | 15 | 16 | 16 |
| Home health services ^a | 8 | 10 | 17 | 38 | 60 | 44 | 27 |
| Hospice services ^b | ... | ... | ... | -- | 4 | 5 | 5 |
| Supplementary Medical Insurance | 424 | 471 | 634 | 804 | 856 | 927 | 936 |
| Physicians' and other medical services | 396 | 442 | 600 | 764 | 821 | 892 | 904 |
| Outpatient services | 170 | 204 | 334 | 508 | 602 | 648 | 655 |
| Home health services ^a | 5 | 7 | 9 | ^c | 84 | 31 | 30 |
| <i>Amount reimbursed (millions of dollars)</i> | | | | | | | |
| Hospital Insurance and/or Supplementary Medical Insurance | 1,049 | 1,509 | 4,478 | 11,239 | 23,768 | 23,746 | 24,262 |
| Hospital Insurance | 694 | 987 | 2,765 | 6,694 | 14,293 | 13,529 | 13,434 |
| Inpatient hospital | 681 | 968 | 2,714 | 6,346 | 12,133 | 12,291 | 12,571 |
| Skilled nursing services | 7 | 9 | 13 | 85 | 529 | 582 | 482 |
| Home health services ^a | 6 | 10 | 38 | 264 | 1,512 | 527 | 229 |
| Hospice services ^b | ... | ... | ... | -- | 120 | 129 | 153 |
| Supplementary Medical Insurance | 355 | 522 | 1,713 | 4,545 | 9,475 | 10,217 | 10,828 |
| Physicians' and other medical services | 206 | 295 | 997 | 2,831 | 5,525 | 5,743 | 6,188 |
| Outpatient services | 145 | 221 | 701 | 1,714 | 3,949 | 3,980 | 4,043 |
| Home health services ^a | 3 | 5 | 16 | ^c | 504 | 494 | 597 |
| <i>Amount reimbursed per person served (dollars)</i> | | | | | | | |
| Hospital Insurance and/or Supplementary Medical Insurance | 1,324 | 1,548 | 2,544 | 4,703 | 6,394 | 6,262 | 6,163 |
| Hospital Insurance | 1,735 | 2,077 | 3,798 | 9,847 | 14,555 | 14,211 | 14,337 |
| Inpatient hospital | 1,714 | 2,051 | 3,765 | 9,849 | 13,741 | 13,795 | 13,724 |
| Skilled nursing services | 936 | 1,049 | 1,571 | 3,702 | 7,557 | 7,973 | 6,514 |
| Home health services ^a | 399 | 478 | 733 | 2,156 | 5,232 | 2,583 | 1,817 |
| Hospice services ^b | ... | ... | ... | -- | 6,000 | 6,143 | 6,375 |
| Supplementary Medical Insurance | 479 | 565 | 994 | 1,922 | 2,576 | 2,719 | 2,778 |
| Physicians' and other medical services | 298 | 341 | 611 | 1,259 | 1,566 | 1,587 | 1,644 |
| Outpatient services | 490 | 554 | 771 | 1,146 | 1,527 | 1,514 | 1,482 |
| Home health services ^a | 345 | 420 | 619 | ^c | 1,400 | 3,952 | 4,701 |

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B2—Hospital Insurance and/or Supplementary Medical Insurance: Disabled persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1974–1999—Continued

| Type of coverage and service | 1974 | 1975 | 1980 | 1990 | 1997 | 1998 | 1999 |
|---|------|------|-------|--------------|-------|-------|-------|
| <i>Amount reimbursed per enrollee (dollars)</i> | | | | | | | |
| Hospital Insurance and/or Supplementary Medical Insurance | 544 | 696 | 1,511 | 3,453 | 4,936 | 5,157 | 5,121 |
| Hospital Insurance | 360 | 455 | 933 | 2,057 | 2,968 | 2,939 | 2,835 |
| Inpatient hospital | 353 | 446 | 916 | 1,950 | 2,520 | 2,670 | 2,653 |
| Skilled nursing services | 4 | 4 | 4 | 26 | 110 | 126 | 102 |
| Home health services ^a | 3 | 5 | 13 | 81 | 314 | 114 | 48 |
| Hospice services ^b | ... | ... | ... | -- | 25 | 28 | 32 |
| Supplementary Medical Insurance | 208 | 266 | 630 | 1,544 | 2,206 | 2,520 | 2,600 |
| Physicians' and other medical services | 118 | 151 | 639 | 962 | 1,286 | 1,416 | 1,486 |
| Outpatient services | 83 | 113 | 258 | 582 | 919 | 982 | 971 |
| Home health services ^a | 2 | 3 | 5 | ^c | 117 | 122 | 143 |

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Measurement of the use of services represents those persons receiving a reimbursed service under the original (or fee-for-service) Medicare plan. Amount reimbursed represents payments recorded on fee-for-service claims only and excludes nonbilling reimbursements, such as end-of-year cost settlements and premiums paid to managed care plans. For all years, total enrollment as of July 1 in the original (or fee-for-service) Medicare program as well as those enrolled in alternative prepaid plans, such as Medicare managed care, are shown. Beginning in 1997, data for the original fee-for-service enrollment population are shown separately, as they provide a more accurate population for denominators for computing persons served per 1,000 enrollees and average fee-for-service reimbursement per enrollee.

... = not applicable; -- = not available.

- a. The Balanced Budget Act of 1997, enacted on August 5, 1997, specified that, effective January 1998, coverage for the majority of home health services not associated with a hospital or skilled nursing facility will be transferred from the Hospital Insurance (HI) program to the Supplementary Medical Insurance (SMI) program. The HI program will cover the first 100 home health agency visits following a hospital or skilled nursing facility stay of at least 3 days. From July 1981 to December 1997, home health agency services were almost exclusively provided by the HI program. For more information, refer to the 1998 HI and SMI trust fund reports.
- b. The hospice care benefit was enacted in 1982. Therefore, for calendar years 1974, 1975, and 1980, hospice services were not applicable.
- c. Sample population too small to yield valid calculated results.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3a—Hospital Insurance and/or Supplementary Medical Insurance: Number of enrollees aged 65 or older, by census division and state or other area, July 1, 1980–2003, selected years (in thousands)

| Census division and state or area | 1980 | 1990 | 1995 | 1999 | 2000 | 2001 | 2002 | 2003 |
|-----------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total | | | | | | | | |
| All areas | 25,515 | 30,948 | 33,142 | 33,929 | 34,253 | 34,462 | 34,679 | 35,008 |
| United States ^a | 25,027 | 30,350 | 32,492 | 33,240 | 33,549 | 33,743 | 33,947 | 34,261 |
| New England | 1,506 | 1,734 | 1,816 | 1,829 | 1,838 | 1,837 | 1,836 | 1,841 |
| Connecticut | 362 | 436 | 455 | 456 | 458 | 457 | 456 | 458 |
| Maine | 142 | 165 | 174 | 179 | 180 | 182 | 183 | 185 |
| Massachusetts | 715 | 795 | 825 | 826 | 829 | 827 | 824 | 822 |
| New Hampshire | 103 | 126 | 139 | 145 | 147 | 148 | 150 | 152 |
| Rhode Island | 125 | 145 | 149 | 148 | 148 | 147 | 146 | 146 |
| Vermont | 59 | 68 | 72 | 75 | 76 | 76 | 77 | 78 |
| Middle Atlantic | 4,496 | 5,084 | 5,267 | 5,264 | 5,282 | 5,277 | 5,276 | 5,279 |
| New Jersey | 851 | 1,006 | 1,058 | 1,065 | 1,070 | 1,070 | 1,071 | 1,073 |
| New York | 2,128 | 2,280 | 2,328 | 2,334 | 2,347 | 2,351 | 2,356 | 2,361 |
| Pennsylvania | 1,516 | 1,798 | 1,881 | 1,865 | 1,865 | 1,856 | 1,849 | 1,845 |
| East North Central | 4,462 | 5,224 | 5,500 | 5,526 | 5,552 | 5,560 | 5,567 | 5,599 |
| Illinois | 1,238 | 1,401 | 1,446 | 1,437 | 1,440 | 1,440 | 1,439 | 1,446 |
| Indiana | 579 | 685 | 725 | 732 | 736 | 738 | 740 | 746 |
| Michigan | 916 | 1,101 | 1,177 | 1,194 | 1,203 | 1,207 | 1,210 | 1,218 |
| Ohio | 1,162 | 1,387 | 1,471 | 1,474 | 1,480 | 1,480 | 1,480 | 1,486 |
| Wisconsin | 567 | 650 | 683 | 689 | 693 | 695 | 698 | 703 |
| West North Central | 2,186 | 2,424 | 2,510 | 2,513 | 2,519 | 2,522 | 2,523 | 2,532 |
| Iowa | 387 | 422 | 432 | 427 | 427 | 426 | 425 | 426 |
| Kansas | 304 | 337 | 348 | 347 | 347 | 346 | 345 | 345 |
| Minnesota | 479 | 544 | 570 | 579 | 583 | 586 | 590 | 595 |
| Missouri | 639 | 706 | 733 | 734 | 736 | 737 | 737 | 740 |
| Nebraska | 205 | 221 | 228 | 227 | 227 | 227 | 227 | 227 |
| North Dakota | 81 | 91 | 94 | 93 | 93 | 93 | 92 | 92 |
| South Dakota | 91 | 102 | 106 | 106 | 106 | 107 | 107 | 107 |
| South Atlantic | 4,179 | 5,536 | 6,091 | 6,330 | 6,410 | 6,474 | 6,542 | 6,630 |
| Delaware | 59 | 80 | 90 | 96 | 97 | 99 | 100 | 102 |
| District of Columbia | 71 | 71 | 70 | 66 | 66 | 65 | 64 | 64 |
| Florida | 1,579 | 2,174 | 2,396 | 2,473 | 2,493 | 2,511 | 2,531 | 2,558 |
| Georgia | 499 | 636 | 700 | 736 | 750 | 760 | 771 | 785 |
| Maryland | 381 | 496 | 542 | 562 | 570 | 576 | 582 | 589 |
| North Carolina | 588 | 786 | 878 | 925 | 939 | 952 | 965 | 980 |
| South Carolina | 279 | 383 | 428 | 454 | 463 | 470 | 477 | 486 |
| Virginia | 490 | 645 | 714 | 748 | 761 | 771 | 782 | 795 |
| West Virginia | 233 | 264 | 274 | 270 | 271 | 270 | 270 | 271 |
| East South Central | 1,613 | 1,887 | 2,000 | 2,041 | 2,060 | 2,072 | 2,084 | 2,107 |
| Alabama | 428 | 508 | 541 | 553 | 558 | 561 | 564 | 569 |
| Kentucky | 402 | 459 | 482 | 488 | 491 | 492 | 494 | 499 |
| Mississippi | 280 | 313 | 325 | 328 | 330 | 331 | 333 | 336 |
| Tennessee | 503 | 607 | 652 | 672 | 681 | 688 | 693 | 703 |
| West South Central | 2,363 | 2,880 | 3,120 | 3,232 | 3,274 | 3,299 | 3,328 | 3,369 |
| Arkansas | 303 | 343 | 356 | 358 | 359 | 359 | 360 | 362 |
| Louisiana | 380 | 460 | 488 | 495 | 498 | 498 | 500 | 504 |
| Oklahoma | 361 | 412 | 432 | 436 | 438 | 439 | 440 | 442 |
| Texas | 1,318 | 1,665 | 1,845 | 1,943 | 1,979 | 2,003 | 2,028 | 2,061 |
| Mountain | 1,043 | 1,490 | 1,726 | 1,863 | 1,906 | 1,944 | 1,983 | 2,028 |
| Arizona | 295 | 456 | 536 | 577 | 591 | 602 | 614 | 628 |
| Colorado | 244 | 324 | 367 | 395 | 403 | 410 | 416 | 424 |
| Idaho | 95 | 121 | 134 | 142 | 144 | 147 | 150 | 153 |
| Montana | 85 | 106 | 114 | 118 | 119 | 120 | 121 | 123 |
| Nevada | 65 | 128 | 172 | 200 | 209 | 218 | 227 | 236 |
| New Mexico | 114 | 160 | 182 | 196 | 200 | 203 | 207 | 211 |
| Utah | 108 | 147 | 168 | 178 | 183 | 186 | 189 | 193 |
| Wyoming | 38 | 47 | 54 | 57 | 57 | 58 | 59 | 60 |

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3a—Hospital Insurance and/or Supplementary Medical Insurance: Number of enrollees aged 65 or older, by census division and state or other area, July 1, 1980–2003, selected years (in thousands)—Continued

| Census division and state or area | 1980 | 1990 | 1995 | 1999 | 2000 | 2001 | 2002 | 2003 |
|-----------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|
| Pacific | 3,157 | 4,082 | 4,444 | 4,630 | 4,697 | 4,747 | 4,798 | 4,865 |
| Alaska | 11 | 22 | 28 | 33 | 35 | 36 | 38 | 39 |
| California | 2,346 | 2,990 | 3,241 | 3,385 | 3,436 | 3,474 | 3,509 | 3,556 |
| Hawaii | 74 | 118 | 138 | 148 | 151 | 153 | 155 | 157 |
| Oregon | 300 | 390 | 422 | 429 | 432 | 435 | 440 | 446 |
| Washington | 426 | 562 | 614 | 635 | 643 | 649 | 656 | 667 |
| Unknown | 22 | 10 | 18 | 12 | 11 | 11 | 10 | 10 |
| Outlying areas | 270 | 344 | 383 | 404 | 420 | 430 | 439 | 448 |
| Puerto Rico | 263 | 337 | 367 | 393 | 401 | 410 | 418 | 427 |
| Virgin Islands | 4 | 6 | 8 | 9 | 9 | 10 | 10 | 10 |
| Other | 3 | 1 | 8 | 2 | 10 | 10 | 11 | 11 |
| Foreign countries | 217 | 254 | 268 | 280 | 284 | 289 | 293 | 299 |

SOURCE: Centers for Medicare & Medicaid Services.

a. Represents beneficiaries of the 50 states and the District of Columbia and beneficiaries with unknown residence.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3b—Hospital Insurance and/or Supplementary Medical Insurance: Number of disabled enrollees, by census division and state or other area, July 1, 1980–2003, selected years (in thousands)

| Census division and state or area | 1980 | 1990 | 1995 | 1999 | 2000 | 2001 | 2002 | 2003 |
|-----------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|
| Total | | | | | | | | |
| All areas | 2,963 | 3,255 | 4,393 | 5,212 | 5,367 | 5,563 | 5,810 | 6,079 |
| United States ^a | 2,863 | 3,149 | 4,266 | 5,062 | 5,208 | 5,406 | 5,648 | 5,912 |
| New England | 141 | 156 | 228 | 277 | 285 | 295 | 307 | 319 |
| Connecticut | 31 | 33 | 47 | 56 | 58 | 59 | 62 | 64 |
| Maine | 16 | 18 | 27 | 35 | 36 | 38 | 40 | 42 |
| Massachusetts | 64 | 72 | 108 | 128 | 131 | 135 | 139 | 144 |
| New Hampshire | 9 | 11 | 17 | 22 | 23 | 24 | 26 | 27 |
| Rhode Island | 14 | 14 | 19 | 23 | 24 | 25 | 26 | 27 |
| Vermont | 7 | 7 | 10 | 13 | 13 | 14 | 14 | 15 |
| Middle Atlantic | 493 | 473 | 603 | 713 | 731 | 755 | 784 | 814 |
| New Jersey | 91 | 86 | 110 | 130 | 133 | 138 | 142 | 147 |
| New York | 237 | 229 | 302 | 360 | 368 | 378 | 391 | 402 |
| Pennsylvania | 165 | 158 | 190 | 223 | 230 | 239 | 251 | 265 |
| East North Central | 486 | 561 | 715 | 807 | 823 | 845 | 877 | 916 |
| Illinois | 113 | 132 | 172 | 192 | 195 | 200 | 207 | 215 |
| Indiana | 63 | 77 | 99 | 113 | 117 | 120 | 125 | 132 |
| Michigan | 118 | 132 | 170 | 195 | 200 | 207 | 216 | 227 |
| Ohio | 141 | 156 | 196 | 219 | 221 | 226 | 233 | 241 |
| Wisconsin | 50 | 64 | 79 | 88 | 90 | 92 | 96 | 101 |
| West North Central | 180 | 211 | 280 | 328 | 338 | 351 | 370 | 387 |
| Iowa | 29 | 34 | 43 | 49 | 50 | 52 | 54 | 57 |
| Kansas | 22 | 26 | 35 | 42 | 43 | 45 | 47 | 49 |
| Minnesota | 35 | 44 | 60 | 69 | 72 | 74 | 78 | 82 |
| Missouri | 67 | 75 | 100 | 120 | 124 | 130 | 137 | 144 |
| Nebraska | 14 | 16 | 22 | 25 | 26 | 27 | 29 | 30 |
| North Dakota | 6 | 7 | 9 | 10 | 10 | 10 | 11 | 11 |
| South Dakota | 7 | 8 | 11 | 13 | 13 | 13 | 14 | 14 |
| South Atlantic | 545 | 607 | 834 | 1,034 | 1,075 | 1,125 | 1,179 | 1,236 |
| Delaware | 7 | 8 | 11 | 14 | 15 | 15 | 16 | 17 |
| District of Columbia | 8 | 7 | 8 | 9 | 10 | 10 | 10 | 10 |
| Florida | 147 | 165 | 232 | 298 | 311 | 328 | 345 | 363 |
| Georgia | 88 | 96 | 134 | 161 | 166 | 173 | 180 | 188 |
| Maryland | 41 | 46 | 60 | 72 | 75 | 78 | 82 | 85 |
| North Carolina | 91 | 106 | 149 | 186 | 194 | 203 | 214 | 225 |
| South Carolina | 51 | 59 | 81 | 101 | 105 | 110 | 115 | 121 |
| Virginia | 68 | 77 | 105 | 128 | 132 | 138 | 144 | 151 |
| West Virginia | 43 | 44 | 55 | 65 | 67 | 70 | 73 | 76 |
| East South Central | 246 | 287 | 397 | 480 | 495 | 518 | 543 | 570 |
| Alabama | 63 | 74 | 101 | 123 | 127 | 134 | 142 | 151 |
| Kentucky | 62 | 75 | 105 | 128 | 132 | 137 | 143 | 149 |
| Mississippi | 46 | 53 | 72 | 86 | 88 | 92 | 96 | 101 |
| Tennessee | 76 | 85 | 119 | 143 | 148 | 155 | 162 | 169 |
| West South Central | 288 | 317 | 452 | 528 | 539 | 559 | 584 | 614 |
| Arkansas | 45 | 48 | 67 | 78 | 80 | 83 | 86 | 90 |
| Louisiana | 63 | 71 | 93 | 103 | 104 | 107 | 112 | 116 |
| Oklahoma | 41 | 39 | 56 | 67 | 69 | 72 | 75 | 79 |
| Texas | 139 | 159 | 236 | 280 | 286 | 297 | 311 | 329 |
| Mountain | 112 | 148 | 228 | 276 | 284 | 295 | 312 | 327 |
| Arizona | 34 | 42 | 66 | 81 | 84 | 89 | 95 | 101 |
| Colorado | 24 | 34 | 54 | 64 | 65 | 66 | 68 | 69 |
| Idaho | 9 | 11 | 16 | 20 | 21 | 22 | 23 | 25 |
| Montana | 9 | 12 | 16 | 18 | 18 | 18 | 19 | 20 |
| Nevada | 8 | 13 | 22 | 29 | 30 | 32 | 35 | 37 |
| New Mexico | 15 | 19 | 28 | 33 | 34 | 35 | 37 | 39 |
| Utah | 9 | 13 | 20 | 23 | 24 | 25 | 26 | 27 |
| Wyoming | 3 | 4 | 7 | 8 | 8 | 8 | 9 | 9 |

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3b—Hospital Insurance and/or Supplementary Medical Insurance: Number of disabled enrollees, by census division and state or other area, July 1, 1980–2003, selected years (in thousands)—Continued

| Census division and state or area | 1980 | 1990 | 1995 | 1999 | 2000 | 2001 | 2002 | 2003 |
|-----------------------------------|------|------|------|------|------|------|------|------|
| Pacific | 367 | 388 | 529 | 618 | 637 | 662 | 692 | 726 |
| Alaska | 2 | 3 | 5 | 7 | 7 | 8 | 8 | 9 |
| California | 284 | 289 | 392 | 452 | 465 | 481 | 500 | 522 |
| Hawaii | 7 | 9 | 11 | 14 | 15 | 15 | 17 | 18 |
| Oregon | 31 | 34 | 47 | 55 | 57 | 61 | 64 | 68 |
| Washington | 43 | 53 | 74 | 90 | 93 | 97 | 103 | 109 |
| Unknown | 4 | 2 | 1 | 1 | 1 | 1 | 2 | 2 |
| Outlying areas | 88 | 93 | 111 | 134 | 139 | 142 | 147 | 152 |
| Puerto Rico | 88 | 92 | 110 | 132 | 136 | 139 | 144 | 148 |
| Virgin Islands | -- | 1 | 1 | 1 | 1 | 1 | 1 | 2 |
| Other | -- | -- | -- | 1 | 2 | 2 | 2 | 2 |
| Foreign countries | 12 | 14 | 14 | 14 | 14 | 15 | 15 | 15 |

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: -- = not available.

a. Represents beneficiaries of the 50 states and the District of Columbia and beneficiaries with unknown residence.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B4—Hospital Insurance and/or Supplementary Medical Insurance: Number of enrollees aged 65 or older, by program, age, sex, and race, July 1, 1980–2003, selected years (in thousands)

| Age, sex, and race | 1980 | 1985 | 1990 | 1995 | 2000 | 2001 | 2002 | 2003 |
|--|--------|--------|--------|--------|--------|--------|--------|--------|
| <i>Hospital Insurance and/or Supplementary Medical Insurance</i> | | | | | | | | |
| Total | 25,515 | 28,176 | 30,948 | 33,142 | 34,253 | 34,463 | 34,680 | 35,008 |
| Age | | | | | | | | |
| 65–69 | 8,459 | 8,956 | 9,695 | 9,517 | 9,167 | 9,201 | 9,274 | 9,466 |
| 70–74 | 6,756 | 7,441 | 7,951 | 8,756 | 8,609 | 8,564 | 8,480 | 8,394 |
| 75–79 | 4,809 | 5,453 | 6,058 | 6,563 | 7,285 | 7,285 | 7,292 | 7,302 |
| 80–84 | 3,081 | 3,463 | 3,957 | 4,470 | 4,870 | 5,022 | 5,173 | 5,283 |
| 85 or older | 2,410 | 2,861 | 3,286 | 3,837 | 4,322 | 4,391 | 4,461 | 4,563 |
| Sex | | | | | | | | |
| Men | 10,268 | 11,282 | 12,416 | 13,434 | 14,112 | 14,263 | 14,418 | 14,625 |
| Women | 15,247 | 16,894 | 18,532 | 19,708 | 20,141 | 20,199 | 20,261 | 20,382 |
| Race | | | | | | | | |
| White | 22,534 | 24,745 | 26,855 | 29,011 | 29,757 | 29,883 | 29,974 | 30,195 |
| All other races | 2,257 | 2,585 | 3,114 | 3,253 | 4,403 | 4,495 | 4,627 | 4,741 |
| Unknown | 724 | 846 | 979 | 878 | 92 | 85 | 78 | 72 |
| <i>Hospital Insurance</i> | | | | | | | | |
| Total | 25,104 | 27,683 | 30,464 | 32,742 | 33,833 | 34,044 | 34,257 | 34,581 |
| Age | | | | | | | | |
| 65–69 | 8,302 | 8,818 | 9,565 | 9,411 | 9,074 | 9,111 | 9,183 | 9,373 |
| 70–74 | 6,592 | 7,292 | 7,829 | 8,652 | 8,505 | 8,462 | 8,380 | 8,295 |
| 75–79 | 4,731 | 5,315 | 5,947 | 6,483 | 7,189 | 7,189 | 7,196 | 7,206 |
| 80–84 | 3,072 | 3,403 | 3,872 | 4,409 | 4,806 | 4,956 | 5,103 | 5,211 |
| 85 or older | 2,407 | 2,854 | 3,252 | 3,787 | 4,259 | 4,326 | 4,395 | 4,496 |
| Sex | | | | | | | | |
| Men | 10,156 | 11,146 | 12,280 | 13,310 | 13,979 | 14,130 | 14,284 | 14,489 |
| Women | 14,948 | 16,536 | 18,184 | 19,431 | 19,854 | 19,914 | 19,974 | 20,092 |
| Race | | | | | | | | |
| White | 22,244 | 24,424 | 26,591 | 28,822 | 29,570 | 29,700 | 29,792 | 30,013 |
| All other races | 2,160 | 2,444 | 2,931 | 3,127 | 4,176 | 4,264 | 4,392 | 4,500 |
| Unknown | 699 | 815 | 942 | 792 | 87 | 80 | 73 | 68 |
| <i>Supplementary Medical Insurance</i> | | | | | | | | |
| Total | 24,680 | 27,311 | 29,686 | 31,742 | 32,590 | 32,749 | 32,934 | 33,203 |
| Age | | | | | | | | |
| 65–69 | 8,156 | 8,607 | 9,008 | 8,830 | 8,330 | 8,340 | 8,401 | 8,554 |
| 70–74 | 6,570 | 7,277 | 7,740 | 8,430 | 8,256 | 8,200 | 8,107 | 8,012 |
| 75–79 | 4,684 | 5,333 | 5,942 | 6,431 | 7,088 | 7,083 | 7,090 | 7,100 |
| 80–84 | 2,981 | 3,381 | 3,879 | 4,392 | 4,782 | 4,926 | 5,068 | 5,169 |
| 85 or older | 2,289 | 2,712 | 3,118 | 3,659 | 4,134 | 4,200 | 4,268 | 4,368 |
| Sex | | | | | | | | |
| Men | 9,868 | 10,852 | 11,758 | 12,694 | 13,205 | 13,328 | 13,466 | 13,640 |
| Women | 14,813 | 16,459 | 17,927 | 19,048 | 19,384 | 19,420 | 19,468 | 19,562 |
| Race | | | | | | | | |
| White | 21,876 | 24,060 | 25,849 | 27,899 | 28,432 | 28,519 | 28,592 | 28,765 |
| All other races | 2,114 | 2,441 | 2,910 | 3,028 | 4,086 | 4,166 | 4,285 | 4,386 |
| Unknown | 691 | 810 | 927 | 815 | 71 | 64 | 58 | 52 |

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B5—Hospital Insurance and/or Supplementary Medical Insurance: Number of enrollees under age 65 who are disabled or have end-stage renal disease, by program, age, sex, and race, July 1, 1980–2003, selected years

| Age, sex, and race | 1980 | | 1990 | | 2000 | | 2002 | | 2003 | |
|--|--------------|------------------------------|--------------|------------------------------|--------------|------------------------------|--------------|------------------------------|--------------|------------------------------|
| | All disabled | End stage renal disease only | All disabled | End stage renal disease only | All disabled | End stage renal disease only | All disabled | End stage renal disease only | All disabled | End stage renal disease only |
| Hospital Insurance and/or Supplementary Medical Insurance | | | | | | | | | | |
| Total | 2,963,175 | 28,334 | 3,255,007 | 64,692 | 5,367,151 | 73,890 | 5,809,611 | 79,353 | 6,079,424 | 81,662 |
| Age | | | | | | | | | | |
| Under 35 | 371,204 | 8,773 | 483,265 | 16,603 | 522,321 | 13,255 | 532,378 | 13,661 | 553,946 | 13,801 |
| 35–44 | 369,460 | 5,188 | 654,957 | 14,159 | 1,129,288 | 15,084 | 1,145,800 | 15,363 | 1,154,953 | 15,428 |
| 45–54 | 657,486 | 6,977 | 741,200 | 15,800 | 1,627,238 | 22,647 | 1,797,665 | 24,287 | 1,885,826 | 25,323 |
| 55–64 | 1,565,025 | 7,396 | 1,375,585 | 18,130 | 2,088,304 | 22,904 | 2,333,768 | 26,042 | 2,484,699 | 27,110 |
| Sex | | | | | | | | | | |
| Men | 1,870,558 | 14,547 | 2,042,944 | 33,647 | 3,014,107 | 40,062 | 3,194,079 | 43,239 | 3,311,265 | 44,736 |
| Women | 1,092,617 | 13,787 | 1,212,063 | 31,045 | 2,353,044 | 33,828 | 2,615,532 | 36,114 | 2,768,159 | 36,926 |
| Race | | | | | | | | | | |
| White | 2,422,253 | 19,232 | 2,480,767 | 35,638 | 3,989,357 | 35,636 | 4,301,138 | 37,556 | 4,495,109 | 37,913 |
| All other races | 486,677 | 7,907 | 712,315 | 26,477 | 1,362,457 | 37,820 | 1,494,904 | 41,566 | 1,571,271 | 43,551 |
| Unknown | 54,245 | 1,195 | 61,925 | 2,577 | 15,337 | 434 | 13,569 | 231 | 13,044 | 198 |
| Hospital Insurance | | | | | | | | | | |
| Total | 2,963,156 | 28,334 | 3,254,983 | 64,677 | 5,366,598 | 73,890 | 5,809,174 | 79,353 | 6,076,034 | 81,652 |
| Age | | | | | | | | | | |
| Under 35 | 371,199 | 8,773 | 483,262 | 16,601 | 522,123 | 13,255 | 532,284 | 13,661 | 553,083 | 13,797 |
| 35–44 | 369,458 | 5,188 | 654,953 | 14,157 | 1,129,170 | 15,084 | 1,145,693 | 15,363 | 1,154,266 | 15,427 |
| 45–54 | 657,483 | 6,977 | 741,193 | 15,794 | 1,627,107 | 22,647 | 1,797,555 | 24,287 | 1,884,907 | 25,320 |
| 55–64 | 1,565,016 | 7,396 | 1,375,575 | 18,125 | 2,088,198 | 22,904 | 2,333,642 | 26,042 | 2,483,778 | 27,108 |
| Sex | | | | | | | | | | |
| Men | 1,870,543 | 14,547 | 2,042,929 | 33,639 | 3,013,803 | 40,062 | 3,193,844 | 43,239 | 3,309,440 | 44,729 |
| Women | 1,092,613 | 13,787 | 1,212,054 | 31,038 | 2,352,795 | 33,828 | 2,615,330 | 36,114 | 2,766,594 | 36,923 |
| Race | | | | | | | | | | |
| White | 2,422,239 | 19,232 | 2,480,754 | 35,631 | 3,988,957 | 35,636 | 4,300,844 | 37,556 | 4,493,014 | 37,907 |
| All other races | 486,672 | 7,907 | 712,304 | 26,469 | 1,362,305 | 37,820 | 1,494,763 | 41,566 | 1,569,996 | 43,547 |
| Unknown | 54,245 | 1,195 | 61,925 | 2,577 | 15,336 | 434 | 13,567 | 231 | 13,024 | 198 |
| Supplementary Medical Insurance | | | | | | | | | | |
| Total | 2,719,226 | 27,046 | 2,943,480 | 58,912 | 4,769,804 | 68,800 | 5,144,421 | 73,285 | 5,386,970 | 75,042 |
| Age | | | | | | | | | | |
| Under 35 | 339,665 | 8,294 | 441,640 | 14,782 | 466,869 | 12,159 | 474,464 | 12,429 | 494,729 | 12,520 |
| 35–44 | 337,146 | 4,963 | 586,537 | 12,567 | 998,230 | 13,783 | 1,007,411 | 13,866 | 1,015,672 | 13,854 |
| 45–54 | 596,287 | 6,683 | 666,257 | 14,559 | 1,421,904 | 20,961 | 1,568,114 | 22,343 | 1,650,064 | 23,087 |
| 55–64 | 1,446,128 | 7,106 | 1,249,046 | 17,004 | 1,882,801 | 21,897 | 2,094,432 | 24,647 | 2,226,505 | 25,581 |
| Sex | | | | | | | | | | |
| Men | 1,694,569 | 13,887 | 1,833,959 | 30,338 | 2,665,252 | 37,037 | 2,813,277 | 39,551 | 2,917,468 | 40,651 |
| Women | 1,024,657 | 13,159 | 1,109,521 | 28,574 | 2,104,552 | 31,763 | 2,331,144 | 33,734 | 2,469,502 | 34,391 |
| Race | | | | | | | | | | |
| White | 2,218,176 | 18,458 | 2,236,781 | 32,347 | 3,535,008 | 33,154 | 3,799,460 | 34,747 | 3,974,030 | 34,952 |
| All other races | 449,753 | 7,446 | 650,121 | 24,240 | 1,221,836 | 35,256 | 1,333,260 | 38,324 | 1,401,696 | 39,907 |
| Unknown | 51,297 | 1,142 | 56,578 | 2,325 | 12,960 | 390 | 11,701 | 214 | 11,244 | 183 |

SOURCE: Centers for Medicare & Medicaid Services.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8a—Hospital Insurance: Average covered charge per covered day of care in short-stay hospitals, by census division and state or other area, selected years 1975–2003 (in dollars)

| Census division and state or area ^a | 1975 | 1980 | 1990 | 1995 | 2000 | 2001 | 2002 | 2003 |
|--|------|------|-------|-------|-------|-------|-------|-------|
| Total | | | | | | | | |
| All areas ^b | 143 | 292 | 1,090 | 1,908 | 2,762 | 3,080 | 3,574 | 4,117 |
| United States ^c | 144 | 293 | 1,081 | 1,920 | 2,787 | 3,108 | 3,608 | 4,157 |
| New England | 159 | 298 | 988 | 1,763 | 2,436 | 2,610 | 2,862 | 3,194 |
| Connecticut | 167 | 287 | 1,177 | 2,013 | 2,608 | 2,726 | 3,014 | 3,413 |
| Maine | 133 | 284 | 927 | 1,645 | 2,328 | 2,489 | 2,763 | 3,042 |
| Massachusetts | 168 | 316 | 942 | 1,705 | 2,429 | 2,598 | 2,797 | 3,100 |
| New Hampshire | 123 | 264 | 1,022 | 1,699 | 2,480 | 2,696 | 3,027 | 3,384 |
| Rhode Island | 154 | 284 | 851 | 1,638 | 2,316 | 2,654 | 2,967 | 3,290 |
| Vermont | 124 | 230 | 923 | 1,580 | 1,995 | 2,145 | 2,356 | 2,660 |
| Middle Atlantic | 163 | 304 | 943 | 1,704 | 2,743 | 3,169 | 3,925 | 4,763 |
| New Jersey | 157 | 300 | 725 | 1,865 | 3,757 | 4,767 | 6,157 | 7,447 |
| New York | 176 | 301 | 836 | 1,366 | 2,116 | 2,328 | 2,817 | 3,412 |
| Pennsylvania | 145 | 312 | 1,236 | 2,109 | 3,003 | 3,334 | 3,979 | 4,791 |
| East North Central | 140 | 294 | 1,097 | 1,866 | 2,550 | 2,786 | 3,135 | 3,547 |
| Illinois | 148 | 322 | 1,202 | 2,126 | 3,017 | 3,282 | 3,645 | 4,094 |
| Indiana | 116 | 236 | 997 | 1,713 | 2,271 | 2,466 | 2,731 | 3,061 |
| Michigan | 156 | 332 | 1,193 | 1,881 | 2,451 | 2,626 | 2,925 | 3,310 |
| Ohio | 134 | 277 | 1,030 | 1,730 | 2,360 | 2,605 | 2,995 | 3,443 |
| Wisconsin | 128 | 251 | 933 | 1,690 | 2,424 | 2,744 | 3,154 | 3,541 |
| West North Central | 117 | 248 | 1,052 | 1,831 | 2,638 | 2,924 | 3,305 | 3,732 |
| Iowa | 110 | 239 | 902 | 1,573 | 2,124 | 2,346 | 2,663 | 3,031 |
| Kansas | 113 | 244 | 1,093 | 1,957 | 2,589 | 2,851 | 3,225 | 3,768 |
| Minnesota | 124 | 248 | 1,132 | 1,938 | 2,913 | 3,217 | 3,666 | 4,162 |
| Missouri | 119 | 257 | 1,108 | 1,922 | 2,783 | 3,074 | 3,385 | 3,747 |
| Nebraska | 116 | 251 | 1,043 | 1,850 | 3,007 | 3,418 | 4,031 | 4,497 |
| North Dakota | 118 | 237 | 937 | 1,509 | 2,180 | 2,376 | 2,663 | 2,989 |
| South Dakota | 107 | 228 | 915 | 1,518 | 2,167 | 2,424 | 2,870 | 3,266 |
| South Atlantic | 135 | 273 | 1,106 | 1,876 | 2,637 | 2,921 | 3,337 | 3,776 |
| Delaware | 153 | 274 | 1,191 | 1,831 | 1,971 | 2,147 | 2,384 | 2,631 |
| District of Columbia | 174 | 373 | 1,374 | 2,129 | 3,331 | 3,544 | 3,829 | 4,437 |
| Florida | 161 | 321 | 1,360 | 2,351 | 3,439 | 3,832 | 4,406 | 5,030 |
| Georgia | 125 | 258 | 1,081 | 1,744 | 2,527 | 2,763 | 3,101 | 3,552 |
| Maryland | 164 | 274 | 813 | 1,365 | 1,608 | 1,708 | 1,859 | 1,951 |
| North Carolina | 101 | 214 | 932 | 1,603 | 2,175 | 2,404 | 2,672 | 2,963 |
| South Carolina | 106 | 229 | 1,021 | 1,818 | 2,611 | 2,935 | 3,368 | 3,799 |
| Virginia | 118 | 247 | 1,022 | 1,732 | 2,432 | 2,674 | 3,082 | 3,474 |
| West Virginia | 108 | 247 | 1,009 | 1,472 | 1,821 | 1,978 | 2,193 | 2,433 |
| East South Central | 115 | 243 | 1,019 | 1,718 | 2,451 | 2,668 | 3,016 | 3,457 |
| Alabama | 126 | 282 | 1,176 | 2,054 | 2,914 | 3,204 | 3,612 | 4,143 |
| Kentucky | 107 | 216 | 967 | 1,630 | 2,269 | 2,448 | 2,751 | 3,117 |
| Mississippi | 98 | 213 | 865 | 1,437 | 2,017 | 2,214 | 2,504 | 2,883 |
| Tennessee | 122 | 250 | 1,012 | 1,662 | 2,479 | 2,675 | 3,031 | 3,485 |
| West South Central | 117 | 253 | 1,138 | 1,937 | 2,767 | 3,094 | 3,539 | 4,045 |
| Arkansas | 104 | 231 | 923 | 1,511 | 2,194 | 2,468 | 2,773 | 3,152 |
| Louisiana | 116 | 265 | 1,180 | 1,926 | 2,724 | 3,019 | 3,369 | 3,700 |
| Oklahoma | 128 | 271 | 997 | 1,620 | 2,335 | 2,559 | 2,841 | 3,263 |
| Texas | 118 | 250 | 1,212 | 2,118 | 3,008 | 3,366 | 3,890 | 4,486 |
| Mountain | 142 | 305 | 1,350 | 2,321 | 3,279 | 3,639 | 4,090 | 4,630 |
| Arizona | 155 | 325 | 1,442 | 2,617 | 3,885 | 4,237 | 4,663 | 5,197 |
| Colorado | 144 | 288 | 1,308 | 2,240 | 3,392 | 3,812 | 4,329 | 4,859 |
| Idaho | 129 | 273 | 1,140 | 1,951 | 2,471 | 2,725 | 2,997 | 3,304 |
| Montana | 116 | 262 | 1,036 | 1,742 | 2,233 | 2,501 | 2,756 | 3,091 |
| Nevada | 177 | 424 | 2,031 | 3,253 | 4,320 | 4,773 | 5,418 | 6,237 |
| New Mexico | 133 | 293 | 1,140 | 1,913 | 2,533 | 2,814 | 3,149 | 3,591 |
| Utah | 142 | 316 | 1,283 | 2,069 | 2,871 | 3,111 | 3,375 | 3,777 |
| Wyoming | 109 | 245 | 1,094 | 1,985 | 2,373 | 2,621 | 2,911 | 3,319 |

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8a—Hospital Insurance: Average covered charge per covered day of care in short-stay hospitals, by census division and state or other area, selected years 1975–2003 (in dollars)—Continued

| Census division and state or area ^a | 1975 | 1980 | 1990 | 1995 | 2000 | 2001 | 2002 | 2003 |
|--|------|------|-------|-------|-------|-------|-------|-------|
| Pacific | 196 | 416 | 1,651 | 2,877 | 4,228 | 4,759 | 5,648 | 6,495 |
| Alaska | 228 | 379 | 1,470 | 2,385 | 3,144 | 3,390 | 3,757 | 4,521 |
| California | 206 | 448 | 1,794 | 3,156 | 4,701 | 5,324 | 6,363 | 7,283 |
| Hawaii | 148 | 333 | 1,224 | 2,319 | 2,991 | 3,138 | 3,440 | 3,800 |
| Oregon | 158 | 329 | 1,275 | 1,987 | 2,717 | 2,980 | 3,245 | 3,707 |
| Washington | 163 | 293 | 1,162 | 1,924 | 2,708 | 3,008 | 3,455 | 3,972 |
| Outlying areas | 77 | 152 | 510 | 739 | 947 | 990 | 1,055 | 1,077 |
| Puerto Rico | 77 | 151 | 505 | 736 | 946 | 988 | 1,050 | 1,069 |
| Virgin Islands | 92 | 161 | 746 | 843 | 1,007 | 1,112 | 1,372 | 1,568 |
| Other | 88 | 263 | ... | ... | ... | ... | ... | ... |

SOURCE: Centers for Medicare & Medicaid.

NOTES: Data for 1975 and 1980 are based on bills approved in each year and recorded in the Centers for Medicare & Medicaid Services before December 29, 1995. Data from 1990–2003 are based on bills incurred in each year and recorded before June 27, 2003. Includes data for services rendered to both aged and disabled persons.

... = not applicable.

- a. Geographic distribution reflects the beneficiaries' area of residence.
- b. Excludes claims for persons residing in foreign countries.
- c. Includes claims for persons whose place of residence is unknown.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8b—Hospital Insurance: Average covered charge per covered day of care in skilled nursing facilities, by census division and state or other area, selected years 1975–2003 (in dollars)

| Census division and state or area ^a | 1975 | 1980 | 1990 | 1995 | 2000 | 2001 | 2002 | 2003 |
|--|------|------|------|------|------|------|------|------|
| Total | | | | | | | | |
| All areas ^b | 43 | 70 | 193 | 402 | 462 | 463 | 475 | 488 |
| United States ^c | 43 | 70 | 193 | 402 | 462 | 463 | 475 | 488 |
| New England | 50 | 77 | 172 | 347 | 431 | 438 | 459 | 480 |
| Connecticut | 35 | 51 | 165 | 314 | 388 | 396 | 427 | 445 |
| Maine | 52 | 100 | 274 | 308 | 406 | 432 | 469 | 485 |
| Massachusetts | 63 | 98 | 181 | 380 | 484 | 487 | 494 | 519 |
| New Hampshire | 41 | 86 | 218 | 412 | 410 | 437 | 470 | 484 |
| Rhode Island | 43 | 59 | 129 | 265 | 392 | 374 | 405 | 430 |
| Vermont | 38 | 62 | 155 | 266 | 357 | 363 | 392 | 410 |
| Middle Atlantic | 50 | 73 | 168 | 308 | 428 | 437 | 466 | 491 |
| New Jersey | 45 | 81 | 164 | 344 | 434 | 450 | 504 | 532 |
| New York | 61 | 80 | 168 | 240 | 360 | 375 | 402 | 432 |
| Pennsylvania | 40 | 65 | 170 | 373 | 510 | 506 | 522 | 535 |
| East North Central | 40 | 68 | 167 | 358 | 450 | 458 | 464 | 481 |
| Illinois | 37 | 77 | 215 | 421 | 528 | 528 | 533 | 556 |
| Indiana | 35 | 60 | 180 | 399 | 447 | 449 | 444 | 448 |
| Michigan | 45 | 60 | 130 | 270 | 376 | 398 | 405 | 425 |
| Ohio | 41 | 69 | 157 | 375 | 462 | 464 | 476 | 485 |
| Wisconsin | 35 | 64 | 149 | 315 | 343 | 358 | 372 | 397 |
| West North Central | 45 | 82 | 194 | 367 | 473 | 465 | 483 | 508 |
| Iowa | 46 | 84 | 269 | 406 | 490 | 506 | 539 | 560 |
| Kansas | 39 | 66 | 255 | 461 | 539 | 515 | 507 | 509 |
| Minnesota | 46 | 94 | 125 | 245 | 306 | 311 | 363 | 409 |
| Missouri | 47 | 95 | 263 | 465 | 603 | 576 | 562 | 575 |
| Nebraska | 41 | 71 | 205 | 338 | 484 | 476 | 503 | 524 |
| North Dakota | 43 | 49 | 118 | 221 | 408 | 389 | 409 | 443 |
| South Dakota | 33 | 61 | 160 | 270 | 326 | 348 | 380 | 435 |
| South Atlantic | 34 | 59 | 168 | 396 | 405 | 401 | 410 | 423 |
| Delaware | 31 | 50 | 132 | 328 | 345 | 351 | 380 | 410 |
| District of Columbia | 34 | 64 | 193 | 389 | 437 | 430 | 483 | 509 |
| Florida | 34 | 59 | 195 | 488 | 447 | 426 | 421 | 432 |
| Georgia | 34 | 71 | 146 | 346 | 356 | 356 | 385 | 392 |
| Maryland | 37 | 56 | 141 | 347 | 403 | 402 | 416 | 428 |
| North Carolina | 31 | 52 | 132 | 283 | 342 | 357 | 368 | 399 |
| South Carolina | 26 | 46 | 159 | 337 | 384 | 389 | 414 | 403 |
| Virginia | 42 | 68 | 168 | 331 | 374 | 388 | 404 | 416 |
| West Virginia | 36 | 64 | 171 | 364 | 446 | 462 | 466 | 494 |
| East South Central | 37 | 56 | 154 | 358 | 420 | 431 | 439 | 433 |
| Alabama | 33 | 38 | 143 | 353 | 381 | 379 | 400 | 405 |
| Kentucky | 36 | 58 | 151 | 352 | 439 | 440 | 431 | 450 |
| Mississippi | 45 | 105 | 160 | 377 | 480 | 513 | 522 | 523 |
| Tennessee | 41 | 70 | 162 | 358 | 407 | 427 | 435 | 407 |
| West South Central | 45 | 94 | 267 | 539 | 579 | 568 | 549 | 537 |
| Arkansas | 44 | 84 | 238 | 372 | 499 | 507 | 571 | 575 |
| Louisiana | 43 | 83 | 374 | 683 | 754 | 719 | 687 | 673 |
| Oklahoma | 60 | 145 | 312 | 563 | 579 | 599 | 588 | 584 |
| Texas | 43 | 78 | 238 | 542 | 556 | 541 | 511 | 496 |
| Mountain | 38 | 64 | 226 | 486 | 477 | 466 | 461 | 456 |
| Arizona | 41 | 71 | 236 | 549 | 535 | 491 | 450 | 432 |
| Colorado | 42 | 73 | 266 | 538 | 502 | 491 | 488 | 471 |
| Idaho | 27 | 46 | 152 | 381 | 384 | 401 | 419 | 428 |
| Montana | 30 | 44 | 123 | 291 | 362 | 378 | 405 | 408 |
| Nevada | 37 | 66 | 232 | 569 | 592 | 580 | 467 | 423 |
| New Mexico | 57 | 122 | 267 | 488 | 534 | 534 | 545 | 553 |
| Utah | 36 | 75 | 266 | 473 | 435 | 432 | 460 | 483 |
| Wyoming | 36 | 49 | 208 | 379 | 421 | 402 | 441 | 474 |

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8b—Hospital Insurance: Average covered charge per covered day of care in skilled nursing facilities, by census division and state or other area, selected years 1975–2003 (in dollars)—Continued

| Census division and state or area ^a | 1975 | 1980 | 1990 | 1995 | 2000 | 2001 | 2002 | 2003 |
|--|------|------|------|------|------|------|------|------|
| Pacific | 45 | 81 | 269 | 576 | 584 | 584 | 613 | 629 |
| Alaska | 68 | 115 | 283 | 437 | 0 | 789 | 746 | 676 |
| California | 46 | 87 | 287 | 629 | 0 | 644 | 683 | 697 |
| Hawaii | 49 | 83 | 217 | 467 | 469 | 523 | 532 | 555 |
| Oregon | 40 | 63 | 207 | 421 | 382 | 377 | 387 | 400 |
| Washington | 34 | 62 | 196 | 412 | 390 | 404 | 421 | 426 |
| Outlying areas | | | | | | | | |
| Puerto Rico | 51 | 97 | 202 | 261 | 362 | 359 | 354 | 371 |
| Virgin Islands | 43 | 104 | 171 | 370 | 399 | 474 | 763 | 490 |

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Data from 1975 to 1995 are based on bills approved in each year and recorded in the Centers for Medicare & Medicaid Services before December 29, 1995. Data from 2000 to 2003 are based on bills incurred in each year and recorded in the Centers for Medicare & Medicaid Services before June 27, 2004. Includes data for services rendered to both aged and disabled persons.

- a. Geographic distribution reflects the beneficiaries' area of residence.
- b. Excludes claims for persons residing in foreign countries.
- c. Includes claims for persons whose place of residence is unknown.

CONTACT: Maria Diacogiannis (410) 786-0178.

Table 8.B8.1—Hospital Insurance: Short-stay hospital discharges, by state or other area, selected fiscal years 1990–2003

| State or area | 1990 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 |
|----------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| All areas | 10,472,587 | 11,680,874 | 11,749,394 | 11,952,088 | 11,912,079 | 11,659,885 | 11,778,705 | 12,192,174 | 12,499,749 | 12,698,388 |
| Alabama | 226,359 | 255,013 | 258,908 | 265,029 | 266,603 | 266,541 | 274,518 | 282,999 | 291,991 | 294,850 |
| Alaska | 6,491 | 8,635 | 9,593 | 9,917 | 10,633 | 11,031 | 11,684 | 11,748 | 11,794 | 11,398 |
| Arizona | 140,069 | 139,564 | 146,446 | 150,597 | 150,190 | 128,363 | 135,143 | 144,989 | 156,302 | 165,231 |
| Arkansas | 143,363 | 152,516 | 154,626 | 157,920 | 160,379 | 160,880 | 164,310 | 166,445 | 170,102 | 170,421 |
| California | 834,829 | 875,926 | 889,323 | 901,018 | 921,068 | 780,295 | 740,564 | 756,629 | 801,758 | 836,444 |
| Colorado | 98,262 | 105,216 | 102,450 | 103,735 | 97,479 | 100,648 | 101,486 | 101,258 | 107,180 | 109,879 |
| Connecticut | 114,938 | 141,765 | 141,031 | 143,071 | 133,672 | 125,115 | 124,951 | 135,169 | 148,864 | 154,460 |
| Delaware | 26,125 | 30,336 | 30,051 | 30,632 | 30,738 | 33,287 | 34,049 | 36,386 | 36,541 | 38,216 |
| District of Columbia | 36,062 | 39,526 | 38,661 | 38,508 | 38,661 | 38,693 | 39,112 | 40,138 | 39,389 | 39,151 |
| Florida | 579,368 | 742,862 | 739,066 | 743,556 | 758,714 | 736,958 | 765,130 | 823,957 | 869,777 | 899,404 |
| Georgia | 274,957 | 316,301 | 323,093 | 327,839 | 320,774 | 311,998 | 324,286 | 334,599 | 338,687 | 342,392 |
| Hawaii | 26,340 | 32,526 | 32,939 | 34,795 | 33,331 | 26,347 | 26,146 | 26,343 | 26,932 | 26,302 |
| Idaho | 31,559 | 36,327 | 39,236 | 41,066 | 42,451 | 43,353 | 44,027 | 43,272 | 40,996 | 40,738 |
| Illinois | 460,926 | 533,238 | 524,936 | 538,476 | 531,184 | 539,314 | 556,122 | 578,327 | 601,373 | 607,561 |
| Indiana | 254,404 | 276,601 | 278,303 | 287,615 | 289,743 | 289,693 | 297,851 | 306,202 | 304,034 | 303,404 |
| Iowa | 141,191 | 146,448 | 148,724 | 151,815 | 154,152 | 155,497 | 159,451 | 162,466 | 156,854 | 148,591 |
| Kansas | 117,017 | 120,593 | 122,917 | 125,481 | 127,045 | 126,920 | 128,024 | 129,973 | 129,334 | 131,412 |
| Kentucky | 199,042 | 222,162 | 224,322 | 231,081 | 231,352 | 237,553 | 243,886 | 252,454 | 257,205 | 255,264 |
| Louisiana | 213,819 | 234,663 | 235,574 | 237,390 | 232,942 | 223,794 | 237,154 | 243,724 | 248,183 | 253,774 |
| Maine | 54,963 | 63,013 | 64,361 | 66,278 | 67,895 | 68,128 | 69,030 | 68,547 | 66,705 | 67,401 |
| Maryland | 179,835 | 214,989 | 211,265 | 204,988 | 195,489 | 199,012 | 208,038 | 234,162 | 244,595 | 251,754 |
| Massachusetts | 286,332 | 310,455 | 299,734 | 293,217 | 280,333 | 268,179 | 263,152 | 271,657 | 275,984 | 291,062 |
| Michigan | 366,349 | 435,455 | 443,753 | 457,401 | 456,972 | 452,461 | 452,367 | 468,675 | 497,195 | 506,259 |
| Minnesota | 170,808 | 178,018 | 181,315 | 187,164 | 192,488 | 194,935 | 200,918 | 209,469 | 210,382 | 208,364 |
| Mississippi | 142,662 | 162,934 | 170,698 | 181,599 | 185,149 | 181,575 | 183,952 | 185,626 | 182,535 | 183,965 |
| Missouri | 281,059 | 298,509 | 298,805 | 299,996 | 297,554 | 293,724 | 300,576 | 315,642 | 317,278 | 320,454 |
| Montana | 40,505 | 40,770 | 40,831 | 41,542 | 41,854 | 42,343 | 44,208 | 45,697 | 42,880 | 40,952 |
| Nebraska | 69,299 | 70,113 | 72,975 | 75,630 | 77,188 | 76,841 | 76,960 | 74,217 | 71,921 | 71,577 |
| Nevada | 37,478 | 49,254 | 52,175 | 54,509 | 55,150 | 48,369 | 49,613 | 51,836 | 56,622 | 57,345 |
| New Hampshire | 39,103 | 42,746 | 43,834 | 44,758 | 42,918 | 42,054 | 45,712 | 48,206 | 46,282 | 46,304 |
| New Jersey | 338,509 | 385,145 | 375,353 | 371,173 | 364,034 | 373,224 | 372,063 | 374,250 | 389,938 | 404,035 |
| New Mexico | 50,391 | 50,334 | 49,758 | 53,329 | 52,913 | 51,459 | 51,085 | 51,396 | 51,469 | 51,533 |
| New York | 723,060 | 797,453 | 796,965 | 798,611 | 787,116 | 777,269 | 750,793 | 761,352 | 771,835 | 780,893 |
| North Carolina | 267,370 | 336,173 | 353,297 | 369,667 | 385,533 | 395,004 | 406,700 | 413,429 | 418,725 | 431,441 |
| North Dakota | 37,543 | 37,014 | 36,807 | 38,272 | 38,332 | 38,847 | 39,672 | 38,764 | 34,707 | 34,645 |
| Ohio | 527,006 | 562,234 | 565,237 | 562,603 | 541,958 | 533,499 | 536,335 | 550,989 | 559,223 | 565,314 |
| Oklahoma | 155,100 | 156,239 | 158,966 | 163,842 | 166,068 | 170,592 | 176,021 | 179,543 | 182,998 | 187,913 |
| Oregon | 106,164 | 105,878 | 106,901 | 111,656 | 111,028 | 100,569 | 91,806 | 98,854 | 102,568 | 102,182 |
| Pennsylvania | 685,403 | 766,535 | 731,542 | 728,572 | 692,290 | 664,002 | 634,802 | 649,458 | 656,105 | 654,661 |
| Rhode Island | 46,578 | 49,740 | 50,739 | 50,498 | 46,484 | 39,625 | 38,489 | 39,658 | 40,229 | 38,506 |
| South Carolina | 112,232 | 156,060 | 163,200 | 171,889 | 184,188 | 194,344 | 204,038 | 213,513 | 216,412 | 218,775 |
| South Dakota | 38,175 | 41,714 | 42,916 | 44,101 | 44,350 | 44,846 | 45,239 | 45,202 | 43,134 | 42,626 |
| Tennessee | 290,371 | 310,335 | 318,600 | 324,380 | 324,831 | 318,793 | 327,423 | 341,212 | 344,524 | 348,700 |
| Texas | 603,621 | 671,734 | 689,627 | 721,006 | 732,255 | 725,166 | 742,628 | 798,667 | 843,945 | 868,784 |
| Utah | 39,963 | 43,819 | 45,418 | 44,513 | 45,698 | 48,898 | 53,003 | 55,207 | 56,244 | 57,928 |
| Vermont | 20,251 | 22,815 | 23,001 | 23,456 | 22,585 | 23,133 | 24,014 | 24,778 | 22,658 | 22,690 |
| Virginia | 240,165 | 271,620 | 274,285 | 285,721 | 286,752 | 289,195 | 295,790 | 305,346 | 310,602 | 315,181 |
| Washington | 157,942 | 157,146 | 160,146 | 158,264 | 152,867 | 148,620 | 153,660 | 162,197 | 166,846 | 167,102 |
| West Virginia | 111,305 | 124,293 | 125,954 | 131,334 | 131,473 | 134,483 | 134,585 | 135,458 | 132,356 | 131,953 |
| Wisconsin | 217,727 | 227,774 | 226,898 | 232,721 | 233,103 | 233,432 | 238,572 | 240,711 | 243,774 | 244,100 |
| Wyoming | 15,255 | 16,009 | 15,912 | 16,557 | 17,256 | 17,429 | 18,764 | 18,932 | 18,044 | 16,416 |
| Outlying areas | | | | | | | | | | |
| Puerto Rico | 93,436 | 111,950 | 115,410 | 120,547 | 123,752 | 130,209 | 137,315 | 138,713 | 139,682 | 134,979 |
| Virgin Islands | 528 | 1,374 | 1,234 | 1,402 | 1,569 | 1,511 | 1,552 | 1,468 | 1,571 | 1,641 |
| Unknown | 978 | 1,012 | 1,283 | 1,351 | 1,543 | 1,835 | 1,936 | 2,265 | 2,485 | 2,061 |

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Discharge data for fiscal year 2003 are final as of June 2004.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B9—Supplementary Medical Insurance: Number of reimbursed bills, charges, and amount reimbursed, by type of beneficiary and type of service, for claims incurred 1995–2003 (in thousands)

| Year ^a | All services ^b | Physicians' services | | | Outpatient hospital services | Independent laboratory services | Home health services ^c | All other services |
|---|---------------------------|----------------------|-----------------------|----------------------|------------------------------|---------------------------------|-----------------------------------|--------------------|
| | | Total | Surgical ^d | Medical ^d | | | | |
| Persons aged 65 or older | | | | | | | | |
| <i>Number of bills</i> | | | | | | | | |
| 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 | 52,801 | 42,715 | 4,632 | 83,311 |
| 1999 | ^e 486,296 | 429,299 | 45,496 | 383,803 | 51,498 | ^e | 5,499 | ^e |
| 2000 | -- | -- | -- | -- | -- | -- | -- | -- |
| 2001 | -- | -- | -- | -- | -- | -- | -- | -- |
| 2002 | -- | -- | -- | -- | -- | -- | -- | -- |
| 2003 | -- | -- | -- | -- | -- | -- | -- | -- |
| <i>Allowed charges ^f (dollars)</i> | | | | | | | | |
| 1995 | 84,329,200 | 39,754,745 | 13,734,400 | 26,020,048 | 31,785,243 | 1,802,713 | 288,835 | 10,697,664 |
| 1996 | 88,175,258 | 39,483,654 | 13,164,645 | 26,318,914 | 34,958,600 | 1,634,475 | 320,273 | 11,778,256 |
| 1997 | 92,896,022 | 40,447,602 | 12,953,314 | 27,493,847 | 37,668,927 | 1,490,474 | 335,544 | 12,953,475 |
| 1998 | 101,834,121 | 41,703,978 | 12,061,669 | 29,634,502 | 38,742,665 | 1,333,197 | 6,049,738 | 14,004,543 |
| 1999 | 105,655,913 | 43,770,755 | 12,080,067 | 31,637,737 | 40,236,989 | 1,264,423 | 6,874,018 | 13,509,728 |
| 2000 | 114,436,628 | 48,332,889 | 12,358,986 | 35,902,761 | 44,205,457 | 1,583,463 | 5,548,445 | 14,766,374 |
| 2001 | 131,252,782 | 55,171,870 | 13,091,543 | 40,923,161 | 52,831,077 | 1,859,485 | 4,160,513 | 17,229,837 |
| 2002 | 152,809,122 | 58,783,402 | -- | -- | 67,391,151 | 2,101,369 | 4,344,154 | 20,189,046 |
| 2003 | 172,671,317 | 63,559,176 | -- | -- | 79,760,992 | 2,246,105 | 4,687,920 | 22,417,124 |
| <i>Amount reimbursed ^g (dollars)</i> | | | | | | | | |
| 1995 | 49,728,498 | 31,117,714 | 10,833,812 | 20,283,666 | 10,090,546 | 1,751,376 | 206,817 | 6,562,045 |
| 1996 | 50,800,415 | 30,914,665 | 10,381,197 | 20,533,397 | 10,732,301 | 1,583,843 | 228,643 | 7,340,963 |
| 1997 | 52,436,342 | 31,683,693 | 10,218,613 | 21,464,753 | 11,208,118 | 1,440,441 | 234,529 | 7,869,561 |
| 1998 | 56,704,083 | 32,668,073 | 9,517,777 | 23,144,124 | 10,685,651 | 1,278,720 | 4,261,053 | 7,810,586 |
| 1999 | 58,239,867 | 34,423,899 | 9,523,625 | 24,857,734 | 10,364,021 | 1,209,283 | 4,836,740 | 7,405,924 |
| 2000 | 62,306,221 | 37,962,804 | 9,743,222 | 28,166,179 | 10,674,291 | 1,502,927 | 4,174,537 | 7,991,662 |
| 2001 | 71,314,045 | 43,354,148 | 10,351,499 | 32,120,569 | 12,938,887 | 1,759,409 | 4,039,929 | 9,221,672 |
| 2002 | 77,636,886 | 46,212,868 | -- | -- | 14,728,213 | 1,983,401 | 4,300,505 | 10,411,899 |
| 2003 | 84,356,092 | 50,024,454 | -- | -- | 16,430,955 | 2,120,382 | 4,467,234 | 11,313,067 |
| Disabled beneficiaries | | | | | | | | |
| <i>Number of bills</i> | | | | | | | | |
| 1995 | 77,224 | 49,829 | 4,261 | 45,568 | 11,152 | 7,758 | 0 | 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 | 0 | 10,323 |
| 1998 | 89,890 | 58,244 | 4,991 | 53,253 | 12,639 | 6,776 | 475 | 11,756 |
| 1999 | ^e 72,288 | 59,281 | 5,042 | 54,239 | 12,413 | ^e | 594 | ^e |
| 2000 | -- | -- | -- | -- | -- | -- | -- | -- |
| 2001 | -- | -- | -- | -- | -- | -- | -- | -- |
| 2002 | -- | -- | -- | -- | -- | -- | -- | -- |
| 2003 | -- | -- | -- | -- | -- | -- | -- | -- |
| <i>Allowed charges ^f (dollars)</i> | | | | | | | | |
| 1995 | 14,392,879 | 5,005,328 | 1,392,181 | 3,613,063 | 7,691,775 | 280,673 | 79 | 1,415,024 |
| 1996 | 15,902,246 | 5,168,553 | 1,401,285 | 3,767,217 | 8,682,133 | 284,031 | 194 | 1,767,335 |
| 1997 | 17,062,457 | 5,399,380 | 1,409,583 | 3,989,586 | 9,394,843 | 281,459 | 575 | 1,986,200 |
| 1998 | 18,745,611 | 5,828,235 | 1,401,045 | 4,421,251 | 9,551,182 | 252,548 | 721,512 | 2,392,134 |
| 1999 | 20,044,042 | 6,298,631 | 1,453,807 | 4,812,231 | 10,127,713 | 245,521 | 867,306 | 2,504,871 |
| 2000 | 22,088,612 | 7,139,478 | 1,526,798 | 5,582,913 | 11,117,403 | 294,743 | 729,305 | 2,807,683 |
| 2001 | 25,851,633 | 8,338,582 | 1,631,945 | 6,383,077 | 13,297,005 | 343,140 | 556,071 | 3,316,835 |
| 2002 | 32,733,223 | 9,227,564 | -- | -- | 18,508,966 | 401,935 | 603,808 | 3,990,950 |
| 2003 | 40,131,694 | 10,442,995 | -- | -- | 24,080,585 | 442,148 | 667,485 | 4,498,481 |

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B9—Supplementary Medical Insurance: Number of reimbursed bills, charges, and amount reimbursed, by type of beneficiary and type of service, for claims incurred 1995–2003 (in thousands)—Continued

| Year ^a | All services ^b | Physicians' services | | | Outpatient hospital services | Independent laboratory services | Home health services ^c | All other services |
|---|---------------------------|----------------------|-----------------------|----------------------|------------------------------|---------------------------------|-----------------------------------|--------------------|
| | | Total | Surgical ^d | Medical ^d | | | | |
| <i>Amount reimbursed ^g (dollars)</i> | | | | | | | | |
| 1995 | 8,408,407 | 3,791,282 | 1,088,310 | 2,702,905 | 3,331,670 | 275,955 | 52 | 1,009,448 |
| 1996 | 9,099,749 | 3,908,973 | 1,095,977 | 2,812,960 | 3,652,751 | 278,816 | 142 | 1,259,067 |
| 1997 | 9,592,738 | 4,093,648 | 1,103,074 | 2,990,428 | 3,839,715 | 276,057 | 454 | 1,382,864 |
| 1998 | 10,445,805 | 4,409,930 | 1,095,140 | 3,310,214 | 3,777,955 | 246,337 | 497,372 | 1,514,211 |
| 1999 | 11,001,811 | 4,781,935 | 1,135,375 | 3,621,070 | 3,840,930 | 239,191 | 595,048 | 1,544,707 |
| 2000 | 11,934,550 | 5,418,442 | 1,192,908 | 4,203,799 | 4,005,611 | 286,661 | 528,835 | 1,695,001 |
| 2001 | 13,844,004 | 6,332,536 | 1,278,008 | 4,823,352 | 4,724,398 | 333,141 | 487,062 | 1,966,867 |
| 2002 | 15,668,015 | 7,021,181 | -- | -- | 5,419,005 | 389,855 | 538,816 | 2,299,158 |
| 2003 | 17,552,967 | 7,985,917 | -- | -- | 6,006,924 | 428,901 | 580,471 | 2,550,754 |

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: -- = not available.

- 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. Because of provisions in the Balanced Budget Act, beginning in 1998, Part A now has a 100-visit limit, and additional home health services will be billed under Part B.
- 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. Total for "All services" excludes "Independent laboratory services" and "All other services"; for these services, data are not available because of programmatic problems.
- f. Includes physician or supplier allowed charges as determined by the carrier and amounts actually billed by providers for outpatient hospital and home health services.
- g. Amount reimbursed to or on behalf of the beneficiary—generally 80 percent of the allowed charges, once the beneficiary has satisfied the deductible in the current year. Some radiology and pathology services are reimbursed at a 100 percent rate, regardless of the beneficiary's deductible status.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.B Medicare: Enrollment, Utilization, and Reimbursement

**Table 8.B10—Supplementary Medical Insurance:
Claims received by carriers and assignment rates,
1969–2003**

| Year | Total number of claims (thousands) | Net assignment rate ^a (percent) |
|------|---------------------------------------|---|
| 1969 | 37,542 | 61.5 |
| 1970 | 42,148 | 60.8 |
| 1971 | 46,572 | 58.5 |
| 1972 | 51,041 | 54.9 |
| 1973 | 57,007 | 52.7 |
| 1974 | 68,307 | 51.9 |
| 1975 | 79,980 | 51.8 |
| 1976 | 91,624 | 50.5 |
| 1977 | 105,339 | 50.5 |
| 1978 | 117,886 | 50.6 |
| 1979 | 132,098 | 51.3 |
| 1980 | 150,048 | 51.5 |
| 1981 | 167,154 | 52.3 |
| 1982 | 182,440 | 53.0 |
| 1983 | 204,122 | 53.9 |
| 1984 | 238,362 | 59.0 |
| 1985 | 279,559 | 68.5 |
| 1986 | 306,714 | 68.0 |
| 1987 | 346,551 | 73.1 |
| 1988 | 386,763 | 77.3 |
| 1989 | 421,305 | 79.7 |
| 1990 | 474,226 | 81.1 |
| 1991 | 517,123 | 83.1 |
| 1992 | 554,619 | 86.2 |
| 1993 | 583,863 | 90.1 |
| 1994 | 622,514 | 92.8 |
| 1995 | 647,855 | 94.7 |
| 1996 | 678,030 | 95.9 |
| 1997 | 688,891 | 96.7 |
| 1998 | 697,523 | 97.3 |
| 1999 | 703,227 | 97.6 |
| 2000 | 720,493 | 97.9 |
| 2001 | 766,758 | 98.1 |
| 2002 | 821,993 | 98.4 |
| 2003 | 860,746 | 98.5 |

SOURCE: Centers for Medicare & Medicaid Services.

a. Represents the number of assigned claims as a percentage of claims received.

CONTACT: Maria Diacogiannis (410) 786-0178.

Table 8.B11—Supplementary Medical Insurance: Reasonable charge determination for claims assigned and unassigned for aged and disabled persons, 1971–2003

| Year | Claims approved | | Charges before reduction | |
|--------------------------|--------------------|--------------------|------------------------------|--------------------|
| | Number (thousands) | Percentage reduced | Amount (millions of dollars) | Percentage reduced |
| <i>Assigned claims</i> | | | | |
| 1971 | 25,919 | 44.5 | 1,571 | 11.1 |
| 1972 | 26,798 | 47.5 | 1,630 | 10.9 |
| 1973 | 28,376 | 55.6 | 1,751 | 11.9 |
| 1974 | 33,295 | 64.5 | 2,194 | 14.3 |
| 1975 | 39,218 | 70.8 | 2,716 | 17.8 |
| 1976 | 44,065 | 74.3 | 3,261 | 19.9 |
| 1977 | 50,260 | 72.8 | 3,936 | 19.4 |
| 1978 | 56,493 | 73.6 | 4,678 | 19.9 |
| 1979 | 64,051 | 77.0 | 5,746 | 21.2 |
| 1980 | 73,068 | 80.8 | 7,303 | 22.7 |
| 1981 ^a | 80,127 | 82.8 | 8,868 | 24.0 |
| 1982 | 91,615 | 83.3 | 11,315 | 24.3 |
| 1983 | 103,139 | 81.0 | 13,657 | 23.6 |
| 1984 | 128,559 | 80.8 | 16,571 | 25.4 |
| 1985 | 176,956 | 81.7 | 22,008 | 27.4 |
| 1986 | 191,139 | 82.8 | 24,662 | 28.4 |
| 1987 | 234,488 | 83.4 | 31,179 | 28.0 |
| 1988 | 271,225 | 85.6 | 37,275 | 29.8 |
| 1989 | 304,649 | 86.9 | 44,567 | 31.0 |
| 1990 | 341,220 | 87.5 | 51,012 | 32.9 |
| 1991 | 384,168 | 87.4 | 60,057 | 36.2 |
| 1992 | 412,924 | 86.2 | 67,667 | 39.7 |
| 1993 | 460,761 | 88.8 | 76,186 | 42.8 |
| 1994 | 508,981 | 87.7 | 85,170 | 42.5 |
| 1995 | 539,630 | 86.4 | 93,300 | 42.3 |
| 1996 | 550,587 | 87.1 | 97,744 | 44.9 |
| 1997 | 566,591 | 87.4 | 103,389 | 45.9 |
| 1998 | 575,799 | 87.9 | 106,947 | 46.9 |
| 1999 | 590,463 | 88.9 | 114,981 | 47.8 |
| 2000 | 615,862 | 87.9 | 126,391 | 47.7 |
| 2001 | 665,196 | 87.5 | 145,641 | 48.0 |
| 2002 | 722,826 | 87.7 | 152,373 | 56.3 |
| 2003 | 759,783 | 88.9 | 189,920 | 52.0 |
| <i>Unassigned claims</i> | | | | |
| 1971 | 17,955 | 57.6 | 1,348 | 12.5 |
| 1972 | 21,286 | 59.3 | 1,608 | 12.0 |
| 1973 | 24,691 | 66.4 | 1,886 | 12.6 |
| 1974 | 30,492 | 72.7 | 2,401 | 14.7 |
| 1975 | 36,182 | 77.4 | 2,973 | 17.7 |
| 1976 | 42,100 | 78.9 | 3,591 | 19.8 |
| 1977 | 48,619 | 77.1 | 4,233 | 19.0 |
| 1978 | 53,700 | 77.5 | 4,749 | 19.2 |
| 1979 | 59,961 | 80.9 | 5,596 | 20.7 |
| 1980 | 68,113 | 84.3 | 6,836 | 22.5 |
| 1981 ^a | 72,765 | 85.8 | 7,870 | 23.8 |
| 1982 | 80,253 | 85.4 | 9,545 | 23.9 |
| 1983 | 87,436 | 82.7 | 10,885 | 22.9 |
| 1984 | 88,594 | 83.7 | 11,216 | 24.2 |
| 1985 | 77,965 | 84.6 | 10,059 | 25.9 |
| 1986 | 87,121 | 85.0 | 10,757 | 26.9 |
| 1987 | 83,116 | 82.4 | 10,258 | 24.7 |
| 1988 | 76,503 | 86.4 | 9,005 | 25.0 |
| 1989 | 74,947 | 90.1 | 8,971 | 25.0 |

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B11—Supplementary Medical Insurance: Reasonable charge determination for claims assigned and unassigned for aged and disabled persons, 1971–2003—Continued

| Year | Claims approved | | Charges before reduction | |
|------|--------------------|--------------------|------------------------------|--------------------|
| | Number (thousands) | Percentage reduced | Amount (millions of dollars) | Percentage reduced |
| 1990 | 77,746 | 90.4 | 8,789 | 25.3 |
| 1991 | 77,520 | 91.3 | 7,884 | 23.1 |
| 1992 | 66,403 | 82.9 | 6,215 | 18.5 |
| 1993 | 51,080 | 86.5 | 4,267 | 16.5 |
| 1994 | 39,364 | 86.4 | 3,255 | 16.3 |
| 1995 | 29,975 | 83.4 | 2,543 | 15.4 |
| 1996 | 22,819 | 84.4 | 1,952 | 15.8 |
| 1997 | 18,615 | 84.4 | 1,650 | 16.4 |
| 1998 | 15,172 | 82.3 | 1,382 | 17.1 |
| 1999 | 13,834 | 81.3 | 1,316 | 17.7 |
| 2000 | 12,755 | 78.6 | 1,287 | 18.1 |
| 2001 | 12,085 | 76.7 | 1,252 | 18.2 |
| 2002 | 11,352 | 79.8 | 1,107 | 17.2 |
| 2003 | 11,100 | 82.1 | 1,066 | 15.9 |

SOURCE: Centers for Medicare & Medicaid Services.

a. Excludes Texas Blue-Shield plan from July to December 1981.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B12—Supplementary Medical Insurance: State buy-ins, by state or other area, selected years 1991–2004

| State or area | 1991 | 1995 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|--------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| All areas | 3,640,121 | 4,705,625 | 5,008,860 | 5,109,228 | 5,273,573 | 5,425,048 | 5,615,326 | 5,810,613 | 6,145,589 | 6,305,467 |
| Alabama | 97,601 | 116,916 | 122,720 | 121,990 | 128,875 | 136,860 | 141,436 | 144,603 | 162,912 | 164,499 |
| Alaska | 4,539 | 6,193 | 6,835 | 7,093 | 7,799 | 8,486 | 8,832 | 9,324 | 10,008 | 10,318 |
| Arizona | 28,650 | 44,236 | 49,213 | 51,141 | 53,450 | 57,712 | 61,989 | 74,678 | 91,782 | 95,804 |
| Arkansas | 64,996 | 77,660 | 79,176 | 78,514 | 79,508 | 79,606 | 80,231 | 82,040 | 86,597 | 86,181 |
| California | 646,108 | 747,814 | 769,335 | 776,832 | 793,510 | 818,846 | 848,361 | 892,260 | 950,503 | 977,676 |
| Colorado | 36,470 | 46,660 | 50,749 | 52,175 | 53,964 | 55,325 | 56,934 | 57,987 | 59,114 | 61,140 |
| Connecticut | 23,535 | 48,047 | 50,668 | 51,335 | 52,134 | 53,141 | 55,933 | 60,083 | 65,223 | 66,664 |
| Delaware | 4,499 | 6,645 | 8,446 | 8,900 | 8,231 | 10,737 | 12,094 | 13,252 | 15,224 | 16,081 |
| District of Columbia | 12,791 | 14,152 | 14,482 | 14,582 | 13,181 | 14,233 | 14,621 | 15,065 | 15,079 | 15,586 |
| Florida | 196,992 | 271,430 | 304,791 | 313,744 | 324,172 | 342,109 | 358,642 | 369,092 | 389,599 | 406,006 |
| Georgia | 128,976 | 160,380 | 168,267 | 171,047 | 171,638 | 176,596 | 181,312 | 186,466 | 193,807 | 199,524 |
| Hawaii | 11,529 | 16,695 | 18,751 | 19,226 | 19,962 | 20,326 | 21,090 | 21,748 | 22,904 | 22,988 |
| Idaho | 9,127 | 12,931 | 14,296 | 14,909 | 15,868 | 17,081 | 18,550 | 19,725 | 21,255 | 22,291 |
| Illinois | 94,434 | 137,571 | 144,684 | 145,976 | 149,850 | 155,743 | 161,141 | 163,368 | 175,822 | 189,044 |
| Indiana | 60,297 | 76,460 | 76,846 | 81,184 | 82,901 | 87,543 | 91,311 | 95,553 | 102,654 | 105,011 |
| Iowa | 41,170 | 48,517 | 49,344 | 49,844 | 50,954 | 51,976 | 52,891 | 54,536 | 56,920 | 58,023 |
| Kansas | 26,960 | 34,708 | 37,486 | 39,008 | 40,365 | 41,217 | 42,126 | 43,123 | 44,602 | 46,175 |
| Kentucky | 76,456 | 97,978 | 105,188 | 106,537 | 111,789 | 117,697 | 118,641 | 122,096 | 126,690 | 126,343 |
| Louisiana | 87,570 | 112,090 | 114,482 | 115,031 | 116,602 | 117,179 | 117,867 | 120,478 | 127,340 | 132,498 |
| Maine | 22,176 | 29,453 | 32,168 | 33,006 | 35,211 | 36,946 | 38,161 | 39,575 | 42,269 | 43,800 |
| Maryland | 48,028 | 58,865 | 59,745 | 61,669 | 64,086 | 65,372 | 68,010 | 70,224 | 73,994 | 75,366 |
| Massachusetts | 89,163 | 125,859 | 132,874 | 138,796 | 143,779 | 152,587 | 160,198 | 164,510 | 167,681 | 170,689 |
| Michigan | 91,340 | 123,948 | 130,682 | 135,769 | 139,411 | 145,172 | 148,760 | 152,758 | 158,998 | 161,519 |
| Minnesota | 39,366 | 52,192 | 56,486 | 57,559 | 59,926 | 63,607 | 66,874 | 70,873 | 75,080 | 77,499 |
| Mississippi | 90,530 | 108,577 | 106,461 | 106,336 | 107,176 | 107,495 | 116,503 | 125,832 | 131,706 | 133,337 |
| Missouri | 55,116 | 72,659 | 79,847 | 81,841 | 85,329 | 88,343 | 91,244 | 93,512 | 99,127 | 103,449 |
| Montana | 10,058 | 11,031 | 11,825 | 11,882 | 12,274 | 12,828 | 13,120 | 13,359 | 13,889 | 13,917 |
| Nebraska | 11,358 | 16,146 | 17,321 | 18,029 | 19,064 | 20,520 | 21,121 | 22,120 | 22,922 | 23,082 |
| Nevada | 8,657 | 14,227 | 16,435 | 17,191 | 18,322 | 19,155 | 20,709 | 22,207 | 24,587 | 26,977 |
| New Hampshire | 3,807 | 5,405 | 6,119 | 6,295 | 6,875 | 7,434 | 8,866 | 9,231 | 10,120 | 10,732 |
| New Jersey | 95,795 | 122,923 | 135,109 | 137,598 | 143,024 | 146,705 | 149,303 | 151,644 | 155,377 | 153,231 |
| New Mexico | 22,246 | 29,855 | 33,472 | 34,411 | 36,023 | 37,330 | 39,275 | 41,263 | 44,534 | 44,642 |
| New York | 255,952 | 325,882 | 352,129 | 363,331 | 372,824 | 369,479 | 395,830 | 409,388 | 432,681 | 448,373 |
| North Carolina | 117,656 | 186,328 | 204,551 | 210,388 | 216,563 | 223,402 | 228,997 | 233,229 | 240,422 | 241,543 |
| North Dakota | 4,639 | 5,560 | 5,684 | 5,612 | 5,758 | 5,908 | 6,275 | 6,317 | 6,541 | 6,560 |
| Ohio | 112,598 | 164,044 | 178,365 | 180,172 | 181,407 | 171,139 | 176,602 | 182,821 | 191,295 | 195,792 |
| Oklahoma | 51,457 | 60,080 | 62,965 | 63,142 | 66,115 | 67,413 | 67,787 | 68,905 | 70,761 | 72,758 |
| Oregon | 28,537 | 43,642 | 49,553 | 51,392 | 55,896 | 59,169 | 62,910 | 66,255 | 68,421 | 69,610 |
| Pennsylvania | 127,519 | 162,788 | 173,142 | 179,295 | 198,492 | 206,468 | 215,351 | 218,691 | 229,814 | 232,885 |
| Rhode Island | 10,585 | 15,517 | 17,321 | 17,729 | 18,513 | 19,787 | 21,620 | 22,928 | 25,146 | 25,361 |
| South Carolina | 78,701 | 95,970 | 101,455 | 104,111 | 110,032 | 112,232 | 116,288 | 118,635 | 117,997 | 118,393 |
| South Dakota | 9,399 | 12,346 | 12,778 | 12,791 | 13,112 | 13,146 | 13,237 | 13,542 | 14,231 | 14,045 |
| Tennessee | 116,861 | 148,391 | 164,010 | 171,653 | 178,707 | 182,342 | 184,570 | 187,438 | 203,567 | 208,678 |
| Texas | 234,169 | 314,991 | 336,801 | 339,648 | 350,959 | 360,191 | 370,598 | 380,954 | 410,248 | 423,560 |
| Utah | 10,263 | 13,506 | 14,589 | 14,900 | 15,569 | 16,231 | 16,712 | 17,497 | 18,548 | 19,361 |
| Vermont | 8,223 | 12,428 | 13,048 | 13,197 | 13,598 | 13,754 | 14,296 | 14,650 | 15,016 | 15,079 |
| Virginia | 77,898 | 102,964 | 108,365 | 108,427 | 111,404 | 113,259 | 113,898 | 116,496 | 120,711 | 124,996 |
| Washington | 54,774 | 71,531 | 83,128 | 89,419 | 91,976 | 97,390 | 94,852 | 99,552 | 105,516 | 108,780 |
| West Virginia | 28,086 | 39,720 | 43,572 | 43,019 | 45,406 | 46,305 | 47,774 | 47,547 | 50,008 | 51,365 |
| Wisconsin | 67,516 | 75,247 | 76,109 | 74,429 | 74,681 | 74,101 | 73,875 | 75,179 | 78,124 | 79,889 |
| Wyoming | 3,505 | 5,265 | 5,781 | 5,963 | 6,183 | 6,444 | 6,746 | 7,087 | 7,422 | 7,454 |
| Outlying areas | | | | | | | | | | |
| Guam | 443 | 669 | 682 | 650 | 583 | 417 | 385 | 339 | 339 | 375 |
| Northern Mariana Islands | 273 | 314 | 322 | 311 | 335 | 342 | 367 | 372 | 358 | 340 |
| Virgin Islands | 727 | 219 | 207 | 199 | 207 | 204 | 210 | 206 | 194 | 178 |

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/or Supplementary Medical Insurance: Number of facilities and beds, by type of participating provider, December 1967–2003, selected years

| Year | Hospitals | | | Skilled nursing facilities | Home health agencies | Clinical Laboratory Improvement Act/ independent laboratories |
|-------------------|---------------|----------------------|-------------|----------------------------|----------------------|---|
| | All hospitals | General ^a | Psychiatric | | | |
| Facilities | | | | | | |
| 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 | ^b 156,117 |
| 1994 | 6,414 | 5,705 | 709 | 12,584 | 7,827 | ^b 151,422 |
| 1995 | 6,376 | 5,694 | 682 | 13,452 | 8,447 | ^b 156,511 |
| 1996 | 6,273 | 5,627 | 646 | 14,177 | 9,850 | ^b 157,876 |
| 1997 | 6,293 | 5,639 | 654 | 14,860 | 10,807 | ^b 164,054 |
| 1998 | 6,116 | 5,514 | 602 | 15,032 | 9,330 | ^b 166,817 |
| 1999 | 5,985 | 5,415 | 570 | 14,913 | 7,857 | ^b 171,018 |
| 2000 | 6,031 | 5,512 | 519 | 14,841 | 7,099 | ^b 168,333 |
| 2001 | 6,002 | 5,508 | 494 | 14,755 | 6,813 | ^b 173,807 |
| 2002 | 6,024 | 5,537 | 487 | 14,838 | 6,928 | ^b 176,947 |
| 2003 | 6,057 | 5,579 | 478 | 14,939 | 7,138 | ^b 184,466 |
| Beds | | | | | | |
| 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 | ... | ... |

(Continued)

Table 8.C1—Hospital Insurance and/or Supplementary Medical Insurance: Number of facilities and beds, by type of participating provider, December 1967–2003, selected years—Continued

| Year | Hospitals | | | Skilled nursing facilities | Home health agencies | Clinical Laboratory Improvement Act/ independent laboratories |
|------|---------------|----------------------|-------------|----------------------------|----------------------|--|
| | All hospitals | General ^a | Psychiatric | | | |
| 1995 | 1,056,454 | 970,143 | 86,311 | 657,225 | ... | ... |
| 1996 | 1,038,105 | 955,604 | 82,501 | 671,839 | ... | ... |
| 1997 | 1,037,356 | 954,372 | 82,984 | 684,977 | ... | ... |
| 1998 | 1,012,168 | 934,635 | 77,533 | 722,626 | ... | ... |
| 1999 | 993,901 | 920,326 | 73,575 | 836,720 | ... | ... |
| 2000 | 982,616 | 913,806 | 68,810 | 939,364 | ... | ... |
| 2001 | 968,761 | 901,688 | 67,073 | 1,104,978 | ... | ... |
| 2002 | 957,898 | 897,076 | 60,822 | 1,260,625 | ... | ... |
| 2003 | 951,628 | 894,457 | 57,171 | 1,371,815 | ... | ... |

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: ... = not applicable; -- = not available.

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.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.C Medicare: Participating Facilities

Table 8.C2—Hospital Insurance: Number of participating hospitals and beds per 1,000 enrollees, by state or other area, December 2003

| Census division and state or area | All hospitals | | Short-stay | | | Long-stay | |
|-----------------------------------|---------------|---------|------------|---------|---------------------------------------|-----------|---------|
| | Hospitals | Beds | Hospitals | Beds | Beds per 1,000 enrollees ^a | Hospitals | Beds |
| Total | | | | | | | |
| All areas | 6,057 | 951,628 | 4,101 | 827,475 | 20.4 | 1,956 | 124,153 |
| United States | 5,993 | 940,495 | 4,043 | 817,490 | 20.6 | 1,950 | 123,005 |
| New England | 261 | 43,647 | 177 | 32,724 | 15.2 | 90 | 10,710 |
| Connecticut | 46 | 10,372 | 32 | 8,295 | 16.0 | 14 | 2,077 |
| Maine | 41 | 4,063 | 28 | 3,475 | 15.4 | 13 | 588 |
| Massachusetts | 113 | 19,420 | 68 | 13,154 | 13.6 | 45 | 6,266 |
| New Hampshire | 30 | 3,389 | 21 | 2,765 | 15.4 | 9 | 624 |
| Rhode Island | 15 | 3,785 | 11 | 2,910 | 17.1 | 4 | 875 |
| Vermont | 16 | 2,048 | 11 | 1,768 | 19.2 | 5 | 280 |
| Middle Atlantic | 605 | 150,837 | 467 | 128,837 | 21.7 | 151 | 19,827 |
| New Jersey | 107 | 31,338 | 78 | 27,281 | 22.7 | 29 | 4,057 |
| New York | 252 | 73,989 | 204 | 65,663 | 24.9 | 48 | 8,326 |
| Pennsylvania | 246 | 41,034 | 172 | 33,590 | 15.9 | 74 | 7,444 |
| East North Central | 900 | 166,610 | 645 | 149,635 | 23.1 | 281 | 16,448 |
| Illinois | 216 | 46,872 | 158 | 43,132 | 26.3 | 58 | 3,740 |
| Indiana | 157 | 21,619 | 94 | 18,830 | 21.5 | 63 | 2,789 |
| Michigan | 175 | 29,984 | 129 | 27,133 | 18.8 | 46 | 2,851 |
| Ohio | 211 | 46,129 | 147 | 41,619 | 24.3 | 64 | 4,510 |
| Wisconsin | 141 | 19,023 | 91 | 16,465 | 20.5 | 50 | 2,558 |
| West North Central | 766 | 78,360 | 430 | 65,758 | 22.6 | 377 | 13,170 |
| Iowa | 119 | 11,833 | 60 | 10,134 | 21.0 | 59 | 1,699 |
| Kansas | 152 | 11,166 | 72 | 8,823 | 22.5 | 80 | 2,343 |
| Minnesota | 147 | 16,684 | 85 | 13,828 | 20.5 | 62 | 2,856 |
| Missouri | 137 | 24,134 | 98 | 21,817 | 24.8 | 39 | 2,317 |
| Nebraska | 94 | 6,669 | 26 | 4,505 | 17.6 | 68 | 2,164 |
| North Dakota | 50 | 3,276 | 17 | 2,363 | 23.0 | 33 | 913 |
| South Dakota | 67 | 3,409 | 31 | 2,531 | 20.8 | 36 | 878 |
| South Atlantic | 890 | 171,542 | 656 | 151,228 | 19.3 | 242 | 20,786 |
| Delaware | 10 | 2,261 | 5 | 1,892 | 15.9 | 5 | 369 |
| District of Columbia | 14 | 4,519 | 7 | 3,527 | 49.1 | 7 | 992 |
| Florida | 235 | 53,517 | 179 | 48,696 | 16.7 | 56 | 4,821 |
| Georgia | 176 | 24,902 | 118 | 21,416 | 22.2 | 58 | 3,486 |
| Maryland | 65 | 16,104 | 47 | 13,108 | 19.5 | 18 | 2,996 |
| North Carolina | 139 | 25,993 | 108 | 22,722 | 18.9 | 31 | 3,271 |
| South Carolina | 76 | 12,637 | 59 | 11,358 | 18.8 | 17 | 1,279 |
| Virginia | 109 | 21,236 | 83 | 18,745 | 20.0 | 26 | 2,491 |
| West Virginia | 66 | 9,388 | 42 | 8,307 | 23.9 | 24 | 1,081 |
| East South Central | 495 | 74,985 | 388 | 68,529 | 25.7 | 117 | 6,980 |
| Alabama | 122 | 19,921 | 100 | 18,227 | 25.5 | 22 | 1,694 |
| Kentucky | 115 | 17,347 | 76 | 14,877 | 23.1 | 39 | 2,470 |
| Mississippi | 106 | 12,834 | 85 | 12,065 | 27.7 | 21 | 769 |
| Tennessee | 152 | 24,781 | 117 | 22,734 | 26.2 | 35 | 2,047 |
| West South Central | 969 | 105,638 | 608 | 88,888 | 22.4 | 350 | 17,703 |
| Arkansas | 108 | 10,996 | 68 | 8,788 | 19.4 | 40 | 2,208 |
| Louisiana | 214 | 22,762 | 123 | 18,529 | 30.1 | 91 | 4,233 |
| Oklahoma | 151 | 14,679 | 100 | 12,797 | 24.6 | 51 | 1,882 |
| Texas | 496 | 60,409 | 328 | 51,029 | 21.4 | 168 | 9,380 |
| Mountain | 456 | 45,907 | 283 | 39,206 | 16.8 | 190 | 7,814 |
| Arizona | 89 | 12,833 | 61 | 11,191 | 15.5 | 28 | 1,642 |
| Colorado | 84 | 11,551 | 45 | 9,389 | 19.3 | 39 | 2,162 |
| Idaho | 47 | 3,285 | 18 | 2,557 | 14.4 | 29 | 728 |
| Montana | 64 | 2,907 | 25 | 2,209 | 15.5 | 39 | 698 |
| Nevada | 41 | 5,408 | 24 | 4,595 | 16.9 | 17 | 813 |
| New Mexico | 53 | 5,011 | 38 | 4,394 | 17.8 | 15 | 617 |
| Utah | 48 | 5,091 | 38 | 4,226 | 19.3 | 10 | 865 |
| Wyoming | 30 | 1,511 | 17 | 1,222 | 17.8 | 13 | 289 |

(Continued)

Table 8.C2—Hospital Insurance: Number of participating hospitals and beds per 1,000 enrollees, by state or other area, December 2003—Continued

| Census division and state or area | All hospitals | | Short-stay | | | Long-stay | |
|-----------------------------------|---------------|---------|------------|--------|---------------------------------------|-----------|-------|
| | Hospitals | Beds | Hospitals | Beds | Beds per 1,000 enrollees ^a | Hospitals | Beds |
| Pacific | 651 | 109,239 | 519 | 99,853 | 18.3 | 152 | 9,567 |
| Alaska | 24 | 1,509 | 14 | 1,228 | 25.8 | 10 | 281 |
| California | 438 | 82,366 | 365 | 76,725 | 19.4 | 73 | 5,641 |
| Hawaii | 27 | 2,715 | 17 | 2,250 | 12.9 | 10 | 465 |
| Oregon | 62 | 7,867 | 43 | 7,238 | 14.3 | 19 | 629 |
| Washington | 100 | 13,919 | 60 | 11,368 | 14.8 | 40 | 2,551 |
| Outlying areas | 64 | 11,133 | 58 | 9,985 | 10.8 | 6 | 1,148 |
| Puerto Rico | 59 | 10,448 | 53 | 9,300 | 16.2 | 6 | 1,148 |
| Virgin Islands | 2 | 320 | 2 | 320 | 27.4 | 0 | 0 |
| Other | 3 | 365 | 3 | 365 | 1.1 | 0 | 0 |

SOURCE: Centers for Medicare & Medicaid Services.

a. Based on total number of persons enrolled in the Hospital Insurance program as of July 1, 2003.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.C Medicare: Participating Facilities

Table 8.C3—Hospital Insurance and/or Supplementary Medical Insurance: Number of participating skilled nursing facilities, home health agencies, independent laboratories, and end-stage renal disease facilities, by census division and state or other area, December 2003

| Census division and state or area | Skilled nursing facilities | | | Home health agencies | Clinical Laboratory Improvement Act facilities | End stage renal disease facilities |
|-----------------------------------|----------------------------|-----------|---------------------------------------|----------------------|--|------------------------------------|
| | Number | Beds | Beds per 1,000 enrollees ^a | | | |
| Total | | | | | | |
| All areas | 14,940 | 1,371,845 | 33.7 | 7,141 | 184,513 | 4,469 |
| United States | 14,931 | 1,371,480 | 34.5 | 7,087 | 183,401 | 4,419 |
| New England | 1,047 | 102,081 | 47.5 | 296 | 9,238 | 147 |
| Connecticut | 251 | 30,496 | 58.7 | 83 | 2,564 | 30 |
| Maine | 120 | 6,328 | 28.0 | 31 | 977 | 16 |
| Massachusetts | 468 | 47,894 | 49.7 | 114 | 3,617 | 72 |
| New Hampshire | 71 | 6,057 | 33.8 | 35 | 877 | 10 |
| Rhode Island | 95 | 8,078 | 47.5 | 21 | 767 | 13 |
| Vermont | 42 | 3,228 | 35.0 | 12 | 436 | 6 |
| Middle Atlantic | 1,748 | 247,670 | 41.6 | 526 | 22,759 | 578 |
| New Jersey | 356 | 46,767 | 38.9 | 52 | 5,108 | 108 |
| New York | 669 | 122,285 | 46.3 | 196 | 10,168 | 229 |
| Pennsylvania | 723 | 78,618 | 37.3 | 278 | 7,483 | 241 |
| East North Central | 2,845 | 238,026 | 36.8 | 1,142 | 30,392 | 655 |
| Illinois | 673 | 42,869 | 26.1 | 295 | 7,828 | 158 |
| Indiana | 484 | 39,005 | 44.5 | 161 | 4,541 | 91 |
| Michigan | 395 | 37,910 | 26.3 | 212 | 6,234 | 129 |
| Ohio | 930 | 82,346 | 48.1 | 350 | 8,802 | 185 |
| Wisconsin | 363 | 35,896 | 44.7 | 124 | 2,987 | 92 |
| West North Central | 1,858 | 138,767 | 47.7 | 829 | 13,872 | 336 |
| Iowa | 363 | 25,605 | 53.1 | 180 | 2,393 | 52 |
| Kansas | 263 | 17,321 | 44.1 | 130 | 2,224 | 43 |
| Minnesota | 404 | 36,798 | 54.5 | 222 | 2,316 | 67 |
| Missouri | 478 | 34,152 | 38.8 | 159 | 4,371 | 111 |
| Nebraska | 177 | 12,194 | 47.5 | 63 | 1,434 | 29 |
| North Dakota | 83 | 6,522 | 63.4 | 29 | 501 | 14 |
| South Dakota | 90 | 6,175 | 50.8 | 46 | 633 | 20 |
| South Atlantic | 2,275 | 215,395 | 27.5 | 1,049 | 37,341 | 1,001 |
| Delaware | 37 | 3,572 | 30.0 | 14 | 661 | 15 |
| District of Columbia | 20 | 2,017 | 28.1 | 15 | 435 | 25 |
| Florida | 688 | 70,546 | 24.3 | 420 | 12,460 | 261 |
| Georgia | 334 | 35,130 | 36.4 | 97 | 5,961 | 213 |
| Maryland | 233 | 22,207 | 33.1 | 45 | 3,368 | 114 |
| North Carolina | 420 | 36,439 | 30.3 | 169 | 5,555 | 137 |
| South Carolina | 178 | 15,483 | 25.7 | 71 | 3,071 | 86 |
| Virginia | 244 | 21,349 | 22.7 | 153 | 4,218 | 126 |
| West Virginia | 121 | 8,652 | 24.9 | 65 | 1,612 | 24 |
| East South Central | 990 | 79,602 | 29.9 | 446 | 12,215 | 363 |
| Alabama | 225 | 22,232 | 31.1 | 140 | 3,230 | 104 |
| Kentucky | 295 | 22,443 | 34.9 | 108 | 2,952 | 64 |
| Mississippi | 165 | 14,347 | 32.9 | 60 | 1,900 | 68 |
| Tennessee | 305 | 20,580 | 23.7 | 138 | 4,133 | 127 |
| West South Central | 1,754 | 158,794 | 40.0 | 1,629 | 23,118 | 585 |
| Arkansas | 199 | 15,431 | 34.1 | 173 | 1,831 | 62 |
| Louisiana | 285 | 32,353 | 52.6 | 225 | 3,667 | 127 |
| Oklahoma | 256 | 21,162 | 40.7 | 187 | 2,756 | 65 |
| Texas | 1,014 | 89,848 | 37.8 | 1,044 | 14,864 | 331 |
| Mountain | 733 | 59,750 | 25.6 | 465 | 10,189 | 240 |
| Arizona | 134 | 11,888 | 16.4 | 62 | 2,827 | 90 |
| Colorado | 196 | 17,017 | 35.0 | 128 | 2,349 | 42 |
| Idaho | 77 | 5,775 | 32.5 | 49 | 759 | 7 |
| Montana | 100 | 7,146 | 50.3 | 46 | 652 | 15 |
| Nevada | 42 | 4,818 | 17.7 | 45 | 1,022 | 22 |
| New Mexico | 72 | 4,157 | 16.8 | 57 | 1,124 | 31 |
| Utah | 79 | 6,168 | 28.2 | 46 | 1,117 | 24 |
| Wyoming | 33 | 2,781 | 40.6 | 32 | 339 | 9 |

(Continued)

Table 8.C3—Hospital Insurance and/or 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 2003—Continued

| Census division and state or area | Skilled nursing facilities | | | Home health agencies | Clinical Laboratory Improvement Act facilities | End stage renal disease facilities |
|-----------------------------------|----------------------------|---------|---------------------------------------|----------------------|--|------------------------------------|
| | Number | Beds | Beds per 1,000 enrollees ^a | | | |
| Pacific | 1,681 | 131,395 | 24.1 | 705 | 24,277 | 514 |
| Alaska | 14 | 508 | 10.7 | 14 | 449 | 2 |
| California | 1,256 | 99,484 | 25.2 | 557 | 18,132 | 398 |
| Hawaii | 41 | 3,553 | 20.4 | 14 | 767 | 18 |
| Oregon | 121 | 9,141 | 18.0 | 59 | 2,017 | 44 |
| Washington | 249 | 18,709 | 24.3 | 61 | 2,912 | 52 |
| Outlying areas | 8 | 335 | 0.4 | 51 | 1,065 | 45 |
| Puerto Rico | 6 | 265 | 0.5 | 46 | 989 | 37 |
| Virgin Islands | 1 | 40 | 3.4 | 2 | 29 | 3 |
| Other | 1 | 30 | 0.1 | 3 | 47 | 5 |

SOURCE: Centers for Medicare & Medicaid Services.

a. Based on total number of beneficiaries enrolled in the Hospital Insurance program as of July 1, 2003.

CONTACT: Maria Diacogiannis (410) 786-0178.

8.E Medicaid: Recipients

Table 8.E1—Unduplicated number of recipients, total vendor payments, and average payment, by type of medical service, selected fiscal years 1985–2002

| Year | Total | Inpatient services in— | | Intermediate-care facility services for— | | Nursing facility ^a | Physicians ¹ | 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 | | | | | | | | | | | |
| Number of recipients (thousands) | | | | | | | | | | | | | | | | |
| 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 | ^a | 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 | ^a | 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 | ^a | 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 | ^a | 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 | ^a | 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 | ^a | 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 | ^a | 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 | ^a | 1,646 | 18,555 | 4,965 | 4,342 | 12,158 | 5,285 | 9,381 | 1,225 | 19,338 | 2,011 | 34,820 |
| 1999 ^b | 40,300 | 4,479 | 96 | 121 | ^a | 1,624 | 18,052 | 5,577 | 3,945 | 12,323 | 6,660 | 10,103 | 808 | 19,428 | ... | 37,484 |
| 2000 ^b | 42,886 | 4,912 | 99 | 118 | ^a | 1,705 | 18,965 | 5,922 | 4,758 | 13,169 | 7,677 | 11,438 | 1,007 | 20,324 | ... | 40,732 |
| 2001 ^b | 46,163 | 4,879 | 91 | 116 | ^a | 1,702 | 20,021 | 7,018 | 5,102 | 13,731 | 8,463 | 12,339 | 1,013 | 21,910 | ... | 44,608 |
| 2002 ^b | 49,754 | 5,051 | 99 | 117 | ^a | 1,765 | 22,102 | 7,885 | 5,570 | 14,861 | 9,498 | 14,067 | 1,065 | 24,424 | ... | 49,925 |
| Total payments (millions of dollars) | | | | | | | | | | | | | | | | |
| 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 | ^a | 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 | ^a | 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 | ^a | 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 | ^a | 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 | ^a | 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 | ^a | 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 | ^a | 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 | ^a | 31,892 | 6,070 | 901 | 587 | 5,759 | 3,921 | 939 | 2,702 | 13,522 | 449 | 38,747 |
| 1999 ^b | 147,372 | 21,341 | 1,638 | 8,756 | ^a | 31,976 | 6,420 | 1,155 | 464 | 5,895 | 5,439 | 1,143 | 2,714 | 15,933 | ... | 44,492 |
| 2000 ^b | 168,442 | 24,130 | 1,769 | 9,375 | ^a | 34,527 | 6,809 | 1,413 | 663 | 7,081 | 6,137 | 1,292 | 3,133 | 19,898 | ... | 52,209 |
| 2001 ^b | 186,913 | 25,943 | 1,959 | 9,700 | ^a | 37,322 | 7,438 | 1,896 | 761 | 7,496 | 5,602 | 1,622 | 3,520 | 23,764 | ... | 59,884 |
| 2002 ^b | 213,491 | 29,127 | 2,122 | 10,681 | ^a | 39,282 | 8,354 | 2,308 | 841 | 8,470 | 6,693 | 2,157 | 3,924 | 28,408 | ... | 71,118 |

(Continued)

Table 8.E1—Unduplicated number of recipients, total vendor payments, and average payment, by type of medical service, selected fiscal years 1985–2002—Continued

| Year | Total | Inpatient services in— | | Intermediate-care facility services for— | | Nursing facility ^a | 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 | | | | | | | | | | | |
| <i>Average payment (dollars)</i> | | | | | | | | | | | | | | | | |
| 1985 | 1,719 | 2,753 | 20,021 | 32,238 | 7,868 | 9,278 | 163 | 98 | 75 | 178 | 337 | 53 | 2,092 | 166 | 119 | 190 |
| 1986 | 1,821 | 2,924 | 20,952 | 35,089 | 8,182 | 9,910 | 171 | 103 | 73 | 185 | 398 | 60 | 2,278 | 183 | 130 | 217 |
| 1987 | 1,949 | 3,000 | 24,714 | 37,490 | 8,571 | 10,432 | 181 | 105 | 74 | 203 | 441 | 63 | 2,777 | 198 | 138 | 227 |
| 1988 | 2,126 | 3,151 | 22,956 | 41,413 | 9,153 | 10,971 | 193 | 114 | 82 | 229 | 490 | 72 | 3,542 | 215 | 135 | 238 |
| 1989 | 2,318 | 3,208 | 16,397 | 44,999 | 9,994 | 11,809 | 217 | 118 | 89 | 250 | 523 | 76 | 4,225 | 232 | 145 | 286 |
| 1990 | 2,568 | 3,630 | 18,548 | 50,048 | 11,236 | 13,356 | 235 | 130 | 96 | 269 | 602 | 80 | 4,733 | 256 | 151 | 315 |
| 1991 | 2,725 | 3,922 | 30,948 | 52,750 | ^a | 13,811 | 256 | 136 | 102 | 303 | 630 | 85 | 5,048 | 277 | 164 | 328 |
| 1992 | 2,936 | 4,075 | 28,364 | 56,502 | ^a | 14,965 | 282 | 149 | 114 | 349 | 685 | 88 | 5,283 | 307 | 196 | 342 |
| 1993 | 3,042 | 4,366 | 28,948 | 59,156 | ^a | 15,798 | 293 | 156 | 179 | 378 | 714 | 88 | 5,250 | 333 | 212 | 385 |
| 1994 | 3,089 | 4,463 | 24,120 | 52,571 | ^a | 16,533 | 296 | 153 | 192 | 383 | 713 | 88 | 5,445 | 363 | 201 | 444 |
| 1995 | 3,311 | 4,735 | 29,847 | 68,613 | ^a | 17,424 | 309 | 160 | 178 | 397 | 804 | 90 | 5,740 | 413 | 206 | 555 |
| 1996 | 3,369 | 4,696 | 21,873 | 68,232 | ^a | 18,589 | 317 | 166 | 205 | 409 | 833 | 96 | 6,293 | 474 | 200 | 566 |
| 1997 | 3,568 | 4,877 | 22,990 | 72,033 | ^a | 19,029 | 333 | 275 | 190 | 453 | 902 | 93 | 6,575 | 571 | 200 | 639 |
| 1998 | 3,501 | 5,031 | 20,701 | 74,960 | ^a | 19,379 | 327 | 182 | 135 | 474 | 742 | 100 | 2,206 | 699 | 223 | 1,113 |
| 1999 ^b | 3,657 | 4,764 | 16,913 | 72,180 | ^a | 19,688 | 356 | 207 | 118 | 478 | 817 | 113 | 3,356 | 820 | ... | 1,187 |
| 2000 ^b | 3,928 | 4,912 | 17,780 | 78,882 | ^a | 20,240 | 359 | 239 | 139 | 538 | 799 | 113 | 3,111 | 979 | ... | 1,282 |
| 2001 ^b | 4,049 | 5,317 | 21,482 | 83,191 | ^a | 21,926 | 372 | 270 | 149 | 546 | 662 | 132 | 3,473 | 1,085 | ... | 1,342 |
| 2002 ^b | 4,291 | 5,766 | 21,352 | 90,907 | ^a | 22,247 | 378 | 293 | 151 | 570 | 705 | 153 | 3,685 | 1,163 | ... | 1,424 |

SOURCE: Data before 1998 are from HCFA-Form 2082, and data onward are from Medicaid Statistical Information System, MSIS, 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" (excludes unknowns).

... = not applicable.

- a. Beginning in fiscal year 1991, "Nursing facility services" category combines "Intermediate care facility services, All other" and "Skilled nursing facility services," which were previously separate. Data under "Nursing facility services" before 1991 reflect "Skilled nursing facility services."
- b. Excludes recipients in Puerto Rico and the Virgin Islands. Data are not available.

CONTACT: Tony Parker (410) 786-0155.

8.E Medicaid: Recipients

Table 8.E2—Unduplicated number of recipients, total vendor payments, and average payment, by type of eligibility category, selected fiscal years 1972–2002

| Year | Total | Aged 65 or older | Blind | Permanent and total disability | Dependent children under age 21 | Adults in families with dependent children | Other |
|---|---------|------------------|-------|--------------------------------|---------------------------------|--|--------|
| <i>Number of recipients (thousands)</i> | | | | | | | |
| 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 |
| 1999 ^a | 40,300 | 4,241 | ... | 7,303 | 20,119 | 8,552 | 846 |
| 2000 ^a | 42,886 | 4,289 | ... | 7,479 | 21,086 | 10,543 | 862 |
| 2001 ^a | 46,163 | 4,420 | ... | 7,703 | 22,533 | 11,639 | 869 |
| 2002 ^a | 49,754 | 4,759 | ... | 8,055 | 24,583 | 13,245 | 903 |
| <i>Total payments (millions of dollars)</i> | | | | | | | |
| 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 |
| 1999 ^a | 147,372 | 40,470 | ... | 63,028 | 20,765 | 15,141 | 7,966 |
| 2000 ^a | 168,442 | 44,560 | ... | 72,772 | 23,490 | 17,671 | 9,948 |
| 2001 ^a | 186,913 | 48,431 | ... | 80,493 | 26,770 | 20,096 | 11,121 |
| 2002 ^a | 213,491 | 51,732 | ... | 91,889 | 31,247 | 23,459 | 15,162 |

(Continued)

Table 8.E2—Unduplicated number of recipients, total vendor payments, and average payment, by type of eligibility category, selected fiscal years 1972–2002—Continued

| Year | Total | Aged 65 or older | Blind | Permanent and total disability | Dependent children under age 21 | Adults in families with dependent children | Other |
|----------------------------------|-------|------------------|-------|--------------------------------|---------------------------------|--|--------|
| <i>Average payment (dollars)</i> | | | | | | | |
| 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 |
| 1999 ^a | 3,657 | 9,541 | ... | 8,630 | 1,032 | 1,770 | 9,407 |
| 2000 ^a | 3,928 | 10,388 | ... | 9,729 | 1,114 | 1,676 | 11,536 |
| 2001 ^a | 4,049 | 10,957 | ... | 10,449 | 1,188 | 1,727 | 12,792 |
| 2002 ^a | 4,291 | 10,870 | ... | 11,408 | 1,271 | 1,771 | 16,777 |

SOURCE: Data before 1998 are from HCFA-Form 2082, and data onward are from Medicaid Statistical Information System, MSIS, 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 1997, "Disability" data includes blindness. "Children" includes foster care children, and "Other" are "Unknowns." In 1999 and 2000, "Other" includes foster care children and "Unknowns." In 2001 and 2002, "Other" includes foster care children, "Unknowns," and BCCA women.

... = not applicable.

a. Excludes recipients in Puerto Rico and the Virgin Islands. Data are not available.

CONTACT: Tony Parker (410) 786-0155.

8.H Medicaid: State Data

Table 8.H1—Number of recipients, total payments, and average payment, by state, fiscal year 2002

| State | Number of recipients | Total payments (millions of dollars) | Average payment (dollars) |
|----------------------------|----------------------|--------------------------------------|---------------------------|
| United States ^a | 49,754,619 | 213,491 | 4,291 |
| Alabama | 765,328 | 3,204 | 4,187 |
| Alaska | 109,641 | 686 | 6,264 |
| Arizona | 878,362 | 2,881 | 3,281 |
| Arkansas | 579,278 | 2,015 | 3,479 |
| California | 9,301,001 | 23,636 | 2,541 |
| Colorado | 425,878 | 2,166 | 5,086 |
| Connecticut | 479,051 | 3,245 | 6,774 |
| Delaware | 167,162 | 651 | 3,897 |
| District of Columbia | 193,494 | 1,027 | 5,308 |
| Florida | 2,676,235 | 9,827 | 3,672 |
| Georgia | 1,637,329 | 4,796 | 2,929 |
| Hawaii | 199,966 | 695 | 3,477 |
| Idaho | 176,499 | 791 | 4,487 |
| Illinois | 1,731,398 | 9,121 | 5,268 |
| Indiana | 849,427 | 3,725 | 4,386 |
| Iowa | 352,635 | 1,855 | 5,263 |
| Kansas | 289,349 | 1,501 | 5,188 |
| Kentucky | 808,294 | 3,459 | 4,280 |
| Louisiana | 898,824 | 3,234 | 3,599 |
| Maine | 275,826 | 1,716 | 6,223 |
| Maryland | 692,539 | 3,662 | 5,288 |
| Massachusetts | 1,065,636 | 6,387 | 5,994 |
| Michigan | 1,449,915 | 5,918 | 4,082 |
| Minnesota | 620,652 | 4,439 | 7,153 |
| Mississippi | 712,457 | 2,499 | 3,508 |
| Missouri | 1,036,150 | 4,071 | 3,929 |
| Montana | 103,617 | 532 | 5,143 |
| Nebraska | 255,771 | 1,255 | 4,907 |
| Nevada | 202,306 | 723 | 3,579 |
| New Hampshire | 104,138 | 745 | 7,161 |
| New Jersey | 954,491 | 5,497 | 5,759 |
| New Mexico | 798,665 | 1,796 | 2,250 |
| New York | 3,920,718 | 31,488 | 8,031 |
| North Carolina | 1,355,269 | 6,041 | 4,457 |
| North Dakota | 70,132 | 422 | 6,028 |
| Ohio | 1,656,124 | 9,186 | 5,547 |
| Oklahoma | 631,498 | 2,238 | 3,544 |
| Oregon | 621,462 | 2,136 | 3,438 |
| Pennsylvania | 1,627,261 | 8,523 | 5,238 |
| Rhode Island | 199,014 | 1,251 | 6,288 |
| South Carolina | 809,136 | 3,382 | 4,181 |
| South Dakota | 117,631 | 503 | 4,284 |
| Tennessee | 1,732,381 | 4,747 | 2,740 |
| Texas | 2,952,569 | 11,121 | 3,767 |
| Utah | 274,707 | 1,215 | 4,425 |
| Vermont | 153,731 | 607 | 3,950 |
| Virginia | 665,203 | 3,017 | 4,537 |
| Washington | 1,039,070 | 4,373 | 4,209 |
| West Virginia | 362,030 | 1,577 | 4,358 |
| Wisconsin | 716,298 | 3,605 | 5,034 |
| Wyoming | 59,071 | 280 | 4,748 |

SOURCE: Centers for Medicare & Medicaid Services.

a. Excludes recipients in Puerto Rico and the Virgin Islands. Data are not available.

CONTACT: Tony Parker (410) 786-0155.

Section 9. Other Social Insurance, Veterans' Benefits, and Public Assistance

Other Social Insurance and Veterans' Benefits

| | |
|--------------------------------|------|
| Unemployment Insurance | 9.1 |
| Workers' Compensation | 9.3 |
| Temporary Disability Insurance | 9.9 |
| Black Lung Benefits | 9.10 |
| Veterans' Benefits | 9.12 |

Public Assistance

| | |
|---|------|
| Temporary Assistance for Needy Families/AFDC and Emergency Assistance | 9.14 |
| Food Stamps | 9.18 |
| Low-Income Home Energy Assistance Program | 9.19 |

Table 9.A2—Summary data on state programs, by state or other area, 2003

| State or area | Covered employment (excludes federal government) | | Insured unemploy- ment as percent of covered employ- ment ^a | Number of first payments | Average weekly benefit for total unemployment | | Average weekly insured unemploy- ment | Average actual duration (weeks) | Claimants exhausting benefits | | Contrib- utions collected ^b (millions of dollars) | Benefits paid ^c (millions of dollars) | Average employer contri- bution rate ^d (percent) |
|----------------------|--|---|--|--------------------------------|---|--|---|--|----------------------------------|---|--|---|--|
| | Average number of workers (thou- sands) | Total payroll ^e (millions of dollars) | | | Amount ^f (dollars) | Percent of average weekly wages ^g | | | Number | Percent of first pay- ments ^h | | | |
| Total | 126,088 | 4,697,431 | 2.8 | 9,935,108 | 261.67 | 36.5 | 3,530,524 | 16.4 | 4,416,574 | 43.4 | 25,328 | 41,359 | 2.2 |
| Alabama | 1,773 | 55,969 | 2.2 | 140,642 | 175.84 | 29.0 | 39,075 | 12.6 | 46,259 | 31.6 | 227 | 301 | 1.7 |
| Alaska | 275 | 10,094 | 5.2 | 49,493 | 193.04 | 27.3 | 14,259 | 14.7 | 21,728 | 44.2 | 106 | 136 | 2.4 |
| Arizona | 2,221 | 77,084 | 2.1 | 115,857 | 173.26 | 26.0 | 47,631 | 17.9 | 60,467 | 48.9 | 134 | 367 | 0.8 |
| Arkansas | 1,095 | 31,223 | 3.2 | 103,426 | 228.90 | 41.7 | 34,875 | 14.0 | 42,205 | 38.2 | 221 | 301 | 2.4 |
| California | 14,558 | 616,870 | 3.7 | 1,379,996 | 246.37 | 30.2 | 531,909 | 18.1 | 693,780 | 49.1 | 3,003 | 6,115 | 3.0 |
| Colorado | 2,064 | 79,589 | 2.0 | 114,887 | 307.68 | 41.5 | 41,315 | 15.2 | 63,221 | 53.6 | 201 | 536 | 1.0 |
| Connecticut | 1,606 | 77,511 | 3.3 | 155,146 | 286.19 | 30.8 | 53,279 | 17.9 | 61,148 | 37.8 | 529 | 736 | 2.8 |
| Delaware | 397 | 16,213 | 2.5 | 32,828 | 234.99 | 29.9 | 9,810 | 16.1 | 10,929 | 31.9 | 54 | 130 | 1.8 |
| District of Columbia | 459 | 25,563 | 1.6 | 21,037 | 258.43 | 24.1 | 7,316 | 20.5 | 19,151 | 85.7 | 90 | 113 | 2.1 |
| Florida | 7,117 | 235,874 | 1.7 | 326,174 | 225.02 | 35.3 | 119,956 | 15.9 | 169,036 | 48.9 | 672 | 1,160 | 1.3 |
| Georgia | 3,693 | 133,539 | 1.9 | 254,544 | 243.43 | 35.0 | 70,024 | 12.6 | 118,428 | 44.2 | 134 | 758 | 0.6 |
| Hawaii | 538 | 17,559 | 1.9 | 29,809 | 312.21 | 49.7 | 10,366 | 15.6 | 8,712 | 28.6 | 149 | 135 | 1.7 |
| Idaho | 562 | 15,888 | 3.4 | 60,000 | 231.77 | 42.7 | 19,376 | 14.0 | 22,360 | 36.8 | 103 | 184 | 1.2 |
| Illinois | 5,604 | 226,144 | 3.3 | 455,182 | 280.94 | 36.2 | 182,846 | 19.0 | 205,121 | 44.7 | 1,315 | 2,455 | 3.0 |
| Indiana | 2,785 | 92,335 | 2.3 | 212,910 | 263.44 | 41.3 | 65,075 | 13.6 | 91,982 | 44.0 | 330 | 769 | 1.9 |
| Iowa | 1,385 | 42,237 | 2.3 | 113,570 | 260.12 | 44.4 | 31,596 | 13.5 | 33,690 | 30.2 | 261 | 377 | 1.5 |
| Kansas | 1,259 | 39,195 | 2.5 | 89,324 | 275.99 | 46.1 | 30,863 | 16.0 | 38,418 | 42.7 | 227 | 372 | 1.8 |
| Kentucky | 1,677 | 52,922 | 2.4 | 135,856 | 249.62 | 41.1 | 39,640 | 14.5 | 39,747 | 28.8 | 288 | 470 | 2.4 |
| Louisiana | 1,819 | 55,284 | 2.0 | 100,279 | 194.93 | 33.4 | 36,615 | 15.7 | 43,730 | 45.3 | 145 | 297 | 1.7 |
| Maine | 577 | 17,451 | 2.3 | 32,592 | 231.13 | 39.8 | 13,072 | 18.2 | 12,906 | 38.9 | 83 | 128 | 1.5 |
| Maryland | 2,306 | 90,487 | 2.1 | 129,951 | 252.14 | 33.4 | 48,325 | 15.9 | 46,933 | 35.3 | 269 | 527 | 1.5 |
| Massachusetts | 3,088 | 142,570 | 3.5 | 280,144 | 356.58 | 40.2 | 107,814 | 18.9 | 137,827 | 45.6 | 825 | 1,794 | 2.5 |
| Michigan | 4,273 | 167,443 | 3.6 | 501,998 | 290.52 | 38.6 | 155,010 | 14.0 | 174,582 | 36.8 | 1,093 | 1,988 | 3.4 |
| Minnesota | 2,542 | 97,737 | 2.4 | 169,854 | 322.15 | 43.6 | 60,655 | 16.7 | 68,030 | 39.5 | 491 | 850 | 1.4 |
| Mississippi | 1,071 | 29,013 | 2.5 | 71,774 | 173.43 | 33.3 | 26,381 | 15.5 | 27,985 | 36.4 | 116 | 192 | 1.7 |
| Missouri | 2,560 | 85,694 | 2.7 | 182,972 | 205.62 | 31.9 | 68,545 | 16.5 | 79,483 | 42.8 | 319 | 627 | 1.9 |
| Montana | 379 | 9,935 | 2.6 | 27,392 | 201.91 | 40.1 | 9,915 | 15.5 | 10,378 | 39.1 | 63 | 81 | 1.1 |
| Nebraska | 859 | 25,832 | 1.7 | 46,204 | 216.16 | 37.4 | 14,359 | 14.1 | 21,252 | 45.8 | 108 | 137 | 1.7 |
| Nevada | 1,064 | 37,324 | 2.6 | 78,438 | 236.29 | 35.0 | 27,774 | 15.8 | 34,104 | 40.8 | 240 | 305 | 1.3 |
| New Hampshire | 596 | 22,103 | 1.6 | 23,035 | 258.60 | 36.3 | 9,504 | 17.8 | 7,937 | 31.7 | 37 | 117 | 1.0 |
| New Jersey | 3,785 | 174,764 | 3.5 | 367,278 | 333.67 | 37.6 | 132,460 | 18.0 | 195,806 | 54.3 | 1,172 | 2,098 | 1.7 |
| New Mexico | 716 | 20,992 | 2.1 | 37,232 | 210.63 | 37.4 | 14,778 | 17.6 | 16,517 | 44.2 | 81 | 136 | 1.0 |
| New York | 8,089 | 381,570 | 3.0 | 599,055 | 271.55 | 29.9 | 240,065 | 18.6 | 364,275 | 58.4 | 2,443 | 3,124 | 4.2 |
| North Carolina | 3,658 | 121,792 | 2.9 | 347,947 | 258.33 | 40.3 | 105,238 | 13.8 | 141,892 | 38.1 | 746 | 955 | 1.7 |
| North Dakota | 304 | 8,279 | 1.5 | 15,578 | 222.30 | 42.5 | 4,466 | 12.4 | 5,575 | 33.9 | 52 | 47 | 1.5 |

(Continued)

9.A Unemployment Insurance

Table 9.A2—Summary data on state programs, by state or other area, 2003—Continued

| State or area | Covered employment (excludes federal government) | | Insured unemploy- ment as percent of covered employ- ment ^a | Number of first payments | Average weekly benefit for total unemployment | | Average weekly insured unemploy- ment | Average actual duration (weeks) | Claimants exhausting benefits | | Contri- butions collected ^b (millions of dollars) | Benefits paid ^c (millions of dollars) | Average employer contri- bution rate ^d (percent) |
|----------------|--|---|--|--------------------------------|---|--|---|--|----------------------------------|---|--|---|--|
| | Average number of workers (thou- sands) | Total payroll ^e (millions of dollars) | | | Amount ^f (dollars) | Percent of average weekly wages ^g | | | Number | Percent of first pay- ments ^h | | | |
| Ohio | 5,202 | 181,327 | 2.5 | 352,874 | 252.04 | 37.6 | 128,930 | 15.6 | 125,309 | 35.6 | 698 | 1,452 | 1.8 |
| Oklahoma | 1,365 | 39,553 | 2.1 | 76,897 | 229.45 | 41.2 | 28,373 | 16.3 | 35,298 | 45.1 | 155 | 287 | 1.2 |
| Oregon | 1,533 | 52,296 | 4.5 | 185,868 | 258.45 | 39.4 | 68,536 | 17.5 | 84,043 | 43.4 | 532 | 856 | 2.3 |
| Pennsylvania | 5,364 | 196,821 | 4.0 | 566,022 | 291.84 | 41.4 | 215,487 | 17.8 | 212,711 | 36.8 | 1,547 | 2,678 | 4.0 |
| Rhode Island | 462 | 16,608 | 3.1 | 43,097 | 308.78 | 44.7 | 14,446 | 15.9 | 18,255 | 41.2 | 135 | 208 | 3.1 |
| South Carolina | 1,740 | 52,996 | 2.8 | 148,646 | 210.05 | 35.9 | 48,588 | 13.7 | 58,756 | 39.5 | 222 | 419 | 2.0 |
| South Dakota | 353 | 9,412 | 1.0 | 11,828 | 201.96 | 39.4 | 3,470 | 12.4 | 2,043 | 17.3 | 15 | 33 | 0.7 |
| Tennessee | 2,549 | 84,555 | 2.3 | 200,848 | 210.24 | 33.0 | 57,966 | 14.5 | 83,824 | 40.2 | 427 | 581 | 2.6 |
| Texas | 9,027 | 331,053 | 2.2 | 533,479 | 260.8 | 37.0 | 198,660 | 16.8 | 288,789 | 52.3 | 2,994 | 2,204 | 2.3 |
| Utah | 1,007 | 30,738 | 1.8 | 57,362 | 269.38 | 45.9 | 18,291 | 14.3 | 25,944 | 42.3 | 90 | 214 | 0.6 |
| Vermont | 288 | 9,143 | 2.9 | 28,265 | 255.08 | 41.8 | 8,384 | 14.4 | 7,193 | 25.9 | 39 | 101 | 2.0 |
| Virginia | 3,265 | 122,511 | 1.5 | 165,621 | 276.09 | 38.3 | 50,197 | 14.0 | 68,815 | 39.0 | 236 | 606 | 1.0 |
| Washington | 2,584 | 99,827 | 4.0 | 267,960 | 324.4 | 43.7 | 102,461 | 18.4 | 101,174 | 36.8 | 1,102 | 1,456 | 2.4 |
| West Virginia | 656 | 18,734 | 2.9 | 54,558 | 219.87 | 40.0 | 19,101 | 15.4 | 15,575 | 27.5 | 123 | 184 | 2.8 |
| Wisconsin | 2,658 | 88,450 | 3.4 | 315,409 | 251.69 | 39.3 | 91,495 | 13.8 | 87,630 | 27.5 | 495 | 973 | 2.2 |
| Wyoming | 234 | 6,893 | 1.7 | 15,612 | 238.07 | 42.1 | 4,074 | 12.8 | 5,192 | 27.4 | 16 | 49 | 0.8 |
| Outlying areas | | | | | | | | | | | | | |
| Puerto Rico | 1,007 | 21,193 | 4.7 | 106,183 | 106.62 | 26.3 | 46,914 | 19.6 | 58,352 | 52.4 | 175 | 228 | 3.4 |
| Virgin Islands | 41 | 1,242 | 2.4 | 2,175 | 277.39 | 47.5 | 962 | 23.5 | 2,077 | 66.6 | 2 | 17 | 0.2 |

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-service members; includes data for state and local government employees where covered by state law after 1955.

- Based on average covered employment in 12-month period.
- Contributions, penalties, and interest from employers and contributions from employees in states taxing workers. Adjusted to exclude refunds of contributions and dishonored checks. Excludes state and local government employees covered on reimbursable basis.
- Adjusted to exclude voided benefit checks and for transfers under interstate combined-wage plan. Excludes Extended Benefits and Emergency Unemployment Compensation.
- Estimated data. 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.
- Total wages earned in covered employment during all pay periods ended within the year.
- Includes dependents' allowances for states that provide such benefits.
- Based on average total weekly wage in current year.
- Percentages based on first payments for 12-month period.

CONTACT: Thomas Stengle (202) 693-2991.

Table 9.B1—Coverage, benefits, and costs, selected years 1940–2002

| 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 ^a | Benefits as a percentage of covered payroll ^b |
|------|--|---|-------------------------------|--------------------------------------|--|-----------------------------|-----------------------|---|--|
| | | Total | Type of insurance | | | Type of benefits | | | |
| | | | Private carriers ^c | State and federal funds ^d | Employers' self-insurance ^d | Medical and hospitalization | Compensation payments | | |
| 1940 | 24.6 | 256 | 135 | 73 | 48 | 95 | 161 | 1.19 | 0.72 |
| 1946 | 32.7 | 434 | 270 | 96 | 68 | 140 | 294 | 0.91 | 0.54 |
| 1948 | 36.0 | 534 | 335 | 121 | 78 | 175 | 359 | 0.96 | 0.51 |
| 1949 | 35.3 | 566 | 353 | 132 | 81 | 185 | 381 | 0.98 | 0.55 |
| 1950 | 36.9 | 615 | 381 | 149 | 85 | 200 | 415 | 0.89 | 0.54 |
| 1951 | 38.7 | 709 | 444 | 170 | 94 | 233 | 476 | 0.90 | 0.54 |
| 1952 | 39.4 | 785 | 491 | 193 | 101 | 260 | 525 | 0.94 | 0.55 |
| 1953 | 40.7 | 841 | 524 | 210 | 107 | 280 | 561 | 0.97 | 0.55 |
| 1954 | 39.8 | 876 | 540 | 225 | 110 | 308 | 568 | 0.98 | 0.57 |
| 1955 | 41.4 | 916 | 563 | 238 | 115 | 325 | 591 | 0.91 | 0.55 |
| 1956 | 43.0 | 1,002 | 618 | 259 | 125 | 350 | 652 | 0.92 | 0.55 |
| 1957 | 43.3 | 1,062 | 661 | 271 | 130 | 360 | 702 | 0.91 | 0.56 |
| 1958 | 42.5 | 1,112 | 694 | 285 | 132 | 375 | 737 | 0.91 | 0.58 |
| 1959 | 44.0 | 1,210 | 753 | 316 | 141 | 410 | 800 | 0.89 | 0.58 |
| 1960 | 44.9 | 1,295 | 810 | 325 | 160 | 435 | 860 | 0.93 | 0.59 |
| 1961 | 45.0 | 1,374 | 851 | 347 | 176 | 460 | 914 | 0.95 | 0.61 |
| 1962 | 46.2 | 1,489 | 924 | 371 | 194 | 495 | 994 | 0.96 | 0.62 |
| 1963 | 47.3 | 1,582 | 988 | 388 | 207 | 525 | 1,057 | 0.99 | 0.62 |
| 1964 | 48.8 | 1,707 | 1,070 | 412 | 226 | 565 | 1,142 | 1.00 | 0.63 |
| 1965 | 50.8 | 1,814 | 1,124 | 445 | 244 | 600 | 1,214 | 1.00 | 0.61 |
| 1966 | 53.7 | 2,000 | 1,239 | 486 | 275 | 680 | 1,320 | 1.02 | 0.61 |
| 1967 | 55.0 | 2,189 | 1,363 | 524 | 303 | 750 | 1,439 | 1.07 | 0.63 |
| 1968 | 56.8 | 2,376 | 1,482 | 556 | 338 | 830 | 1,546 | 1.07 | 0.62 |
| 1969 | 59.0 | 2,634 | 1,641 | 607 | 386 | 920 | 1,714 | 1.08 | 0.62 |
| 1970 | 59.2 | 3,031 | 1,843 | 755 | 432 | 1,050 | 1,981 | 1.11 | 0.66 |
| 1971 | 59.4 | 3,563 | 2,005 | 1,098 | 460 | 1,130 | 2,433 | 1.11 | 0.67 |
| 1972 | 62.3 | 4,061 | 2,179 | 1,379 | 504 | 1,250 | 2,811 | 1.14 | 0.68 |
| 1973 | 66.3 | 5,103 | 2,514 | 1,998 | 592 | 1,480 | 3,623 | 1.17 | 0.70 |
| 1974 | 68.0 | 5,781 | 2,971 | 2,086 | 724 | 1,760 | 4,021 | 1.24 | 0.75 |
| 1975 | 67.2 | 6,598 | 3,422 | 2,324 | 852 | 2,030 | 4,568 | 1.32 | 0.83 |
| 1976 | 69.6 | 7,584 | 3,976 | 2,570 | 1,039 | 2,380 | 5,204 | 1.49 | 0.87 |
| 1977 | 72.1 | 8,630 | 4,629 | 2,750 | 1,250 | 2,680 | 5,950 | 1.71 | 0.92 |
| 1978 | 75.6 | 9,796 | 5,256 | 3,043 | 1,497 | 2,980 | 6,816 | 1.86 | 0.94 |
| 1979 | 78.6 | 12,027 | 6,157 | 4,022 | 1,848 | 3,520 | 8,507 | 1.95 | 1.01 |
| 1980 | 78.8 | 13,618 | 7,029 | 4,330 | 2,259 | 3,947 | 9,671 | 1.96 | 1.07 |
| 1981 | 78.3 | 15,054 | 7,876 | 4,595 | 2,583 | 4,431 | 10,623 | 1.85 | 1.08 |
| 1982 | 77.0 | 16,407 | 8,647 | 4,768 | 2,993 | 5,058 | 11,349 | 1.75 | 1.16 |
| 1983 | 78.0 | 17,575 | 9,265 | 5,061 | 3,249 | 5,681 | 11,894 | 1.67 | 1.17 |
| 1984 | 81.9 | 19,685 | 10,610 | 5,405 | 3,671 | 6,424 | 13,261 | 1.66 | 1.21 |
| 1985 | 84.3 | 22,217 | 12,341 | 5,744 | 4,132 | 7,498 | 14,719 | 1.82 | 1.30 |
| 1986 | 86.0 | 24,613 | 13,827 | 6,248 | 4,538 | 8,642 | 15,971 | 1.99 | 1.37 |
| 1987 | 88.4 | 27,318 | 15,453 | 6,782 | 5,082 | 9,912 | 17,406 | 2.07 | 1.43 |
| 1988 | 91.3 | 30,733 | 17,512 | 7,477 | 5,744 | 11,518 | 19,215 | 2.16 | 1.49 |
| 1989 | 93.7 | 34,316 | 19,918 | 7,965 | 6,433 | 13,424 | 20,892 | 2.04 | 1.46 |
| 1990 | 95.1 | 38,238 | 22,222 | 8,658 | 7,358 | 15,187 | 23,051 | 2.13 | 1.57 |
| 1991 | 93.6 | 42,169 | 24,515 | 9,711 | 7,944 | 16,832 | 25,337 | 2.16 | 1.65 |
| 1992 | 94.6 | 44,660 | 24,030 | 10,987 | 9,643 | 18,252 | 26,408 | 2.13 | 1.69 |
| 1993 | 96.1 | 42,925 | 21,773 | 11,294 | 9,857 | 17,521 | 25,403 | 2.17 | 1.62 |
| 1994 | 109.6 | 44,586 | 22,306 | 10,753 | 11,527 | 17,194 | 27,392 | 2.05 | 1.51 |
| 1995 | 112.4 | 43,373 | 21,145 | 10,996 | 11,232 | 16,733 | 26,640 | 1.82 | 1.38 |
| 1996 | 114.8 | 41,837 | 20,392 | 10,669 | 10,775 | 16,567 | 25,270 | 1.66 | 1.26 |
| 1997 | 118.1 | 42,314 | 21,645 | 10,046 | 10,623 | 17,306 | 25,008 | 1.49 | 1.18 |
| 1998 | 121.5 | 43,278 | 22,966 | 10,109 | 10,203 | 18,121 | 25,157 | 1.38 | 1.11 |
| 1999 | 124.3 | 45,263 | 24,632 | 10,126 | 10,504 | 19,316 | 25,947 | 1.34 | 1.09 |

(Continued)

9.B Workers' Compensation

Table 9.B1—Coverage, benefits, and costs, selected years 1940–2002—Continued

| Year | Estimated number of workers covered per month (millions) | Benefits paid during year (millions of dollars) | | | | | | Cost of program as a percentage of covered payroll ^a | Benefits as a percentage of covered payroll ^b |
|------|--|---|-------------------------------|--------------------------------------|--|-----------------------------|-----------------------|---|--|
| | | Total | Type of insurance | | | Type of benefits | | | |
| | | | Private carriers ^c | State and federal funds ^d | Employers' self-insurance ^d | Medical and hospitalization | Compensation payments | | |
| 2000 | 127.1 | 47,621 | 26,513 | 10,406 | 10,702 | 20,710 | 26,911 | 1.33 | 1.06 |
| 2001 | 127.0 | 49,772 | 27,274 | 11,058 | 11,439 | 22,207 | 27,565 | 1.40 | 1.08 |
| 2002 | 125.6 | 53,443 | 29,028 | 12,539 | 11,876 | 24,285 | 29,158 | 1.58 | 1.16 |

SOURCES: National Academy of Social Insurance estimates based on data received from state agencies, the Department of Labor, A.M. Best Company, and the National Council on Compensation Insurance.

NOTE: Beginning in 1959, includes Alaska and Hawaii. States periodically update prior-year data, and any such changes are included in the current table.

- a. Total costs to employers who purchase insurance from private carriers and state funds consist of premiums written in the calendar year plus the payments made under deductible provisions. For self-insured employers, the costs include benefit payments and administrative costs.
- b. Cash and medical benefits paid by self-insurers.
- c. Net cash and medical benefits paid during calendar year by private insurance companies under standard workers' compensation policies.
- d. Net cash and medical benefits paid by competitive and exclusive state funds and federal benefits including: those paid under the Federal Employees' Compensation Act for civilian employees; the portion of the Black Lung benefit program that is financed by employers; and a portion of benefits under the Longshore and Harbor Workers' Compensation Act that are not reflected in state data, namely, benefits paid by self-insured employers and by special funds under the LHWCA.

CONTACT: Ishita Sengupta (202) 452-8097.

Table 9.B2—Benefits, by state and federal program, 1998–2002 (in thousands of dollars)

| Program | 1998 | 1999 | 2000 | 2001 | 2002 |
|--------------------------|------------|------------|------------|------------|------------|
| Total, state and federal | 43,278,222 | 45,262,686 | 47,620,968 | 49,771,700 | 53,442,645 |
| <i>State programs</i> | | | | | |
| Subtotal | 40,410,346 | 42,400,503 | 44,663,564 | 46,702,433 | 50,289,020 |
| Alabama | 602,088 | 551,398 | 529,189 | 562,773 | 565,264 |
| Alaska | 127,368 | 130,334 | 145,917 | 171,248 | 187,578 |
| Arizona | 432,965 | 465,554 | 515,241 | 465,319 | 528,491 |
| Arkansas | 174,303 | 185,372 | 197,762 | 206,836 | 222,192 |
| California | 7,365,820 | 7,851,641 | 8,967,630 | 9,605,478 | 11,282,610 |
| Colorado | 810,985 | 738,526 | 835,054 | 586,500 | 807,001 |
| Connecticut | 714,822 | 736,857 | 667,056 | 661,471 | 747,959 |
| Delaware | 147,070 | 133,023 | 146,090 | 145,546 | 168,820 |
| District of Columbia | 90,386 | 90,232 | 88,661 | 92,990 | 101,836 |
| Florida | 2,538,353 | 2,768,044 | 2,544,777 | 2,669,630 | 2,305,828 |
| Georgia | 889,131 | 895,690 | 995,775 | 1,067,327 | 1,082,971 |
| Hawaii | 233,225 | 222,056 | 231,359 | 252,041 | 267,827 |
| Idaho | 164,327 | 168,642 | 179,370 | 198,507 | 233,069 |
| Illinois | 1,838,191 | 1,952,697 | 2,049,223 | 2,139,026 | 2,232,015 |
| Indiana | 481,073 | 510,992 | 545,863 | 531,402 | 577,410 |
| Iowa | 320,761 | 322,176 | 356,807 | 395,657 | 427,507 |
| Kansas | 318,976 | 326,196 | 341,547 | 340,343 | 405,091 |
| Kentucky | 421,386 | 477,867 | 479,338 | 482,076 | 527,088 |
| Louisiana | 442,025 | 464,883 | 493,653 | 501,662 | 499,136 |
| Maine | 253,946 | 265,862 | 266,997 | 265,082 | 292,678 |
| Maryland | 691,285 | 714,356 | 729,656 | 796,186 | 783,686 |
| Massachusetts | 728,771 | 733,191 | 828,159 | 774,473 | 807,434 |
| Michigan | 1,366,988 | 1,392,806 | 1,474,058 | 1,477,986 | 1,512,457 |
| Minnesota | 737,100 | 744,500 | 797,800 | 904,200 | 921,000 |
| Mississippi | 234,873 | 253,664 | 269,342 | 271,163 | 286,538 |
| Missouri | 814,287 | 971,628 | 908,819 | 1,079,745 | 1,226,241 |
| Montana | 136,975 | 145,996 | 169,763 | 172,725 | 190,850 |
| Nebraska | 164,382 | 198,276 | 211,285 | 238,300 | 293,089 |
| Nevada | 331,420 | 384,285 | 360,917 | 384,931 | 352,531 |
| New Hampshire | 169,663 | 190,072 | 181,900 | 215,817 | 216,900 |
| New Jersey | 1,164,184 | 1,239,702 | 1,298,824 | 1,362,965 | 1,470,839 |
| New Mexico | 128,290 | 135,903 | 146,374 | 162,810 | 191,189 |
| New York | 2,600,961 | 2,795,769 | 2,909,115 | 2,978,224 | 3,142,392 |
| North Carolina | 810,188 | 813,823 | 853,318 | 890,272 | 1,014,136 |
| North Dakota | 68,925 | 69,911 | 74,402 | 76,158 | 74,456 |
| Ohio | 2,076,545 | 2,038,742 | 2,098,528 | 2,248,375 | 2,388,184 |
| Oklahoma | 536,420 | 496,500 | 484,911 | 499,827 | 489,866 |
| Oregon | 430,521 | 384,110 | 412,471 | 455,625 | 447,548 |
| Pennsylvania | 2,418,072 | 2,467,114 | 2,402,614 | 2,440,407 | 2,531,957 |
| Rhode Island | 110,185 | 113,218 | 113,599 | 124,326 | 131,230 |
| South Carolina | 467,277 | 511,735 | 596,526 | 622,985 | 690,451 |
| South Dakota | 67,088 | 72,509 | 66,991 | 74,950 | 79,256 |
| Tennessee | 550,819 | 586,363 | 642,201 | 691,926 | 679,211 |
| Texas | 1,591,818 | 1,874,974 | 2,004,504 | 2,056,355 | 2,275,338 |
| Utah | 188,543 | 195,774 | 187,729 | 211,279 | 240,179 |
| Vermont | 91,436 | 106,389 | 112,349 | 106,008 | 147,790 |
| Virginia | 658,466 | 629,348 | 680,911 | 671,828 | 700,266 |
| Washington | 1,286,680 | 1,395,246 | 1,527,657 | 1,637,714 | 1,714,497 |
| West Virginia | 644,294 | 687,002 | 690,377 | 712,495 | 829,020 |
| Wisconsin | 703,610 | 724,360 | 768,282 | 923,759 | 893,933 |
| Wyoming | 73,080 | 75,196 | 82,875 | 97,706 | 104,187 |

(Continued)

9.B Workers' Compensation

Table 9.B2—Benefits, by state and federal program, 1998–2002 (in thousands of dollars)—Continued

| Program | 1998 | 1999 | 2000 | 2001 | 2002 |
|-------------------------------------|-----------|-----------|-----------|-----------|-----------|
| <i>Federal programs^a</i> | | | | | |
| Subtotal | 2,867,876 | 2,862,183 | 2,957,404 | 3,069,267 | 3,153,625 |
| Civilian employee | 2,009,862 | 1,999,915 | 2,118,859 | 2,223,088 | 2,317,325 |
| Other | 858,014 | 862,268 | 838,545 | 846,179 | 836,300 |

SOURCES: National Academy of Social Insurance estimates based on data received from state agencies, the Department of Labor, A.M. Best Company, and the National Council on Compensation Insurance.

NOTE: States periodically update prior-year data, and any such changes are included in the current table.

- a. Federal benefits include those paid under the Federal Employees' Compensation Act for civilian employees; the portion of the Black Lung benefit program that is financed by employers; and a portion of benefits under the Longshore and Harbor Workers' Compensation Act that are not reflected in state data, namely, benefits paid by self-insured employers and special funds under the LHWCA.

CONTACT: Ishita Sengupta (202) 452-8097.

**Table 9.B3—Benefits paid by type of insurer and medical benefits paid, by state and federal program, 2002
(in thousands of dollars)**

| Program | Benefits paid by type of insurer | | | | Medical benefits paid | |
|--------------------------|----------------------------------|-------------------------------|-------------|-----------------------------|-----------------------|-----------------------------------|
| | Total | Private carriers ^a | State funds | Self-insurance ^b | Total | As a percentage of total benefits |
| Total, state and federal | 53,442,645 | 29,028,239 | 9,385,022 | 11,875,759 | 24,285,334 | 45.4 |
| State programs | | | | | | |
| Subtotal | 50,289,020 | 29,028,239 | 9,385,022 | 11,875,759 | 23,554,200 | 46.8 |
| Alabama | 565,264 | 290,009 | ... | 275,255 | 327,537 | 57.9 |
| Alaska | 187,578 | 145,324 | ... | 42,254 | 106,578 | 56.8 |
| Arizona | 528,491 | 198,728 | 251,698 | 78,065 | 317,623 | ^c 60.1 |
| Arkansas | 222,192 | 145,163 | ... | 77,029 | 138,648 | ^c 62.4 |
| California | 11,282,610 | 5,947,614 | 2,191,962 | 3,143,034 | 5,645,031 | 50.0 |
| Colorado | 807,001 | 309,436 | 332,725 | 164,840 | 357,063 | 44.2 |
| Connecticut | 747,959 | 543,266 | ... | 204,693 | 310,403 | ^c 41.5 |
| Delaware | 168,820 | 114,348 | ... | 54,472 | 84,217 | ^d 49.9 |
| District of Columbia | 101,836 | 79,781 | ... | 22,055 | 33,471 | 32.9 |
| Florida | 2,305,828 | 1,817,729 | ... | 488,099 | 1,312,016 | ^c 56.9 |
| Georgia | 1,082,971 | 769,767 | ... | 313,205 | 516,577 | ^c 47.7 |
| Hawaii | 267,827 | 175,029 | 11,754 | 81,044 | 105,927 | 39.6 |
| Idaho | 233,069 | 89,549 | 127,837 | 15,683 | 132,150 | ^c 56.7 |
| Illinois | 2,232,015 | 1,748,148 | ... | 483,867 | 991,015 | ^c 44.4 |
| Indiana | 577,410 | 488,138 | ... | 89,272 | 377,212 | ^c 65.3 |
| Iowa | 427,507 | 348,434 | ... | 79,073 | 216,319 | ^c 50.6 |
| Kansas | 405,091 | 298,992 | ... | 106,099 | 219,559 | ^c 54.2 |
| Kentucky | 527,088 | 334,460 | 47,857 | 144,771 | 281,526 | 53.4 |
| Louisiana | 499,136 | 224,795 | 130,484 | 143,857 | 263,045 | ^c 52.7 |
| Maine | 292,678 | 116,675 | 88,952 | 87,051 | 118,734 | 40.6 |
| Maryland | 783,686 | 400,192 | 192,546 | 190,948 | 307,744 | ^c 39.3 |
| Massachusetts | 807,434 | 689,435 | ... | 117,999 | 259,149 | 32.1 |
| Michigan | 1,512,457 | 846,823 | ... | 665,634 | 523,260 | 34.6 |
| Minnesota | 921,000 | 612,600 | 98,100 | 210,300 | 437,500 | 47.5 |
| Mississippi | 286,538 | 168,832 | ... | 117,706 | 163,484 | ^c 57.1 |
| Missouri | 1,226,241 | 870,112 | 82,685 | 273,443 | 592,878 | 48.3 |
| Montana | 190,850 | 72,764 | 83,070 | 35,016 | 102,013 | 53.5 |
| Nebraska | 293,089 | 214,438 | ... | 78,650 | 167,354 | 57.1 |
| Nevada | 352,531 | 230,553 | ... | 121,977 | 129,199 | 36.6 |
| New Hampshire | 216,900 | 180,057 | ... | 36,843 | 120,596 | ^c 55.6 |
| New Jersey | 1,470,839 | 1,356,231 | ... | 114,608 | 759,157 | ^d 51.6 |
| New Mexico | 191,189 | 102,508 | 33,461 | 55,221 | 107,908 | 56.4 |
| New York | 3,142,392 | 1,580,743 | 780,636 | 781,013 | 968,462 | 30.8 |
| North Carolina | 1,014,136 | 774,596 | ... | 239,540 | 435,064 | ^c 42.9 |
| North Dakota | 74,456 | 206 | 74,250 | ... | 41,106 | 55.2 |
| Ohio | 2,388,184 | 37,652 | 1,878,255 | 472,277 | 1,106,570 | 46.3 |
| Oklahoma | 489,866 | 262,579 | 108,982 | 118,305 | 225,828 | ^c 46.1 |
| Oregon | 447,548 | 213,144 | 192,157 | 42,247 | 227,156 | 50.8 |
| Pennsylvania | 2,531,957 | 1,798,988 | 160,795 | 572,174 | 1,005,602 | 39.7 |
| Rhode Island | 131,230 | 50,076 | 65,054 | 16,100 | 30,143 | 23.0 |
| South Carolina | 690,451 | 463,888 | 51,004 | 175,560 | 204,652 | 29.6 |
| South Dakota | 79,256 | 72,726 | ... | 6,530 | 44,020 | 55.5 |
| Tennessee | 679,211 | 526,603 | ... | 152,608 | 348,435 | ^c 51.3 |
| Texas | 2,275,338 | 1,762,267 | 258,460 | 254,612 | 1,412,985 | ^c 62.1 |
| Utah | 240,179 | 85,334 | 121,747 | 33,098 | 159,959 | ^c 66.6 |
| Vermont | 147,790 | 122,330 | ... | 25,459 | 77,885 | ^c 52.7 |
| Virginia | 700,266 | 555,898 | ... | 144,367 | 378,844 | ^c 54.1 |
| Washington | 1,714,497 | 28,768 | 1,225,007 | 460,722 | 589,267 | 34.4 |
| West Virginia | 829,020 | ... | 697,271 | 131,749 | 245,450 | 29.6 |
| Wisconsin | 893,933 | 756,599 | ... | 137,334 | 461,394 | ^d 51.6 |
| Wyoming | 104,187 | 5,913 | 98,274 | ... | 66,487 | 63.8 |

(Continued)

9.B Workers' Compensation

**Table 9.B3—Benefits paid by type of insurer and medical benefits paid, by state and federal program, 2002
(in thousands of dollars)—Continued**

| Program | Benefits paid by type of insurer | | | | Medical benefits paid | |
|--|----------------------------------|-------------------------------|-------------|-----------------------------|-----------------------|-----------------------------------|
| | Total | Private carriers ^a | State funds | Self-insurance ^b | Total | As a percentage of total benefits |
| <i>Federal programs^e</i> | | | | | | |
| Subtotal | 3,153,625 | ... | ... | ... | 731,134 | 23.2 |
| Civilian employee | 2,317,325 | ... | ... | ... | 665,378 | 28.7 |
| Other | 836,300 | ... | ... | ... | 65,756 | 7.9 |

SOURCES: National Academy of Social Insurance estimates based on data received from state agencies, the Department of Labor, A.M. Best Company, and the National Council on Compensation Insurance.

NOTE: ... = not applicable.

- a. States with exclusive funds (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. Medical percentages based on data provided by the National Council on Compensation Insurance.
- d. Medical percentage based on the weighted average of states where medical data were available.
- e. Federal benefits include those paid under the Federal Employees' Compensation Act for civilian employees; the portion of the Black Lung benefit program that is financed by employers; and a portion of benefits under the Longshore and Harbor Workers' Compensation Act that are not reflected in state data, namely, benefits paid by self-insured employers and special funds under the LHWCA.

CONTACT: Ishita Sengupta (202) 452-8097.

Table 9.C1—Selected data on state and railroad programs, 2001

| State and program ^a | Average annual covered employment (thousands) | Taxable payrolls (millions of dollars) | Average weekly number of beneficiaries (thousands) | Average weekly benefit (dollars) | Average duration per period (weeks) | Contributions collected (millions of dollars) | Net benefits paid (millions of dollars) | Administrative expenditures ^b (millions of dollars) |
|-------------------------------------|---|--|--|----------------------------------|-------------------------------------|---|---|--|
| California ^c | 12,706 | 369,930 | -- | -- | -- | -- | 2,700.6 | 190.5 |
| State-operated fund | 12,206 | 349,160 | 91.7 | 288.14 | 13.24 | 3,088.0 | 2,526.1 | 152.8 |
| Private plans | 500 | 20,770 | -- | 449.38 | 12.29 | 212.9 | 174.5 | 37.7 |
| Hawaii ^d (private plans) | 334 | 7,112 | 25.2 | 306.00 | 4.92 | 48.6 | 38.0 | -- |
| New Jersey ^e | ^f 3,500 | -- | -- | -- | -- | -- | 496.1 | 26.9 |
| State-operated fund | ^f 2,803 | ^f 54,900 | -- | 318.00 | -- | 429 | ^g 391.2 | 26.9 |
| Private plans | ^f 697 | -- | -- | -- | -- | -- | 104.9 | 3.0 |
| New York | 6,620 | ^h 43,738 | 49.0 | 190.42 | 7.80 | -- | 564.4 | ^e 9.0 |
| Special state fund ⁱ | ... | ... | 0.5 | 145.07 | 14.61 | -- | 3.5 | -- |
| Private plans ^j | 6,620 | 43,738 | 48.5 | 190.86 | 7.76 | -- | ^k 560.9 | -- |
| Puerto Rico | 634 | 13,223 | -- | -- | -- | -- | 12.6 | 3.3 |
| State-operated fund | 125 | 9,326 | 1.0 | 94.25 | 10.18 | 12.4 | 5.0 | 3.0 |
| Private plans | 509 | 3,897 | 1.3 | 110.00 | 7.21 | 1.0 | 7.6 | 0.3 |
| Rhode Island (state-operated fund) | 411 | 10,250 | 8.9 | 302.02 | 10.20 | 143.0 | 139.0 | 6.0 |
| Railroad (publicly operated fund) | 238 | 3,110 | ^l 6.5 | ^m 239.40 | ^m 14.00 | ⁿ | ^o 54.1 | ⁿ |

SOURCES: State agencies and Railroad Retirement Board.

NOTE: . . . = not applicable; -- = not available.

- a. Statutory programs providing short-term cash benefits to employees unable to work because of nonoccupational illness or injury.
- b. State cost of administering state program and of supervising private plans.
- c. Benefits and beneficiary data are for periods paid or terminated in 2001.
- d. Includes data not shown separately for special fund for workers whose disability begins during unemployment. In 2001, the fund paid \$48,278 in benefits.
- e. State fiscal year data (July 1–June 30).
- f. Estimated data.
- g. Data are for calendar year (January 1–December 31).
- h. First \$7,000 of earnings of each employee, which was paid by the employer during the calendar year.
- i. For workers whose disability begins during unemployment.
- j. Includes State Insurance Fund of \$12.7 million.
- k. Includes medical, surgical, and hospital benefits amounting to \$61.9 million paid under approved plans.
- l. For 14-day registration period.
- m. For benefit year 2000–2001 (July 1, 2000–June 30, 2001).
- n. Single system of contributions and administrative operations for railroad unemployment insurance and temporary disability; collections amounted to \$61.1 million and administrative expenses to \$14 million for the system in 2001.
- o. Of this amount, \$49.1 million was for regular benefits and \$5 million for extended benefits.

CONTACT: Rita L. DiSimone (202) 358-6221.

9.D Black Lung Benefits

Table 9.D1—Benefits currently payable to miners, widows, and dependents, December 1970–2003

| Year | Number | | | | Benefits (thousands of dollars) | |
|------|---------|---------|---------|-------------------------|---------------------------------|---------------|
| | Total | Miners | Widows | Dependents ^a | Monthly amount | Annual amount |
| 1970 | 111,976 | 43,921 | 24,889 | 43,166 | 12,500 | 111,000 |
| 1971 | 231,729 | 77,213 | 67,358 | 87,158 | 27,200 | 378,900 |
| 1972 | 298,963 | 101,802 | 88,067 | 109,094 | 37,800 | 554,400 |
| 1973 | 461,491 | 159,837 | 124,154 | 177,500 | 63,700 | 1,045,200 |
| 1974 | 487,216 | 169,097 | 134,700 | 183,419 | 71,500 | 951,300 |
| 1975 | 482,311 | 165,405 | 139,407 | 177,499 | 75,500 | 947,700 |
| 1976 | 469,655 | 158,087 | 142,495 | 169,073 | 77,400 | 963,300 |
| 1977 | 457,399 | 148,720 | 144,543 | 164,136 | 80,500 | 942,200 |
| 1978 | 439,970 | 138,648 | 145,829 | 155,493 | 82,300 | 965,100 |
| 1979 | 418,948 | 129,558 | 146,527 | 142,863 | 86,500 | 983,100 |
| 1980 | 399,477 | 120,235 | 146,603 | 132,639 | 91,400 | 1,032,000 |
| 1981 | 376,505 | 111,249 | 146,173 | 119,083 | 91,700 | 1,081,300 |
| 1982 | 354,569 | 102,234 | 144,863 | 107,472 | 90,800 | 1,076,000 |
| 1983 | 333,358 | 93,694 | 142,967 | 96,697 | 86,300 | 1,055,800 |
| 1984 | 313,822 | 85,658 | 140,995 | 87,169 | 85,300 | 1,038,000 |
| 1985 | 294,846 | 77,836 | 138,328 | 78,682 | 83,700 | 1,025,000 |
| 1986 | 275,783 | 70,253 | 135,033 | 70,497 | 78,900 | 971,000 |
| 1987 | 258,988 | 63,573 | 131,561 | 63,854 | 76,800 | 940,000 |
| 1988 | 241,626 | 56,977 | 127,322 | 57,327 | 73,500 | 904,000 |
| 1989 | 225,764 | 51,048 | 123,220 | 51,496 | 72,000 | 882,000 |
| 1990 | 210,678 | 45,643 | 118,705 | 46,330 | 70,000 | 863,400 |
| 1991 | 196,419 | 40,703 | 114,046 | 41,670 | 68,400 | 844,400 |
| 1992 | 182,396 | 35,971 | 109,091 | 37,334 | 66,500 | 822,500 |
| 1993 | 168,365 | 31,664 | 103,334 | 33,367 | 64,100 | 794,300 |
| 1994 | 155,172 | 27,828 | 97,414 | 29,930 | 60,600 | 751,900 |
| 1995 | 143,011 | 24,573 | 91,517 | 26,921 | 56,100 | 696,700 |
| 1996 | 131,143 | 21,477 | 85,559 | 24,107 | 52,600 | 654,600 |
| 1997 | 119,233 | 18,488 | 79,238 | 21,507 | 49,255 | 614,888 |
| 1998 | 109,271 | 15,964 | 73,420 | 19,887 | 46,204 | 576,389 |
| 1999 | 98,977 | 13,635 | 67,359 | 17,983 | 43,225 | 541,200 |
| 2000 | 89,355 | 11,587 | 61,542 | 16,226 | 40,625 | 509,290 |
| 2001 | 79,518 | 9,779 | 55,412 | 14,327 | 37,324 | 470,362 |
| 2002 | 71,584 | 8,394 | 50,404 | 12,786 | 35,017 | 439,337 |
| 2003 | 64,237 | 7,142 | 45,746 | 11,349 | 32,198 | 411,635 |

SOURCE: Department of Labor, Beneficiary Master Table, 100 percent data.

a. Includes wives of living miners, divorced wives, children, and dependent brothers and sisters of minors.

CONTACT: Bennett Stewart (606) 432-0116, ext. 126.

Table 9.D2—Benefits currently payable to miners, widows, and dependents, by state or other area, December 2003

| State or area | Number | | | | Monthly amount (thousands of dollars) | | |
|-----------------------------|--------|--------------|--------------|-------------------------|---------------------------------------|---------------------|---------------------|
| | Total | Miners | Widows | Dependents ^a | Total | Miners ^b | Widows ^c |
| All areas | 64,237 | 7,142 | 45,746 | 11,349 | 32,198 | 4,869 | 27,329 |
| Alabama | 2,536 | 168 | 1,912 | 456 | 1,279 | 115 | 1,164 |
| Alaska | 11 | ^d | 10 | ^d | 6 | ^d | ^d |
| Arizona | 197 | 14 | 156 | 27 | 102 | 9 | 93 |
| Arkansas | 373 | 32 | 299 | 42 | 191 | 23 | 168 |
| California | 436 | 35 | 336 | 65 | 223 | 23 | 200 |
| Colorado | 448 | 34 | 352 | 62 | 228 | 24 | 204 |
| Connecticut | 123 | 4 | 108 | 11 | 64 | 3 | 62 |
| Delaware | 90 | 8 | 78 | 4 | 49 | 5 | 44 |
| District of Columbia | 20 | ^d | 18 | ^d | 10 | ^d | ^d |
| Florida | 1,593 | 173 | 1,144 | 276 | 789 | 120 | 669 |
| Georgia | 297 | 18 | 240 | 39 | 153 | 11 | 141 |
| Hawaii | 4 | ^d | ^d | ^d | 2 | ^d | ^d |
| Idaho | 24 | 2 | 17 | 5 | 12 | 2 | 11 |
| Illinois | 2,194 | 154 | 1,774 | 266 | 1,132 | 105 | 1,027 |
| Indiana | 1,197 | 102 | 897 | 198 | 611 | 67 | 544 |
| Iowa | 265 | 23 | 200 | 42 | 135 | 15 | 120 |
| Kansas | 101 | 3 | 92 | 6 | 53 | 2 | 52 |
| Kentucky | 9,341 | 1,474 | 5,723 | 2,144 | 4,524 | 1,013 | 3,512 |
| Louisiana | 31 | ^d | 26 | ^d | 16 | ^d | ^d |
| Maine | 3 | ^d | ^d | ^d | 2 | ^d | ^d |
| Maryland | 616 | 54 | 460 | 102 | 314 | 36 | 278 |
| Massachusetts | 36 | ^d | 29 | 6 | 18 | 1 | 18 |
| Michigan | 728 | 45 | 581 | 102 | 378 | 29 | 349 |
| Minnesota | 22 | ^d | 19 | ^d | 11 | ^d | ^d |
| Mississippi | 44 | 4 | 31 | 9 | 22 | 3 | 19 |
| Missouri | 211 | 11 | 171 | 29 | 109 | 7 | 101 |
| Montana | 67 | 5 | 54 | 8 | 35 | 3 | 32 |
| Nebraska | 7 | ^d | 6 | ^d | 4 | ^d | ^d |
| Nevada | 62 | 4 | 52 | 6 | 32 | 3 | 30 |
| New Hampshire | 4 | ^d | ^d | ^d | 2 | ^d | ^d |
| New Jersey | 491 | 25 | 414 | 52 | 254 | 17 | 236 |
| New Mexico | 139 | 8 | 109 | 22 | 71 | 6 | 65 |
| New York | 433 | 21 | 356 | 56 | 225 | 14 | 211 |
| North Carolina | 642 | 56 | 464 | 122 | 313 | 38 | 275 |
| North Dakota | 4 | ^d | ^d | ^d | 2 | ^d | ^d |
| Ohio | 3,967 | 304 | 3,013 | 650 | 2,032 | 209 | 1,823 |
| Oklahoma | 285 | 29 | 220 | 36 | 146 | 20 | 127 |
| Oregon | 49 | 6 | 35 | 8 | 25 | 4 | 22 |
| Pennsylvania | 15,346 | 1,433 | 11,856 | 2,057 | 7,873 | 957 | 6,916 |
| Rhode Island | 9 | ^d | 8 | ^d | 5 | ^d | ^d |
| South Carolina | 209 | 13 | 159 | 37 | 106 | 10 | 96 |
| South Dakota | 2 | ^d | ^d | ^d | 1 | ^d | ^d |
| Tennessee | 2,665 | 272 | 1,879 | 514 | 1,313 | 187 | 1,126 |
| Texas | 203 | 13 | 156 | 34 | 105 | 8 | 97 |
| Utah | 300 | 35 | 222 | 43 | 150 | 24 | 126 |
| Vermont | 3 | ^d | ^d | ^d | 2 | ^d | ^d |
| Virginia | 5,228 | 753 | 3,405 | 1,070 | 2,570 | 523 | 2,047 |
| Washington | 120 | 10 | 96 | 14 | 60 | 7 | 54 |
| West Virginia | 12,842 | 1,782 | 8,372 | 2,688 | 6,326 | 1,219 | 5,107 |
| Wisconsin | 36 | 2 | 32 | 2 | 19 | 1 | 18 |
| Wyoming | 102 | 5 | 85 | 12 | 53 | 4 | 49 |
| Outlying areas ^e | 81 | 4 | 61 | 16 | 40 | 3 | 37 |

SOURCE: Department of Labor, Beneficiary Master Table, 100 percent data.

- Includes wives of living miners, divorced wives, children, and dependent brothers and sisters of miners.
- Includes benefits for wives and children.
- Includes benefits for surviving children, brothers, sisters, and divorced wives. Prior to December 1997, monthly payments for surviving children were included with payments to miners.
- Not shown to avoid disclosure of information regarding particular individuals.
- Includes beneficiaries residing in American Samoa, Guam, Northern Mariana Islands, Puerto Rico, Virgin Islands, and foreign countries.

CONTACT: Bennett Stewart (606) 432-0116, ext. 126.

9.F Veterans' Benefits

Table 9.F1—Number of disability compensation or pension payments, by type of payment and age of beneficiary, selected years, 1940–2003 (in thousands)

| Year | Total ^a | Service-connected | | | | | | | Not service-connected | | | |
|---------------|--------------------|-------------------|--------------|--------------------------------|----------------|------------------|--------------------------------|----------------|-----------------------|-----|-------|--|
| | | All ages | Under age 65 | | | Aged 65 or older | | | | | | |
| | | | Subtotal | Disability rating ^b | | Subtotal | Disability rating ^b | | | | | |
| | | | | Less than 70 percent | 70–100 percent | | Less than 70 percent | 70–100 percent | | | | |
| As of June 30 | | | | | | | | | | | | |
| 1940 | 610 | 385 | ... | ... | ... | ... | ... | ... | 189 | ... | ... | |
| 1945 | 1,144 | 912 | ... | ... | ... | ... | ... | ... | 159 | ... | ... | |
| 1950 | 2,368 | 1,990 | ... | ... | ... | ... | ... | ... | 290 | ... | ... | |
| 1955 | 2,669 | 2,076 | ... | ... | ... | ... | ... | ... | 531 | ... | ... | |
| 1956 | 2,739 | 2,083 | 2,026 | 1,841 | 185 | 57 | 43 | 14 | 597 | 319 | 278 | |
| As of June 20 | | | | | | | | | | | | |
| 1957 | 2,797 | 2,074 | 2,004 | 1,825 | 179 | 70 | 53 | 17 | 670 | 304 | 366 | |
| 1958 | 2,850 | 2,064 | 1,980 | 1,807 | 173 | 84 | 65 | 19 | 741 | 279 | 462 | |
| 1959 | 2,934 | 2,053 | 1,952 | 1,781 | 171 | 101 | 78 | 23 | 841 | 257 | 584 | |
| 1960 | 3,009 | 2,027 | 1,908 | 1,746 | 162 | 119 | 93 | 26 | 947 | 219 | 728 | |
| 1961 | 3,107 | 2,000 | 1,868 | 1,711 | 158 | 131 | 104 | 27 | 1,077 | 182 | 895 | |
| 1962 | 3,150 | 1,987 | 1,849 | 1,693 | 156 | 138 | 109 | 29 | 1,138 | 166 | 972 | |
| 1963 | 3,181 | 1,989 | 1,844 | 1,686 | 158 | 145 | 115 | 30 | 1,170 | 165 | 1,005 | |
| 1964 | 3,197 | 1,993 | 1,846 | 1,684 | 162 | 147 | 117 | 30 | 1,186 | 176 | 1,010 | |
| 1965 | 3,217 | 1,992 | 1,846 | 1,679 | 167 | 146 | 117 | 29 | 1,210 | 197 | 1,013 | |
| 1966 | 3,201 | 1,993 | 1,850 | 1,677 | 173 | 143 | 115 | 28 | 1,196 | 221 | 975 | |
| 1967 | 3,182 | 1,999 | 1,858 | 1,683 | 175 | 141 | 114 | 27 | 1,173 | 243 | 930 | |
| 1968 | 3,164 | 2,011 | 1,873 | 1,696 | 177 | 138 | 112 | 26 | 1,145 | 265 | 880 | |
| 1969 | 3,160 | 2,039 | 1,904 | 1,712 | 192 | 135 | 110 | 25 | 1,114 | 286 | 828 | |
| 1970 | 3,181 | 2,091 | 1,950 | 1,754 | 196 | 141 | 116 | 25 | 1,086 | 310 | 776 | |
| 1971 | 3,222 | 2,146 | 1,995 | 1,780 | 215 | 151 | 128 | 23 | 1,073 | 335 | 738 | |
| 1972 | 3,269 | 2,183 | 2,022 | 1,804 | 218 | 161 | 135 | 26 | 1,086 | 381 | 705 | |
| 1973 | 3,257 | 2,204 | 2,028 | 1,806 | 222 | 176 | 150 | 26 | 1,053 | 402 | 651 | |
| 1974 | 3,241 | 2,211 | 2,018 | 1,796 | 222 | 193 | 165 | 28 | 1,030 | 410 | 620 | |
| 1975 | 3,227 | 2,220 | 2,006 | 1,784 | 222 | 214 | 185 | 29 | 1,006 | 430 | 576 | |
| 1976 | 3,236 | 2,232 | 1,996 | 1,767 | 229 | 236 | 209 | 27 | 1,003 | 456 | 547 | |

(Continued)

Table 9.F1—Number of disability compensation or pension payments, by type of payment and age of beneficiary, selected years, 1940–2003 (in thousands)—Continued

| Year | Total ^a | Service-connected | | | | | | | Not service-connected | | |
|--------------------|--------------------|-------------------|--------------|--------------------------------|----------------|------------------|--------------------------------|----------------|-----------------------|--------------|------------------|
| | | All ages | Under age 65 | | | Aged 65 or older | | | | | |
| | | | Subtotal | Disability rating ^b | | Subtotal | Disability rating ^b | | | | |
| | | | | Less than 70 percent | 70–100 percent | | Less than 70 percent | 70–100 percent | All ages | Under age 65 | Aged 65 or older |
| As of September 30 | | | | | | | | | | | |
| 1977 | 3,280 | 2,248 | 1,989 | 1,759 | 230 | 258 | 226 | 32 | 1,032 | 505 | 527 |
| 1978 | 3,284 | 2,259 | 1,971 | 1,741 | 230 | 288 | 254 | 34 | 1,025 | 516 | 509 |
| 1979 | 3,241 | 2,267 | 1,944 | 1,717 | 227 | 323 | 285 | 38 | 974 | 500 | 474 |
| 1980 | 3,196 | 2,274 | 1,912 | 1,689 | 223 | 362 | 320 | 42 | 922 | 467 | 455 |
| 1981 | 3,154 | 2,279 | 1,873 | 1,656 | 217 | 406 | 359 | 47 | 875 | 438 | 437 |
| 1982 | 3,096 | 2,274 | 1,818 | 1,606 | 210 | 456 | 404 | 52 | 824 | 406 | 418 |
| 1983 | 3,044 | 2,263 | 1,744 | 1,544 | 200 | 519 | 461 | 58 | 781 | 373 | 408 |
| 1984 | 2,980 | 2,251 | 1,666 | 1,476 | 190 | 585 | 520 | 65 | 729 | 339 | 390 |
| 1985 | 2,931 | 2,240 | 1,589 | 1,408 | 181 | 651 | 579 | 72 | 690 | 306 | 384 |
| 1986 | 2,883 | 2,225 | 1,505 | 1,335 | 169 | 720 | 641 | 79 | 658 | 274 | 384 |
| 1987 | 2,844 | 2,212 | 1,428 | 1,268 | 160 | 784 | 698 | 86 | 631 | 244 | 387 |
| 1988 | 2,804 | 2,199 | 1,361 | 1,209 | 153 | 838 | 746 | 92 | 606 | 219 | 387 |
| 1989 | 2,776 | 2,192 | 1,302 | 1,156 | 146 | 890 | 792 | 98 | 584 | 196 | 388 |
| 1990 | 2,746 | 2,184 | 1,253 | 1,113 | 140 | 931 | 828 | 102 | 562 | 175 | 387 |
| 1991 | 2,709 | 2,179 | 1,238 | 1,098 | 140 | 941 | 838 | 103 | 530 | 156 | 375 |
| 1992 | 2,674 | 2,181 | 1,245 | 1,104 | 141 | 936 | 833 | 103 | 493 | 138 | 354 |
| 1993 | 2,660 | 2,198 | 1,265 | 1,122 | 143 | 932 | 828 | 104 | 462 | 128 | 335 |
| 1994 | 2,659 | 2,218 | 1,290 | 1,144 | 146 | 928 | 824 | 104 | 441 | 122 | 319 |
| 1995 | 2,669 | 2,236 | 1,310 | 1,158 | 152 | 926 | 819 | 107 | 433 | 120 | 313 |
| 1996 | 2,671 | 2,253 | 1,330 | 1,171 | 158 | 923 | 814 | 109 | 418 | 116 | 302 |
| 1997 | 2,667 | 2,263 | 1,346 | 1,178 | 168 | 917 | 805 | 112 | 404 | 112 | 292 |
| 1998 | 2,668 | 2,277 | 1,372 | 1,191 | 180 | 905 | 790 | 115 | 391 | 110 | 281 |
| 1999 | 2,673 | 2,294 | 1,404 | 1,209 | 195 | 890 | 771 | 119 | 379 | 113 | 266 |
| 2000 | 2,672 | 2,308 | 1,435 | 1,224 | 211 | 874 | 751 | 123 | 364 | 115 | 249 |
| 2001 | 2,669 | 2,321 | 1,464 | 1,238 | 226 | 857 | 731 | 126 | 348 | 116 | 232 |
| 2002 | 2,745 | 2,398 | 1,546 | 1,288 | 258 | 852 | 716 | 136 | 347 | 125 | 222 |
| 2003 | 2,832 | 2,485 | 1,634 | 1,335 | 299 | 852 | 703 | 148 | 347 | 136 | 210 |

SOURCE: Department of Veterans Affairs, published and unpublished data.

NOTE: . . . = not applicable.

- a. Persons receiving payments under special acts and as retired emergency and reserve officers are included in the total but not in the distribution. (Totals may not add up because of rounding.)
- 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.

CONTACT: Mike Wells (202) 273-5106.

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 1936–2003

| Year | Temporary Assistance for Needy Families/ Aid to Families with Dependent Children ^a | | | | | | Emergency Assistance ^b | | |
|------|--|------------|----------|------------------------------------|---------------------------|-----------|--|---|--|
| | Average monthly number (thousands) | | | Amount of assistance ^c | | | Average monthly number of families (thousands) | Total assistance payments during year (thousands of dollars) | Average monthly payment per family (dollars) |
| | Families | Recipients | | Total (thousands of dollars) | Monthly average (dollars) | | | | |
| | | 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 | 11,079 | 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 | ^d 278.54 |
| 1983 | 3,686 | 10,761 | 7,098 | 13,837,228 | 312.82 | 107.16 | 30.0 | 125,246 | ^d 283.15 |
| 1984 | 3,714 | 10,831 | 7,144 | 14,503,710 | 325.44 | 111.60 | 32.1 | 141,137 | ^d 276.97 |
| 1985 | 3,701 | 10,855 | 7,198 | 15,195,835 | 342.15 | 116.65 | 32.6 | 157,304 | ^d 312.98 |
| 1986 | 3,763 | 11,038 | 7,334 | 16,033,074 | 355.04 | 121.05 | 34.8 | 178,284 | ^d 362.45 |
| 1987 | 3,776 | 11,027 | 7,366 | 16,372,535 | 361.37 | 123.73 | 42.4 | 213,903 | ^d 358.29 |
| 1988 | 3,749 | 10,915 | 7,329 | 16,826,794 | 374.07 | 128.47 | 48.8 | 278,906 | ^d 420.89 |
| 1989 | 3,799 | 10,993 | 7,420 | 17,465,943 | 383.14 | 132.40 | 48.7 | 296,841 | ^d 461.45 |
| 1990 | 4,057 | 11,695 | 7,917 | 19,066,541 | 391.67 | 135.86 | 56.0 | 348,986 | ^d 476.50 |
| 1991 | 4,467 | 12,930 | 8,715 | 20,930,600 | 390.44 | 134.89 | 59.7 | 302,894 | ^d 422.07 |
| 1992 | 4,829 | 13,773 | 9,303 | 21,655,881 | 373.71 | 131.03 | 52.7 | 272,853 | ^d 431.41 |
| 1993 | 5,012 | 14,205 | 9,574 | 22,688,016 | 377.24 | 133.10 | 56.8 | 387,113 | ^d 568.17 |
| 1994 | 5,035 | 14,154 | 9,570 | 22,827,399 | 377.78 | 134.30 | 60.5 | 802,258 | ^d 1,105.95 |

(Continued)

Table 9.G1—Average monthly number of families and recipients, total amount of cash assistance, and average monthly payment, selected years 1936–2003—Continued

| Year | Temporary Assistance for Needy Families/ Aid to Families with Dependent Children ^a | | | | | | Emergency Assistance ^b | | |
|-------------------|--|------------|----------|------------------------------------|---------------------------|-----------|--|---|--|
| | Average monthly number (thousands) | | | Amount of assistance ^c | | | Average monthly number of families (thousands) | Total assistance payments during year (thousands of dollars) | Average monthly payment per family (dollars) |
| | Families | Recipients | | Total (thousands of dollars) | Monthly average (dollars) | | | | |
| | | Total | Children | | Family | Recipient | | | |
| 1995 | 4,791 | 13,418 | 9,135 | 21,608,686 | 375.31 | 134.21 | 84.1 | 3,447,361 | ^d 3,415.93 |
| 1996 | 4,434 | 12,321 | 8,469 | 20,614,437 | 386.68 | 139.44 | 69.8 | 2,708,401 | ^d 3,235.10 |
| 1997 | 3,740 | 10,376 | 7,042 | 22,031,399 | 490.01 | 176.95 | 81.8 | 403,138 | ^d 410.74 |
| 1998 ^e | 3,050 | 8,347 | 6,034 | 12,925,846 | 353.13 | 129.04 | ... | ... | ... |
| 1999 | 2,554 | 6,824 | 4,863 | 10,925,434 | 356.48 | 133.42 | ... | ... | ... |
| 2000 | 2,213 | 5,768 | 4,260 | 10,472,620 | 394.36 | 151.30 | ... | ... | ... |
| 2001 | 2,102 | 5,352 | 3,981 | 10,007,329 | 396.74 | 155.82 | ... | ... | ... |
| 2002 | 2,045 | 5,058 | 3,790 | 9,716,966 | 395.96 | 160.09 | ... | ... | ... |
| 2003 | 2,021 | 4,919 | 3,708 | 9,534,573 | 393.18 | 161.53 | ... | ... | ... |

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.

- a. Thirty-four states had converted to TANF as of January 1, 1997; 8 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.

CONTACT: Evelyn Mills (202) 401-4055.

9.G TANF/AFDC 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, 2003

| State or area | TANF effective date ^a | Average monthly number | | | Amount of assistance ^b | | |
|----------------------|----------------------------------|------------------------|------------|-----------|-----------------------------------|---------------------------|-----------|
| | | Families | Recipients | | Total (thousands of dollars) | Monthly average (dollars) | |
| | | | Total | Children | | Family | Recipient |
| All areas | . . . | 2,020,819 | 4,918,783 | 3,708,229 | 9,534,573 | 393.18 | 161.53 |
| Alabama | 11/15/96 | 19,158 | 45,541 | 35,771 | 45,689 | 198.73 | 83.60 |
| Alaska | 7/1/97 | 5,211 | 14,749 | 9,815 | 41,978 | 671.31 | 237.19 |
| Arizona | 10/1/96 | 49,434 | 116,478 | 85,197 | 167,501 | 282.36 | 119.84 |
| Arkansas | 7/1/97 | 10,906 | 24,770 | 18,411 | 30,874 | 235.92 | 103.87 |
| California | 11/26/96 | 449,698 | 1,106,544 | 893,339 | 3,475,466 | 644.04 | 261.74 |
| Colorado | 7/1/97 | 13,968 | 36,528 | 26,615 | 57,490 | 343.00 | 131.16 |
| Connecticut | 10/1/96 | 20,634 | 43,441 | 31,060 | 105,195 | 424.85 | 201.80 |
| Delaware | 3/10/97 | 5,626 | 12,732 | 9,677 | 16,725 | 247.72 | 109.47 |
| District of Columbia | 3/1/97 | 16,741 | 42,731 | 31,958 | 66,562 | 331.34 | 129.81 |
| Florida | 10/1/96 | 57,986 | 119,545 | 96,649 | 176,616 | 253.82 | 123.12 |
| Georgia | 1/1/97 | 56,153 | 134,014 | 103,150 | 151,265 | 224.48 | 94.06 |
| Hawaii | 7/1/97 | 9,529 | 24,918 | 17,521 | 60,930 | 532.83 | 203.77 |
| Idaho | 7/1/97 | 1,737 | 3,233 | 2,559 | 6,254 | 299.97 | 161.21 |
| Illinois | 7/1/97 | 36,189 | 92,157 | 75,829 | 58,541 | 134.81 | 52.94 |
| Indiana | 10/1/96 | 52,357 | 138,281 | 104,897 | 127,188 | 202.44 | 76.65 |
| Iowa | 1/1/97 | 19,558 | 50,404 | 33,955 | 76,971 | 327.96 | 127.26 |
| Kansas | 10/1/96 | 15,642 | 40,707 | 28,188 | 57,007 | 303.70 | 116.70 |
| Kentucky | 10/18/96 | 35,065 | 77,222 | 57,192 | 101,423 | 241.04 | 109.45 |
| Louisiana | 1/1/97 | 22,501 | 56,746 | 45,513 | 67,907 | 251.50 | 99.72 |
| Maine | 11/1/96 | 9,926 | 27,503 | 17,643 | 43,201 | 362.69 | 130.90 |
| Maryland | 12/9/96 | 26,055 | 62,123 | 45,839 | 109,940 | 351.62 | 147.48 |
| Massachusetts | 9/30/96 | 49,760 | 109,398 | 76,441 | 313,850 | 525.61 | 239.07 |
| Michigan | 9/30/96 | 76,944 | 205,634 | 151,085 | 366,873 | 397.34 | 148.68 |
| Minnesota | 7/1/97 | 36,196 | 93,569 | 67,066 | 160,082 | 368.56 | 142.57 |
| Mississippi | 10/1/96 | 19,748 | 45,407 | 33,344 | 34,117 | 143.97 | 62.61 |
| Missouri | 12/1/96 | 40,678 | 100,602 | 71,913 | 117,892 | 241.51 | 97.66 |
| Montana | 12/16/96 | 5,988 | 16,698 | 11,031 | 28,740 | 399.97 | 143.43 |
| Nebraska | 12/1/96 | 10,966 | 27,071 | 19,472 | 45,486 | 345.64 | 140.02 |
| Nevada | 12/3/96 | 10,150 | 24,114 | 18,391 | 38,858 | 319.04 | 134.28 |
| New Hampshire | 10/1/96 | 6,072 | 14,090 | 9,680 | 36,756 | 504.49 | 217.40 |
| New Jersey | 2/1/97 | 42,921 | 103,646 | 77,792 | 190,332 | 369.54 | 153.03 |
| New Mexico | 7/1/97 | 16,858 | 44,523 | 31,532 | 61,901 | 305.99 | 115.86 |
| New York | 12/2/96 | 147,805 | 335,924 | 241,106 | 1,021,763 | 576.08 | 253.47 |
| North Carolina | 1/1/97 | 39,843 | 82,614 | 64,262 | 102,966 | 215.36 | 103.86 |
| North Dakota | 7/1/97 | 3,351 | 8,619 | 5,997 | 15,894 | 395.31 | 153.67 |
| Ohio | 10/1/96 | 84,434 | 187,284 | 139,014 | 322,074 | 317.88 | 143.31 |
| Oklahoma | 10/1/96 | 14,956 | 36,504 | 27,920 | 35,601 | 198.37 | 81.27 |
| Oregon | 10/1/96 | 18,659 | 42,599 | 31,521 | 103,967 | 464.33 | 203.38 |
| Pennsylvania | 3/3/97 | 82,182 | 213,990 | 155,885 | 318,901 | 323.37 | 124.19 |
| Rhode Island | 5/1/97 | 13,131 | 34,747 | 24,244 | 66,895 | 424.54 | 160.43 |
| South Carolina | 10/12/96 | 19,639 | 47,376 | 34,724 | 38,239 | 162.26 | 67.26 |
| South Dakota | 12/1/96 | 2,774 | 6,189 | 5,102 | 10,925 | 328.17 | 147.09 |
| Tennessee | 10/1/96 | 70,143 | 185,114 | 132,464 | 143,315 | 170.27 | 64.52 |
| Texas | 11/5/96 | 128,590 | 318,295 | 248,695 | 289,465 | 187.59 | 75.79 |
| Utah | 10/1/96 | 8,745 | 22,309 | 15,977 | 41,687 | 397.27 | 155.72 |

(Continued)

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, 2003—Continued

| State or area | TANF effective date ^a | Average monthly number | | | Amount of assistance ^b | | |
|----------------|----------------------------------|------------------------|------------|----------|-----------------------------------|---------------------------|-----------|
| | | Families | Recipients | | Total (thousands of dollars) | Monthly average (dollars) | |
| | | | Total | Children | | Family | Recipient |
| Vermont | 9/20/96 | 4,865 | 12,510 | 8,009 | 31,211 | 534.65 | 207.91 |
| Virginia | 2/1/97 | 19,748 | 47,154 | 33,138 | 46,414 | 195.86 | 82.02 |
| Washington | 1/10/97 | 54,836 | 135,469 | 94,752 | 279,661 | 425.00 | 172.03 |
| West Virginia | 1/11/97 | 16,052 | 41,129 | 27,929 | 70,517 | 366.08 | 142.88 |
| Wisconsin | 9/30/96 | 20,998 | 50,280 | 40,108 | 112,640 | 447.02 | 186.69 |
| Wyoming | 1/1/97 | 400 | 712 | 618 | 936 | 195.06 | 109.49 |
| Outlying areas | | | | | | | |
| Guam | 7/1/97 | -- | -- | -- | -- | -- | -- |
| Puerto Rico | 7/1/97 | 18,827 | 53,355 | 37,133 | 40,069 | 177.36 | 62.58 |
| Virgin Islands | 7/1/97 | 488 | 1,491 | 1,108 | 1,823 | 311.05 | 101.88 |

SOURCE: Department of Health and Human Services; aggregate data reported by states in Section 3 of the Final TANF Data Report.

NOTE: . . . = not applicable; -- = not available.

- a. Transition from Aid to Families with Dependent Children (AFDC) to Temporary Assistance for Needy Families (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.

CONTACT: Evelyn Mills (202) 401-4055.

9.H Food Stamps

Table 9.H1—Number of participants, total annual benefits, and average benefit, fiscal years 1962–2003

| Year | Average number of participants (thousands) | Total annual benefits (thousands of dollars) | Average monthly benefit ^a (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 ^b | 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 ^c | 26,982 | 22,006,031 | 67.96 |
| 1994 ^c | 27,468 | 22,748,559 | 69.01 |
| 1995 ^c | 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 |
| 2002 | 19,094 | 18,257,136 | 79.68 |
| 2003 | 21,260 | 21,411,981 | 83.93 |

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.

- 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.

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 state and type of assistance, fiscal year 2002

| State | Heating | Cooling | Energy crisis intervention | | Low-cost residential weatherization and energy-related home repair |
|----------------------------|------------------------|----------------------|----------------------------|---------|--|
| | | | Winter | Summer | |
| United States ^a | ^b 4,090,879 | ^c 570,490 | 999,444 | 107,992 | 93,272 |
| Alabama | 41,844 | 26,742 | 12,416 | 9,530 | 569 |
| Alaska | 7,634 | ... | 774 | ... | 553 |
| Arizona | ^b 23,591 | ... | 5,742 | ... | 886 |
| Arkansas | 44,812 | ... | 17,727 | ... | 625 |
| California | ^b 92,777 | ^c ... | 35,371 | ... | 16,213 |
| Colorado | 79,614 | ... | 4,669 | ... | 1,826 |
| Connecticut | 75,934 | ... | 13,426 | ... | ... |
| Delaware | 11,796 | 3,829 | 2,693 | ... | 147 |
| District of Columbia | 18,278 | ... | 1,685 | ... | 242 |
| Florida | 22,153 | 29,260 | 19,514 | 20,998 | 948 |
| Georgia | 76,320 | ... | ... | ... | 801 |
| Hawaii | ^b 484 | ^c ... | ... | 6,114 | ... |
| Idaho | 29,827 | ... | 4,836 | ... | 1,379 |
| Illinois | 150,864 | 45,121 | 11,747 | ... | 1,439 |
| Indiana | 116,698 | 42,632 | 27,057 | ... | 943 |
| Iowa | 75,357 | ... | 4,154 | 2,089 | 1,626 |
| Kansas | 31,834 | ... | 2,055 | ... | 524 |
| Kentucky | 95,581 | 33,139 | 67,838 | ... | 675 |
| Louisiana | 21,056 | 36,793 | 11,479 | ... | 319 |
| Maine | 46,923 | ... | 3,831 | ... | 1,227 |
| Maryland | 66,186 | ... | ^d 1,018 | ... | ... |
| Massachusetts | 131,569 | ... | 9,092 | ... | 6,578 |
| Michigan | 312,841 | ... | 37,681 | ... | 3,407 |
| Minnesota | 111,625 | ... | 25,220 | ... | 709 |
| Mississippi | 23,153 | 25,079 | ... | ... | ... |
| Missouri | 99,522 | ... | 47,009 | ... | ... |
| Montana | 16,974 | ... | 451 | ... | 845 |
| Nebraska | 25,952 | 5,841 | 32,062 | ... | 767 |
| Nevada | 15,665 | 10,001 | 3,196 | ... | ... |
| New Hampshire | 24,876 | ... | ^d 3,878 | ... | 365 |
| New Jersey | 124,783 | 28,741 | 11,014 | ... | 1,264 |
| New Mexico | 34,416 | ... | 6,185 | ... | ... |
| New York | 689,565 | 32,673 | 191,212 | ... | 8,409 |
| North Carolina | 161,953 | ... | 69,306 | ... | 877 |
| North Dakota | 13,530 | 160 | 1,596 | ... | 1,641 |
| Ohio | 248,528 | ... | 123,412 | 58,637 | 7,135 |
| Oklahoma | 46,682 | 19,335 | 32,302 | ... | 317 |
| Oregon | 58,544 | ... | 3,083 | ... | 3,153 |
| Pennsylvania | 296,222 | 152,688 | 73,082 | ... | 7,026 |
| Rhode Island | 24,379 | ... | 2,952 | ... | 833 |
| South Carolina | 28,810 | 8,336 | 9,058 | 10,624 | 543 |
| South Dakota | 14,989 | ... | 614 | ... | 547 |
| Tennessee | 59,566 | 19,258 | 13,778 | ... | 1,777 |
| Texas | 19,769 | 28,045 | 12,496 | ... | 3,143 |
| Utah | 32,031 | ... | 1,830 | ... | 490 |

(Continued)

9.J Low-Income Home Energy Assistance Program

Table 9.J1—Number of households receiving home energy assistance, by state and type of assistance, fiscal year 2002—Continued

| State | Heating | Cooling | Energy crisis intervention | | Low-cost residential weatherization and energy-related home repair |
|---------------|---------|---------|----------------------------|--------|--|
| | | | Winter | Summer | |
| Vermont | 17,935 | ... | 6,165 | ... | 1,212 |
| Virginia | 91,553 | 22,817 | 7,519 | ... | 1,941 |
| Washington | 56,166 | ... | 1,264 | ... | 4,722 |
| West Virginia | 53,592 | ... | 6,196 | ... | 1,142 |
| Wisconsin | 117,326 | ... | 18,382 | ... | 3,298 |
| Wyoming | 8,800 | ... | 1,377 | ... | 189 |

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

NOTE: ... = not applicable.

- 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. Includes households that received combined heating and cooling assistance in Arizona and California and 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 and 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.

CONTACT: Leon Litow (202) 401-5304.

9.J Low-Income Home Energy Assistance Program

Table 9.J1.1—Number of households receiving home energy assistance, by state and type of assistance, fiscal years 1982–2002

| Year | Heating ^a | Cooling ^a | Energy crisis intervention | | Low-cost residential weatherization and 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 |
| 2001 | 4,380,375 | 249,848 | 1,355,560 | 86,795 | 97,447 |
| 2002 | 4,090,879 | 570,490 | 999,444 | 107,992 | 93,272 |

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.

... = not applicable.

a. Several states either provide combined heating and cooling assistance or do not differentiate between heating and cooling assistance. The data for those states are included only in the Heating category.

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 2002 (in dollars)

| State | Regular federal allocation | Supplemental federal allocation | Carry-over to following fiscal year |
|----------------------------|----------------------------|---------------------------------|-------------------------------------|
| United States ^a | 1,653,568,175 | 99,387,492 | 59,061,927 |
| Alabama | 14,284,628 | 0 | 528,292 |
| Alaska | 6,373,367 | 0 | 0 |
| Arizona | 6,378,521 | 1,673,521 | 0 |
| Arkansas | 10,959,034 | 0 | 0 |
| California | 76,505,205 | 0 | 0 |
| Colorado | 26,839,585 | 1,994,729 | 1,269,515 |
| Connecticut | 35,045,798 | 1,604,928 | 3,214,478 |
| Delaware | 4,651,655 | 353,989 | 300,000 |
| District of Columbia | 5,442,670 | 299,513 | 200,000 |
| Florida | 22,716,478 | 0 | 0 |
| Georgia | 17,967,820 | 0 | 0 |
| Hawaii | 1,809,458 | 0 | 18,095 |
| Idaho | 10,307,123 | 878,039 | 261,379 |
| Illinois | 97,000,718 | 8,173,095 | 0 |
| Indiana | 43,909,300 | 3,711,662 | 0 |
| Iowa | 31,126,126 | 1,118,669 | 1,544,169 |
| Kansas | 14,282,663 | 1,008,515 | 0 |
| Kentucky | 22,855,403 | 3,196,722 | 0 |
| Louisiana | 14,683,141 | 0 | 1,274,447 |
| Maine | 21,874,256 | 0 | 251,084 |
| Maryland | 26,834,125 | 1,579,579 | 2,185,487 |
| Massachusetts | 70,075,161 | 4,195,456 | 2,523,073 |
| Michigan | 91,680,099 | 7,694,005 | 8,702,899 |
| Minnesota | 66,348,286 | 2,257,327 | 3,231,468 |
| Mississippi | 12,292,778 | 0 | 218,185 |
| Missouri | 38,745,874 | 2,308,716 | 2,986,560 |
| Montana | 10,430,204 | 498,675 | 514,220 |
| Nebraska | 15,389,463 | 1,400,140 | 640,172 |
| Nevada | 3,262,202 | 1,312,645 | 12,962 |
| New Hampshire | 13,269,106 | 0 | 79,011 |
| New Jersey | 64,917,211 | 4,786,974 | 6,032,000 |
| New Mexico | 8,043,979 | 0 | 0 |
| New York | 212,125,965 | 15,825,802 | 6,197,575 |
| North Carolina | 31,159,322 | 4,019,313 | 3,115,932 |
| North Dakota | 10,921,884 | 385,013 | 1,096,409 |
| Ohio | 85,811,633 | 8,732,990 | 1,854,434 |
| Oklahoma | 11,998,086 | 0 | 331,196 |
| Oregon | 20,712,188 | 1,628,266 | 1,521,830 |
| Pennsylvania | 114,141,586 | 7,244,772 | 7,405,155 |
| Rhode Island | 11,506,691 | 786,593 | 0 |
| South Carolina | 11,406,510 | 1,940,719 | 0 |
| South Dakota | 8,916,026 | 460,584 | 0 |
| Tennessee | 23,152,034 | 0 | 0 |
| Texas | 37,807,287 | 0 | 0 |
| Utah | 12,241,787 | 935,694 | 1,095,898 |
| Vermont | 9,945,667 | 0 | 0 |
| Virginia | 32,686,964 | 3,139,645 | 67,055 |
| Washington | 32,886,631 | 0 | 61,588 |
| West Virginia | 15,125,156 | 1,210,876 | 0 |
| Wisconsin | 59,722,984 | 2,702,967 | 0 |
| Wyoming | 4,998,337 | 327,359 | 327,359 |

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

a. Net of set-asides to direct-grant Indian tribes and tribal organizations and the insular areas.

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 1982–2002 (in dollars)

| Year | Regular federal allocation | Supplemental federal allocation | Carry-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 | 1,059,828,175 | 731,648,623 | 58,888,497 |
| 2001 | 1,357,793,477 | 451,391,311 | 70,117,647 |
| 2002 ^a | 1,653,568,175 | 99,387,492 | 59,061,927 |

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

a. Net of set-asides to direct-grant Indian tribes and tribal organizations and the insular areas.

CONTACT: Leon Litow (202) 401-5304.

9.J Low-Income Home Energy Assistance Program

Table 9.J3—Estimated home energy assistance obligations, by state and type of assistance, fiscal year 2002 (in dollars)

| State | Heating | Cooling | Energy crisis intervention | Weatherization |
|----------------------|----------------------------|-------------------------|----------------------------|------------------------|
| United States | ^a 1,039,287,196 | ^b 77,732,865 | 268,262,280 | 213,987,850 |
| Alabama | 5,837,939 | 3,920,412 | 3,533,558 | 714,234 |
| Alaska | 5,274,251 | ... | 553,386 | ^c 3,248,191 |
| Arizona | ^a 4,576,086 | ^b ... | 1,779,588 | 1,544,735 |
| Arkansas | 5,000,051 | ... | 3,164,829 | 1,643,855 |
| California | ^a 28,179,906 | ^b ... | 20,852,120 | 18,438,198 |
| Colorado | 24,216,816 | ... | 1,265,502 | 3,341,972 |
| Connecticut | 30,344,655 | ... | 2,180,851 | ... |
| Delaware | 2,848,792 | 649,000 | 455,309 | 506,358 |
| District of Columbia | 5,646,022 | ... | 600,000 | 1,305,239 |
| Florida | 3,234,271 | 4,466,375 | 10,273,176 | 3,305,248 |
| Georgia | 15,141,921 | ... | ... | 1,990,482 |
| Hawaii | ^a 1,583,035 | ^b ... | 45,081 | ... |
| Idaho | 6,681,645 | ... | 1,503,331 | 1,307,974 |
| Illinois | 69,243,091 | 7,379,011 | 9,546,192 | 13,564,493 |
| Indiana | 30,188,864 | 2,298,595 | 4,212,416 | 3,631,795 |
| Iowa | 21,721,603 | ... | 1,189,749 | 4,668,919 |
| Kansas | 10,322,092 | ... | 690,480 | 1,928,159 |
| Kentucky | 10,373,165 | 2,877,050 | 8,176,601 | 2,495,245 |
| Louisiana | 647,270 | 16,307,394 | 100,000 | 1,807,338 |
| Maine | 15,819,535 | ... | 618,694 | 3,625,885 |
| Maryland | 24,266,091 | ... | ... | ... |
| Massachusetts | 55,152,567 | ... | ^d ... | 4,846,813 |
| Michigan | 63,103,246 | ... | 12,256,445 | 7,705,586 |
| Minnesota | 46,933,588 | ... | 11,506,289 | 3,018,590 |
| Mississippi | 5,041,089 | 5,461,180 | ... | ... |
| Missouri | 18,462,806 | ... | 14,700,888 | ... |
| Montana | 6,871,014 | ... | 333,464 | 2,264,102 |
| Nebraska | 4,998,859 | 544,588 | 6,848,990 | 1,693,237 |
| Nevada | 1,164,156 | 1,564,343 | ^d ... | ... |
| New Hampshire | 11,344,620 | ... | ... | 300,000 |
| New Jersey | 51,677,211 | 2,876,000 | 4,114,000 | 3,222,000 |
| New Mexico | 6,483,060 | ... | 1,256,520 | ^d ... |
| New York | 120,202,468 | 801,781 | 45,736,096 | 33,991,233 |
| North Carolina | 11,934,632 | ... | 16,347,048 | 3,684,116 |
| North Dakota | 5,638,846 | ^e 237,625 | 1,420,363 | 2,550,000 |
| Ohio | 47,633,933 | ... | 29,054,569 | 13,119,478 |
| Oklahoma | 5,697,661 | 3,006,725 | 1,024,140 | 883,029 |
| Oregon | 14,373,651 | ... | 840,747 | 3,876,634 |
| Pennsylvania | 71,953,759 | 2,747,028 | 18,270,534 | 17,120,000 |
| Rhode Island | 8,898,162 | ... | 304,711 | 1,870,002 |
| South Carolina | 3,421,953 | 2,281,302 | 5,939,496 | 1,140,651 |
| South Dakota | 6,939,168 | ... | 363,773 | 1,377,404 |
| Tennessee | 12,764,756 | 1,891,075 | 4,254,919 | 2,083,683 |
| Texas | 8,689,568 | 13,883,527 | 3,988,448 | 15,528,055 |
| Utah | 9,147,794 | ... | 636,343 | 1,224,179 |

(Continued)

9.J Low-Income Home Energy Assistance Program

Table 9.J3—Estimated home energy assistance obligations, by state and type of assistance, fiscal year 2002 (in dollars)—Continued

| State | Heating | Cooling | Energy crisis intervention | Weatherization |
|---------------|------------|-----------|----------------------------|----------------|
| Vermont | 7,744,588 | ... | 1,309,302 | 239,933 |
| Virginia | 19,605,684 | 4,539,854 | 2,802,074 | 5,489,176 |
| Washington | 23,324,311 | ... | 724,045 | 4,950,457 |
| West Virginia | 11,212,251 | ... | 1,512,516 | 2,268,773 |
| Wisconsin | 54,836,329 | ... | 11,616,160 | 9,361,067 |
| Wyoming | 2,888,365 | ... | 359,537 | 1,111,332 |

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

NOTES: Includes federal LIHEAP appropriated funds and nonfederal funds operated through the LIHEAP program.

... = not applicable.

- a. Includes funds for households that received combined heating and cooling assistance in Arizona and California and 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 and households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.
- c. Includes \$1.9 million in state funds for weatherization assistance.
- d. State provided weatherization assistance with funds obligated in fiscal year 2000.
- e. State provided cooling assistance with funds obligated in fiscal year 2000.

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 1982–2002 (in dollars)

| Year | Heating ^a | Cooling ^a | Energy intervention crisis | Weatherization |
|------|----------------------|----------------------|----------------------------|----------------|
| 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 |
| 2001 | 1,302,453,006 | 54,735,350 | 474,281,110 | 234,197,220 |
| 2002 | 1,039,287,196 | 77,732,865 | 268,262,280 | 213,987,850 |

SOURCE: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

NOTE: Includes federal LIHEAP appropriated funds and nonfederal funds operated through the LIHEAP program.

a. Several states either provide combined heating and cooling assistance or do not differentiate between heating and cooling assistance. The data for those states are included only in the Heating category.

CONTACT: Leon Litow (202) 401-5304.

Appendixes

| | |
|--|------------|
| A. Sampling Variability | A.1 |
| B. OASDI Benefit Award Data | B.1 |
| C. Poverty Data | C.1 |
| D. Computing a Retired-Worker Benefit | D.1 |

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 Table A-2 provide approximations of the standard errors of the estimated percentage of persons in the 1 percent and 10 percent files. The standard errors are expressed in percentage points and the bases shown are in terms of inflated data.

CONTACT: Cherice N. Jefferies (410) 965-5520.

Table A-1.
Approximations of standard errors of estimated number of persons

| Size of estimate (inflated) | Standard error |
|-----------------------------|----------------|
| <i>1 percent file</i> | |
| 500 | 250 |
| 1,000 | 300 |
| 2,500 | 500 |
| 5,000 | 800 |
| 7,500 | 900 |
| 10,000 | 1,100 |
| 25,000 | 1,700 |
| 50,000 | 2,400 |
| 75,000 | 3,000 |
| 100,000 | 3,400 |
| 250,000 | 5,400 |
| 500,000 | 7,800 |
| 750,000 | 9,600 |
| 1,000,000 | 11,100 |
| 5,000,000 | 25,800 |
| 10,000,000 | 36,900 |
| 25,000,000 | 57,700 |
| 50,000,000 | 76,100 |
| 75,000,000 | 82,900 |
| <i>10 percent file</i> | |
| 100 | 30 |
| 500 | 70 |
| 1,000 | 100 |
| 5,000 | 225 |
| 10,000 | 300 |
| 50,000 | 700 |
| 100,000 | 1,000 |
| 500,000 | 2,200 |
| 1,000,000 | 3,200 |
| 2,000,000 | 4,300 |
| 3,000,000 | 5,300 |
| 5,000,000 | 6,500 |
| 10,000,000 | 8,500 |
| 20,000,000 | 9,300 |

Table A-2.
Approximations of standard errors of estimated
percentage of persons

| Size of base (inflated) | 2 or 98 | 5 or 95 | 10 or 90 | 25 or 75 | 50 |
|----------------------------|---------|---------|----------|----------|------|
| <i>1 percent file</i> | | | | | |
| 1,000 | 4.7 | 7.3 | 10.1 | 14.5 | 16.8 |
| 10,000 | 1.5 | 2.3 | 3.2 | 4.6 | 5.3 |
| 50,000 | 0.7 | 1.0 | 1.4 | 2.1 | 2.4 |
| 100,000 | 0.5 | 0.7 | 1.0 | 1.5 | 1.7 |
| 500,000 | 0.2 | 0.3 | 0.4 | 0.7 | 0.8 |
| 1,000,000 | 0.1 | 0.2 | 0.3 | 0.5 | 0.5 |
| 5,000,000 | 0.1 | 0.1 | 0.1 | 0.2 | 0.2 |
| 10,000,000 | a | 0.1 | 0.1 | 0.2 | 0.2 |
| 50,000,000 | a | a | a | 0.1 | 0.1 |
| 100,000,000 | a | a | a | a | a |
| <i>10 percent file</i> | | | | | |
| 500 | 1.9 | 3.0 | 4.1 | 5.9 | 6.8 |
| 1,000 | 1.3 | 2.1 | 2.9 | 4.1 | 4.8 |
| 2,500 | 0.8 | 1.3 | 1.8 | 2.6 | 3.0 |
| 10,000 | 0.4 | 0.6 | 0.9 | 1.3 | 1.5 |
| 50,000 | 0.2 | 0.3 | 0.4 | 0.6 | 0.7 |
| 100,000 | 0.1 | 0.2 | 0.3 | 0.4 | 0.5 |
| 500,000 | a | 0.1 | 0.1 | 0.2 | 0.2 |
| 1,000,000 | a | 0.1 | 0.1 | 0.1 | 0.2 |
| 5,000,000 | a | a | a | a | 0.1 |
| 10,000,000 | a | a | a | a | a |
| 50,000,000 | a | a | a | a | a |

a. Less than 0.05 percent.

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 1959–2003. Table 3.E2 presents data on the number and percentage of people in poverty in the United States for 1959–2002. Tables 3.E3, 3.E4, and 3.E6 present more detailed data on people and families in poverty in the United States during 2002. (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 1965–2004. (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 that 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 inter-agency committees. The thresholds were based on food expenditure/money income ratios (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 Carmen DeNavas-Walt, Bernadette D. Proctor, and Robert J. Mills, U.S. Census Bureau, "Income, Poverty, and Health Insurance Coverage in the United States: 2003," *Current Population Reports: Consumer Income*, Series P60-226, August 2004, Appendix B, and Joseph Dalaker and Bernadette D. Proctor, U.S. Census Bureau, "Poverty in the United States: 1999," *Current Population Reports: Consumer Income*, Series P60-210, September 2000, Appendix A, for explanations of the poverty definition.) Although the poverty thresholds in some sense represent families' needs, the official poverty measure should be interpreted as a statistical yardstick rather than as a complete description of what people and families need to live.

The poverty thresholds have become the basis for the official statistics on the extent of poverty in the United States, which are issued annually by the Census Bureau in the *Current Population Reports* series. The thresholds are adjusted annually for price changes using the annual average consumer price index (CPI-U). (See U.S.

Bureau of the Census, "Revision in Poverty Statistics, 1959 to 1968," *Current Population Reports: Special Studies*, 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 thresholds are the same for all 50 states and the District of Columbia.

The poverty guidelines are a simplified version of the poverty thresholds. There are separate sets of guidelines for the two noncontiguous states (Hawaii and Alaska). The guidelines are used for determining whether a person or family is financially eligible for assistance or services under certain federal programs. Authorizing legislation or regulations for specific programs indicate whether a program uses the poverty guidelines as one of several eligibility criteria, uses a modification of the guidelines (for example, 125 percent or 185 percent of the guidelines), or uses them for the purpose of setting priorities in providing assistance or services.

Since 1973, the guidelines have been computed from the poverty thresholds by increasing the most recently published weighted average poverty thresholds by the percentage change in the CPI-U over the past year (more precisely, from the next most recent calendar year to the most recent calendar year) and rounding the figure for a family of four up to the next highest multiple of \$50. Figures for all family sizes over and under four persons are computed by adding or subtracting equal dollar amounts derived from the average difference between poverty lines (rounded to the nearest multiple of \$20).

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.

Orshansky calculated the poverty thresholds using data (from the 1955 Household Food Consumption Survey) that defined income as after-tax money income. However, when the thresholds were used to calculate poverty population figures, they were applied to family income microdata (from the Census Bureau's Current

Population Survey) that defined income as before-tax money income, because no other good source of family income microdata was available in the 1960s that used after-tax income as a definition of income.

In 1969, a federal interagency committee made two changes in the poverty definition: the thresholds would be annually updated by the consumer price index instead of by the per capita cost of the economy food plan, and farm poverty thresholds would be set at 85 percent rather than 70 percent of corresponding nonfarm thresholds. (Poverty threshold and poverty population figures for prior years were retabulated retrospectively on this basis.) In August 1969, the Bureau of the Budget designated the poverty thresholds with these revisions as the federal government's official statistical definition of poverty.

In 1981, several other changes recommended by another interagency committee were made in the poverty definition: (1) elimination of separate thresholds for farm families, (2) elimination (through appropriate averaging) of separate thresholds for female-householder and "all other" families, and (3) extension of the poverty matrix to make the largest family size category "nine persons or more" rather than "seven or more persons." (See U.S. Bureau of the Census, "Characteristics of the Population Below the Poverty Level: 1980," *Current Population Reports: 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, DC, National Academy Press, 1995. In the report, the panel proposed a new approach for developing an official poverty measure for the United States—although it did not propose a 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 site at <http://www.census.gov/hhes/www/povmeas.html>.

Data on the poverty population and on family and personal income are collected in the Current Population Survey Annual Social and Economic Supplement (CPS ASEC), formerly known as the March Supplement. Following the standard Census Bureau definition, the family is defined as two or more persons related by birth, marriage, or adoption and residing together. "Income" refers to money income before federal, state, or local personal income taxes and excludes capital gains and lump-sum payments; however, public income transfers are included. Money income does not reflect that many families receive noncash benefits such as employee use of business transportation and facilities, employer-paid health insurance and other employer-supported fringe benefits, Medicare, Medicaid, food stamps, and housing assistance. Many farm families receive benefits in the form of rent-free housing or goods produced and consumed by the family.

Every year between February and April, the sample of U.S. households interviewed in the monthly CPS is asked to provide information on household members' incomes during the preceding calendar year. Survey experience indicates that respondents tend to underreport their income in household surveys. Underreporting is most pronounced for dividends, interest, and workers' compensation; less pronounced for veterans' payments, public assistance, and private pensions; and modest for Social Security and other federal retirement programs. The proportion of nonresponses to CPS income questions is greater among middle income and higher income families than among lower income families.

Because the CPS sample size, content, and procedures 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 Edward Welniak, "Effects of the March Current Population Survey's New Processing System on Estimates of Income and Poverty," Proceedings of the American Statistical Association, 1990.

Further details about CPS methodology may be found in Technical Paper 63RV, available at <http://www.bls.census.gov/cps/tp/tp63.htm>.

If you need to find additional poverty data, you may browse the U.S. Census Bureau poverty Web site at <http://www.census.gov/hhes/www/poverty.html>, contact the Census Bureau's Housing and Household Economic Statistics Division Information Staff at (301) 763-3242, or visit the Census Bureau's Question & Answer Center at <http://ask.census.gov>.

For further information about technical changes to the poverty measure, contact Joe Dalaker at (301) 763-3213 or e-mail joseph.dalaker@census.gov.

For further information about the statistical reliability of the CPS estimates, contact 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 and Table D-3; P60-194, pp. v and xiii and Table D-3. |
| 1995 | Revised edit and allocation procedures for race groups. | P60-194, pp. v and xiii. |
| 2000 | Expansion of CPS sample interviewed from about 50,000 households to about 78,000 households nationwide. Poverty data for 2000 and 2001 from sample expansion first published in P60-219, "Poverty in the United States: 2001." In the same report, data were weighted using Census 2000 results. | P60-219, Appendix B. |
| 2002 | For the first time, the 2003 CPS ASEC recorded multiple categories for respondents who identified themselves with more than one race. We do not know how people who reported more than one race in 2002 previously reported their race. Therefore, there is no single way to compare changes to poverty by race between 2001 and 2002. The "Asian or Pacific Islander" race category was divided into two groups: "Asians" and "Native Hawaiians and Other Pacific Islanders." | P60-222, pp. 2–3, 5. |

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Appendix D: Computing a Retired-Worker Benefit

Overview

This section provides instructions and a worksheet for computing a retired-worker benefit. The worksheet can be used for persons born in 1929 through 1942—that is, those who attained age 62 in 2004 or earlier and were under age 75 at the end of 2004. 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 2004, actual earnings in 1984 of \$20,000 are indexed to \$41,217.16, based on 2002 wage levels. Earnings after age 60 are included at their actual (nominal) value.
- *To replace a portion of the indexed earnings.* Indexed earnings are averaged over the number of computation years to calculate the average indexed monthly earnings (AIME). A benefit formula is applied to the AIME to produce the primary insurance amount (PIA), the amount payable to a worker who retires at the full retirement age (FRA). The benefit formula is weighted to provide a higher replacement of earnings for lower wage workers. The formula for persons age 62 in 2004 is 90 percent of the first \$612 of AIME; plus 32 percent of the next \$3,077; plus 15 percent of the AIME over \$3,689.
- *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 10 months in the year 2004 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 2004, the maximum reduction is 24 1/6 percent if the individual is entitled to benefits for all 46 months between 62 and 65 and 10 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 2003 benefit increase was 2.1 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 the FRA and age 69 may receive increased benefits as a result of the delayed retirement credit (DRC) provision. The benefit is increased by a specified percentage for each month a benefit was not received (See Table 2.A20 for percentage increases).

Clarifying the Worksheet Procedure

Step 1 - Determining the Number of Computation Years

For persons who attain age 62 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 2004. The indexing year is 2002. The average annual wage for 2002 was \$33,252.09. The average annual wage for 1990 was \$21,027.98. The amount, \$33,252.09 divided by \$21,027.98, yields a factor of 1.5813259.

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 1.5813259, result in indexed earnings of \$15,813.26; actual earnings of \$51,300 (the maximum creditable) result in indexed earnings of \$81,122.02.

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 2004, 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 2004, the bend points are \$612 and \$3,689. Thus the formula is 90 percent of the first \$612 of AIME; plus 32 percent of the next \$3,077 of AIME; plus 15 percent of AIME above \$3,689. 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 \$659.60

Based on: 90 percent of \$612 (\$550.80); plus
32 percent of \$340 (\$108.80)

Example 3 - AIME of \$4,000

PIA is \$1,582.09 rounded to \$1,582

Based on: 90 percent of \$612 (\$550.80); plus
32 percent of \$3,077 (\$984.64); plus
15 percent of \$311 (\$46.65)

The above calculations are applicable to workers who attain age 62 in 2004. 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 2004. Worksheet 2 shows cost-of-living increase factors for 1979 through 2003. After the PIA is calculated for the year of attainment of age 62, cost-of-living increases are applied for each year through 2003. The result is the current 2004 PIA.

For example, a worker who attained age 62 in 2001 would receive cost-of-living adjustments for the years 2001–2003. 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:

2001: \$500 multiplied by 1.026 = \$513

2002: \$513 multiplied by 1.014 = \$520.18

2003: \$520.10 multiplied by 1.021 = \$531

\$531 would be the PIA effective December 2003.

Step 5 - Computation of the Monthly Benefit

The full PIA is payable to a worker who retires at the full retirement age (FRA). Beginning in the year 2000, the FRA, scheduled to be gradually raised to age 67 for workers attaining age 62 in 2022, began to be phased in. Workers can still retire as early as age 62, but the monthly benefit is reduced by 5/9 of 1 percent for each of the first 36 months of entitlement immediately preceding the full retirement age plus 5/12 of 1 percent for each of up to 24 earlier months. Workers attaining age 62 in 2004 have their benefits computed based on the full retirement age of 65 and 10 months. See Table 2.A17.1 to determine the FRA based on the year of birth as well as the reduction factors. For individuals electing benefits at exactly age 62 in the year 2004, the maximum reduction is 24 1/6 percent.

For example, in 2004 a worker with a PIA of \$500 would receive \$379 at age 62. The PIA is reduced by \$120.83, 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 10 months for a total reduction of 24 1/6 percent. After reduction of the PIA by \$120.83, 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 1991–2004)

| STEP 1.—Determining the Number of Computation Years | | |
|---|--|------|
| 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). | |
| STEP 2.—Indexing of Earnings (Use Worksheet 1 for Steps 2 and 3.) | | |
| 8 | Enter in column 2 your earnings in each year 1951 through 2003. 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 1991–2004.) | |
| 12 | Multiply column 4 by column 5 and enter results in column 6 in dollars and cents. These are your indexed earnings. | |
| STEP 3.—Computing the Average Indexed Monthly Earnings (AIME) | | |
| 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). | |
| STEP 4.—Computing the Primary Insurance Amount (PIA) (Use Worksheet 2 for Step 4.) | | |
| 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. | |

(Continued)

Instructions for computing a retired-worker benefit (only for workers attaining age 62 in years 1991–2004)—Continued

| | | |
|--|---|-----------|
| 38 | If you attained age 62 in 2004, 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 2003 by using lines 39–43 and Worksheet 2. | |
| 39 | Enter year of attainment of age 62 from line 3. | |
| 40 | Place an "X" corresponding to the year you attained age 62 in column 5, Worksheet 2. | |
| 41 | Place an "X" in column 5 (Worksheet 2) next to each subsequent year through 2003. | |
| 42 | Enter your age 62 PIA from either line 24, 30, or 37—here and in the first row of column 6, Worksheet 2. | |
| 43 | Beginning with first year marked, multiply your 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 2003. Enter this last figure, which is your current PIA. | |
| STEP 5.—Computing the Monthly Benefit | | |
| 44 | Enter your current PIA from either line 24, 30, 37, or 43. | |
| 45 | Using Table 2.A17.1, determine your full retirement age and enter here. | |
| 46 | If you retired at your full retirement age round PIA from line 44 to 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

| Year | Your earnings | Maximum taxable earnings (dollars) | Lower of columns 2 or 3 | Indexing factor | Column 4 times column 5 | Highest indexed earnings |
|------|---------------|------------------------------------|-------------------------|-----------------|-------------------------|--------------------------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 1951 | | 3,600 | | | | |
| 1952 | | 3,600 | | | | |
| 1953 | | 3,600 | | | | |
| 1954 | | 3,600 | | | | |
| 1955 | | 4,200 | | | | |
| 1956 | | 4,200 | | | | |
| 1957 | | 4,200 | | | | |
| 1958 | | 4,200 | | | | |
| 1959 | | 4,800 | | | | |
| 1960 | | 4,800 | | | | |
| 1961 | | 4,800 | | | | |
| 1962 | | 4,800 | | | | |
| 1963 | | 4,800 | | | | |
| 1964 | | 4,800 | | | | |
| 1965 | | 4,800 | | | | |
| 1966 | | 6,600 | | | | |
| 1967 | | 6,600 | | | | |
| 1968 | | 7,800 | | | | |
| 1969 | | 7,800 | | | | |
| 1970 | | 7,800 | | | | |
| 1971 | | 7,800 | | | | |
| 1972 | | 9,000 | | | | |
| 1973 | | 10,800 | | | | |
| 1974 | | 13,200 | | | | |
| 1975 | | 14,100 | | | | |
| 1976 | | 15,300 | | | | |
| 1977 | | 16,500 | | | | |
| 1978 | | 17,700 | | | | |
| 1979 | | 22,900 | | | | |
| 1980 | | 25,900 | | | | |
| 1981 | | 29,700 | | | | |
| 1982 | | 32,400 | | | | |
| 1983 | | 35,700 | | | | |
| 1984 | | 37,800 | | | | |
| 1985 | | 39,600 | | | | |
| 1986 | | 42,000 | | | | |
| 1987 | | 43,800 | | | | |
| 1988 | | 45,000 | | | | |
| 1989 | | 48,000 | | | | |
| 1990 | | 51,300 | | | | |
| 1991 | | 53,400 | | | | |
| 1992 | | 55,500 | | | | |
| 1993 | | 57,600 | | | | |
| 1994 | | 60,600 | | | | |
| 1995 | | 61,200 | | | | |
| 1996 | | 62,700 | | | | |
| 1997 | | 65,400 | | | | |
| 1998 | | 68,400 | | | | |
| 1999 | | 72,600 | | | | |
| 2000 | | 76,200 | | | | |
| 2001 | | 80,400 | | | | |
| 2002 | | 84,900 | | | | |
| 2003 | | 87,000 | | | | |

Worksheet 2: Computing the primary insurance amount (PIA) for workers retiring after age 62

| Year | 1st bend point (dollars) | 2nd bend point (dollars) | Cost-of-living increase (percent) | Cost-of-living factor | Years aged 62 or older | PIA (dollars) |
|------------|--------------------------|--------------------------|-----------------------------------|-----------------------|------------------------|---------------|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| Age 62 PIA | | | | | | |
| 1979 | 180 | 1,085 | 9.9 | 1.099 | | |
| 1980 | 194 | 1,171 | 14.3 | 1.143 | | |
| 1981 | 211 | 1,274 | 11.2 | 1.112 | | |
| 1982 | 230 | 1,388 | 7.4 | 1.074 | | |
| 1983 | 254 | 1,528 | 3.5 | 1.035 | | |
| 1984 | 267 | 1,612 | 3.5 | 1.035 | | |
| 1985 | 280 | 1,691 | 3.1 | 1.031 | | |
| 1986 | 297 | 1,790 | 1.3 | 1.013 | | |
| 1987 | 310 | 1,866 | 4.2 | 1.042 | | |
| 1988 | 319 | 1,922 | 4.0 | 1.040 | | |
| 1989 | 339 | 2,044 | 4.7 | 1.047 | | |
| 1990 | 356 | 2,145 | 5.4 | 1.054 | | |
| 1991 | 370 | 2,230 | 3.7 | 1.037 | | |
| 1992 | 387 | 2,333 | 3.0 | 1.030 | | |
| 1993 | 401 | 2,420 | 2.6 | 1.026 | | |
| 1994 | 422 | 2,545 | 2.8 | 1.028 | | |
| 1995 | 426 | 2,567 | 2.6 | 1.026 | | |
| 1996 | 437 | 2,635 | 2.9 | 1.029 | | |
| 1997 | 455 | 2,741 | 2.1 | 1.021 | | |
| 1998 | 477 | 2,875 | 1.3 | 1.013 | | |
| 1999 | 505 | 3,043 | ^a 2.5 | 1.025 | | |
| 2000 | 531 | 3,202 | 3.5 | 1.035 | | |
| 2001 | 561 | 3,381 | 2.6 | 1.026 | | |
| 2002 | 592 | 3,567 | 1.4 | 1.014 | | |
| 2003 | 606 | 3,653 | 2.1 | 1.021 | | |
| 2004 | 612 | 3,689 | ... | ... | | |

NOTE: ... = not applicable.

- a. The December 1999 cost-of-living adjustment (COLA) was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to 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.

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Glossary and Abbreviations

Glossary

actuarial reduction (OASDI). Reduction in monthly benefit amount payable on—

1. Entitlement prior to full retirement age if the beneficiary is a retired worker, a wife or husband of a retired or disabled worker (with entitlement not based on caring for a child beneficiary), divorced spouse, a widow(er), or a surviving divorced spouse; or
2. Entitlement, in case of disability, at ages 50–59 if the beneficiary is a widow(er) or surviving divorced spouse. (For formulas used to compute the reduction, see "Benefit Types and Levels" in the section Social Security [Old-Age, Survivors, and Disability Insurance].)

administrative law judge—ALJ. An official of the Social Security Administration's (SSA's) Office of 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. See also **administrative review process**.

administrative review process (OASDI and SSI). The procedures followed by the Social Security Administration (SSA) in determining one's right under Title II and Title XVI of the Social Security Act. The administrative review process consists of several steps, which must usually be requested within certain time periods, in the following order: initial determination, reconsideration, decision of the administrative law judge, and a review by SSA's Appeals Council.

1. *Initial determination.* A determination SSA makes about an individual's entitlement to benefits or about any other matter that gives that person a right to further administrative and/or judicial review.
2. *Reconsideration.* The first step in the administrative review process. When an individual disagrees with the initial determination, the individual may, within 60 days of receiving notice of the initial determination, ask SSA to reconsider the decision.
3. *Hearing before an administrative law judge (ALJ).* When an individual disagrees with the reconsidered determination, he or she may, within 60 days of receiving notice of the determination, request a hearing before an ALJ.
4. *Appeals Council review.* When an individual disagrees with the decision or dismissal by the ALJ, he or she may, within 60 days of receiving the hearing decision, request that the Appeals Council review that decision. The Appeals Council, within the Office of Hearings and Appeals, may deny or dismiss the request for review, or grant the request and either issue a decision or remand (return) the case to an ALJ. The Appeals Council may also review any ALJ action on its own motion within 60 days after the ALJ's action. The Appeals Council's decision or the hearing decision if the Council denies the request for review, represents SSA's final decision in the administrative review process. See **expedited appeals process** and **federal court review**.

adult (SSI). A person older than age 21, aged 18–21 who is not regularly attending school, or a person under 21 who is married or the head of a household.

age (OASDI). In tables showing beneficiaries in current-payment status, the age classification is based on the age of the person at his or her last birthday. In tables showing awards data, age is the beneficiary's age in the month of award or age in year of the award, as specified.

aged beneficiary (OASDI). A person who qualifies for benefits on the basis of age rather than on the basis of a disability or caring for a child.

aged enrollee (Medicare). An individual, aged 65 or older, who is enrolled in the Medicare program.

aged person (SSI). A person aged 65 or older.

allowance (DI). A determination that a worker is entitled to a cash disability benefit award or to the establishment of a period of disability because of an inability to work by reason of any physical or mental impairment.

allowed charge (Medicare). An individual charge determined (approved amount) by a carrier for a covered medical service or supply.

annual maximum taxable limit (OASDI and HI). The dollar amount above which earnings in Social Security covered employment is neither taxable nor creditable for benefit computation purposes. (Also referred to as "contribution and benefit base," "annual creditable maximum," "maximum contribution and benefit base," "taxable maximum," and "maximum taxable.") Under the Hospital Insurance program, there is no upper limit on earnings subject to taxes. See Table 2.A3.

assigned claim (Medicare). A claim for which the physician or supplier agrees to accept the amount approved by Medicare as the total payment. The physician or supplier is paid 80 percent of the approved fee schedule (less any unmet deductible). The beneficiary can be charged only for the coinsurance, the remaining 20 percent of the approved amount. A participating physician or supplier agrees to accept assignment on all claims.

auxiliary benefit (OASDI). Monthly benefit payable to a spouse or child of a retired or disabled worker, or to a survivor of a deceased worker. (Also known as **dependents benefit**.)

average. See **mean**.

average indexed monthly earnings—AIME (OASDI). The resulting average monthly earnings of a worker after indexing of actual earnings to reflect the value of the individual's previous earnings relative to national average earnings in the indexing year. A formula is then applied to this figure to compute the primary insurance amount (PIA) for most workers who attain age 62, become disabled, or die after 1978. The indexing year is the second year before the year in which the worker attains age 62, becomes disabled, or dies. Taxable earnings after the indexing year are included at their actual value. For widow(er)'s first eligible after December 1984, the indexing year applicable to the deceased worker's earnings may alternatively be the second year before the widow(er)'s date of eligibility for survivors benefits if it results in a higher benefit.

Earnings are indexed by multiplying the worker's taxable earnings for each year after 1950 through the indexing year by the average wages of all workers for the indexing year, and dividing by the average wages of all workers for the year being indexed. Once the earnings have been indexed, the AIME is computed by—

1. Determining the number of computation years—the number of years after 1950 (or the year of attainment of age 21, if later) and up to the year in which the worker attains age 62, becomes disabled, or dies, minus dropout years, generally 5 (minimum number of computation years is 2);
2. Selecting the actual computation years, based on highest indexed earnings from any years after 1950; and

-
3. Dividing the sum of indexed earnings in the computation years by the total number of months in the computation years.

For workers entitled to disability benefits after June 1980, the number of dropout years varies by the age attained in year of disability onset. The number is 0, 1, 2, 3, 4, and 5 for workers aged 26 or younger, 27–31, 32–36, 37–41, 42–46, and 47 or older, respectively. Effective for months after June 1981, however, disabled workers under age 37 may obtain up to 3 additional dropout years (3, 2, and 1, respectively, for those aged 26 or younger, 27–31, and 32–36) for which the worker had no earnings and was living with a child (of the worker or his or her spouse) under age 3.

average monthly wage—AMW (OASDI). The amount of earnings used as the basis for determining the primary insurance amount (PIA) for workers who attained age 62, became disabled, or died before 1979, and also under a transitional guarantee computation for workers who attained age 62 in 1979–1983 or survivors of such workers, if the resulting PIA is higher than under the AIME method. The AMW is computed by—

1. Determining the number of computation years—the number of years after 1950 (or the year of attainment of age 21, if later) and up to the year in which the worker attains age 62 (age 65 for men born before January 2, 1911, and the later of age 62 or the year 1975 for men born after January 1, 1911), becomes disabled, or dies, minus dropout years, generally 5 (minimum number of computation years is 2);
2. Selecting the actual computation years, based on highest earnings (up to the amount of the annual maximum taxable earnings in each year), from any years after 1950; and
3. Dividing the sum of earnings in the computation years by the total number of months in the computation years.

See the last paragraph under AIME for special dropout rules for disabled workers.

An alternative computation method takes into account the worker's earnings after 1936, if it yields a higher PIA.

award (OASDI). A determination that an individual is entitled to a specified type of benefit. An award action is processed adding the individual to the Social Security benefit rolls maintained for that type of benefit and is counted as an award in a particular month. Award actions are processed not only for new beneficiaries but also for persons already on the rolls whose benefits in one category are terminated but who become entitled to another type of benefit. These actions are called conversions. When a disabled worker attains the full retirement age, the worker benefit and the benefits of spouses and children are converted to the retirement category. Upon the death of a disabled worker, benefits for children are converted to the survivor child category and benefits for spouses caring for these children are converted to widowed mothers and fathers benefits. Benefits for spouses of retired and disabled workers entitled because of age are converted to nondisabled widows and widowers benefits upon the death of the worker. The above conversions are counted in the award data. The benefits for children of retired workers that are converted to benefits for children of deceased workers upon the death of the worker are not counted in the award data.

base years (OASDI). For computing Social Security benefits, the years after 1950 up to the year a person is entitled to retirement or disability benefits. For a survivor's claim, the base years include the year of the worker's death.

bend points (OASDI). The dollar amounts defining the AIME (average indexed monthly earnings) or PIA (primary insurance amount) brackets in the benefit formulas. See Tables 2.A11 and 2.A13.

beneficiary (OASDI). A person who has been awarded benefits on the basis of his or her own or another's earnings record. The benefits may be either in current-payment status or withheld.

benefit period (Medicare). An alternate name for **spell of illness**.

benefit reduction (OASDI). See **actuarial reduction**.

benefit termination (OASDI). See **termination**.

benefits in force (OASDI). The sum of the number of persons with benefits in current-payment status and persons with benefits withheld.

benefits withheld (OASDI). See **withholding**.

Black Lung Benefits Program. Provides for monthly payments and medical treatment to coal miners totally disabled from pneumoconiosis (black lung disease) arising from employment in or around the nation's coal mines, augmented payments based on the number of miner's dependents, and payments to certain survivors of miners who died due to or while totally disabled from pneumoconiosis.

blind (OASDI and SSI). "Blindness" for Social Security purposes means either central visual acuity of 20/200 or less in the better eye with the use of a correcting lens, or a limitation in the fields of vision so that the widest diameter of the visual field subtends an angle of 20 degrees or less (tunnel vision).

buy-in (Medicare). A Medicare beneficiary who is also eligible for Medicaid and for whom Part B (Supplementary Medical Insurance) premiums are paid by a state Medicaid program.

capitation (Medicare). A prospective payment method that pays the provider of service a uniform amount for each person served, usually on a monthly basis. Capitation is used in managed care alternatives such as Health Maintenance Organizations.

carrier (Medicare). An entity that the Centers for Medicare & Medicaid Services contracts to process physician/other supplier claims and make payments for Part B (Supplementary Medical Insurance) services.

child (SSI). An unmarried blind or disabled person who is not the head of a household and who is either under age 18 or aged 18–21 and regularly attending school.

childhood disability benefit (OASDI). See **disabled child's benefit**.

child's benefit (OASDI). Monthly benefits payable to children of a retired or disabled worker or of a deceased worker who died either fully or currently insured. Benefits are payable to unmarried children under age 18 (up to age 19 if a full-time student attending elementary or secondary school) and to disabled children aged 18 or older who became disabled before age 22. Under certain circumstances, benefits can be paid to stepchildren, grandchildren, or adopted children. Benefits for disabled children may continue if they marry certain other Social Security beneficiaries.

claimant (OASDI and SSI). The person on whose behalf an application for benefits is filed.

coinsurance (Medicare). See **cost sharing**.

computation starting date (OASDI). December 31 of either 1936 or 1950. Taxable earnings after the applicable starting date are counted in computing average monthly earnings (only starting date of December 31, 1950 is applicable in computing average indexed monthly earnings).

consumer price index—CPI. A relative measure of inflation computed by the U.S. Department of Labor. The CPI charts the rise in costs for selected goods and services and is used to compute cost-of-living increases. In this report, all references to the CPI relate to the CPI for Urban Wage Earners and Clerical Workers (CPI-W).

continuing disability review (DI and SSI). A periodic review to determine if a disabled individual is still medically eligible to receive benefits.

contributions (OASDI and Medicare). The amount based on a percentage of earnings, up to an annual maximum, that must be paid by—

1. Employers and employees on wages from employment under FICA (Federal Insurance Contributions Act),
2. The self-employed on net earnings from self-employment under SECA (Self-Employment Contributions Act), and
3. States on the wages of state and local government employees covered under the Social Security Act through voluntary agreements under section 218 of the Act.

Generally, employers withhold contributions from wages, add an equal amount of contributions, and pay both on a current basis. Also referred to as "taxes." See Table 2.A3.

conversion of benefits (OASDI). See **awards (OASDI)**.

cost-of-living adjustment—COLA. Social Security benefits and Supplemental Security Income payments are increased each year to keep pace with increases in the cost of living (inflation). The consumer price index is used to compute COLA increases.

cost sharing (Medicare). The generic term that includes copayments, coinsurance, and deductibles.

- *Copayments*—Flat fees, typically modest, that insured persons must pay for a particular unit of services, such as an office visit, emergency room visit, or the filling of a prescription.
- *Coinsurance*—Portion of the costs paid by the beneficiary after meeting the annual deductible.
- *Deductibles*—The annual amount payable by the beneficiary for covered services before Medicare makes reimbursement.

couple (SSI). See **eligible couple**.

covered earnings (OASDI). Earnings in employment covered by the OASDI programs.

covered employment (OASDI). All employment and self-employment creditable for Social Security purposes.

covered worker (OASDI). A person who has earnings creditable for Social Security purposes on the basis of services for wages in covered employment or on the basis of income from self-employment.

current-payment status (OASDI). Status of a beneficiary who is paid a benefit for a given month, with or without deductions, provided the deductions add to less than a full month's benefit. The amount shown is prior to deduction for the Medicare Part B (Supplementary Medical Insurance) premium. A benefit in current-payment status at the end of a month is usually payable in the following month.

deductible (Medicare). The amount paid by enrollees for covered services before Medicare makes reimbursements.

- *Hospital Insurance*—Deductible applies to each new benefit period. It is determined each year by a formula specified by law, and approximates the current cost of a 1-day inpatient hospital stay.
- *Supplementary Medical Insurance*—Deductible is the first \$100 of covered charges per calendar year.

deeming (SSI). Takes into account the income and resources of certain persons who live with an SSI recipient when determining the amount of the payment. These persons include the ineligible spouses of adult recipients, the ineligible parents of child recipients under age 18, and the immigration sponsor for certain noncitizens.

delayed retirement credit (OASDI). A credit that increases the benefit amount for certain individuals who did not receive benefits for months after attainment of the full retirement age but before age 70. Delayed retirement credit increases apply for benefits beginning January of the year following the year the individual attains full retirement age.

Each monthly credit serves as a basis for increasing the monthly benefit (unless the benefit is based on a special minimum primary insurance amount) by specified percentages that depend on the year the worker attains age 62. The monthly credit was 1/12 of 1 percent for workers who attained age 62 before 1979 and 1/4 of 1 percent for workers who attained age 62 from 1979 through 1986. The corresponding monthly credits for workers who attain age 62 after 1986 are shown in Table 2.A20. The increase is applicable to the worker's monthly benefit amount but not to his or her PIA, therefore, auxiliary benefits are generally not affected. However, a widow(er)'s benefit may be increased based on the credit that had been applied to the benefit of the deceased worker or for which the worker was eligible at the time of death.

dependents benefit (OASDI). Monthly benefit payable to a spouse or child of a retired or disabled worker.

diagnosis-related groups (Medicare). A classification system that groups patients according to diagnosis, type of treatment, age, and other relevant criteria. Under the prospective payment system, hospitals are paid a set fee for treatment of patients in a single diagnosis-related groups (DRG) category, regardless of the actual cost of care for the individual.

diagnostic group (OASDI and SSI). 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 *International Classification of Diseases, 9th Revision, Clinical Modification (ICD-9-CM)*, using 4-digit ICD-9 codes. In 1985, the Social Security Administration implemented a 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.

direct deposit (OASDI and SSI). A method of payment whereby beneficiaries have their monthly benefits sent electronically to financial institutions they designate. Also referred to as electronic funds transfer (EFT).

disability (DI). The inability to engage in substantial gainful activity (SGA) by reason of any medically determinable physical or mental impairment that can be expected to result in death or can be expected to last for a continuous period of not less than 12 months. Special rules apply for workers aged 55 or older whose disability is based on blindness.

The law generally requires that a person be disabled continuously for 5 full months before he or she can qualify for a disabled-worker benefit.

disability (SSI). The inability to engage in substantial gainful activity (SGA) by reason of any medically determinable physical or mental impairment that can be expected to result in death or can be expected to last for a continuous period of not less than 12 months. This 12-month requirement does not apply to the blind.

The SGA criterion does not apply to children under age 18. The standard for them is a medically determinable physical or mental impairment which results in marked and severe functional limitations.

disabled child's benefit (OASDI). A monthly benefit payable to a disabled person aged 18 or older—a child or stepchild or eligible grandchild of retired, deceased, or disabled worker—whose disability began before age 22. (Also referred to as "disabled adult child.")

disabled enrollee (Medicare). A person under age 65 who has been entitled to disability benefits under Title II of the Social Security Act or Railroad Retirement system for at least 2 years.

disabled surviving divorced husband's benefit (OASDI). See **widow(er)'s benefit**.

disabled surviving divorced wife's benefit (OASDI). See **widow(er)'s benefit**.

disabled widow(er)'s benefit (OASDI). See **widow(er)'s benefit**.

disabled-worker benefit (DI). A monthly benefit payable to a disabled worker under full retirement age insured for disability. Before November 1960, disability benefits were limited to disabled workers aged 50–64.

divorced husband's benefit (OASDI). See **husband's benefit**.

divorced wife's benefit (OASDI). See **wife's benefit**.

drug addiction and alcoholism (OASDI and SSI). Legislation enacted in 1996 eliminated drug addiction and alcoholism (DA&A) as a basis for entitlement to Social Security and SSI disability benefits, effective January 1, 1997. Individuals for whom drugs and/or alcohol is deemed a contributing factor material to the determination of disability cannot be entitled to disability benefits.

dual entitlement (OASDI). Entitlement to a worker (primary) benefit and a higher secondary, usually a spouses or widow(er)'s benefit. The primary benefit is paid in full but the secondary benefit is paid only in the amount by which it exceeds the primary benefit. If the two benefits are financed from the same trust fund, the beneficiary is usually represented only once in the statistics, as a retired-worker or a disabled-worker beneficiary, and the benefit amount recorded is the larger amount associated with the auxiliary benefit. If the benefits are paid from different trust funds the beneficiary is

represented twice, and the respective benefit amounts are recorded for each type of benefit.

durable medical equipment (Medicare). Includes certain medical supplies and such items as hospital beds and wheel chairs used in a patient's home.

early retirement (OASDI). Retirement prior to the full retirement age.

earnings (OASDI and Medicare). All wages from employment and net earnings from self-employment, whether or not taxable or covered.

earnings test (OASDI). The provision requiring the withholding of benefits if nondisabled beneficiaries under full retirement age have earnings in excess of certain exempt amounts. See Table 2.A29.

eligible couple (SSI). Two persons living together as married, both of whom are eligible for SSI.

eligible individual (SSI). An aged, blind, or disabled person eligible for SSI.

eligible worker (OASDI). For retirement benefits, an individual who meets the insured status and age requirements for benefits whether or not he or she has filed an application; for Disability Insurance benefits, an individual who meets the insured status requirements and has established a period of disability.

emergency advance payments (SSI). Payments available at initial application for individuals who need cash assistance before their first Supplemental Security Income payment arrives. This advance is withheld from the first check.

end-stage renal disease (Medicare). Permanent kidney failure.

entitlement (OASDI). The state of meeting the applicable requirements for receipt of benefits, including the filing of an application. Entitlement can be retroactive and thus precede the date of award. The retroactive period can be 12 months for disabled workers, their spouses and children, and disabled widow(er)s. The maximum retroactive period for other types of benefits is 6 months. Retroactive benefits for months before full retirement age are not payable to a retired worker, a spouse, or a widow(er) if a permanent reduction of the monthly benefit amount would result. However, persons filing for a widow(er)'s benefit in the month immediately following the month of the worker's death may elect a 1-month retroactivity, even if reduced benefits would result. A person can be entitled to more than one benefit simultaneously. See **dual entitlement**.

expedited appeals process (OASDI and SSI). This permits an individual to go directly to a federal district court after review of the initial determination without first completing the administrative review process, if the only dispute is whether an applicable provision of the Social Security Act is constitutional. See **administrative review process**.

family benefit (OASDI). The sum of the individual monthly benefits payable to all the beneficiaries entitled on the basis of a single earnings record. See **maximum family benefit**.

family classification (OASDI). As used in statistical tables, the number and types of beneficiaries entitled to benefits on a single earnings record. Since the family classification is determined by the types of beneficiaries entitled, it can differ from actual family status. For example, a married couple is classified as a worker-and-spouse family if both persons are entitled on the earnings record of one of them. If both persons were

entitled on their own earnings record they would be designated as two worker-only families.

father's benefit (OASDI). A monthly benefit payable to a widower or surviving divorced father if (1) the deceased worker on whose account the benefit is paid was either fully or currently insured at the time of death and (2) an entitled child of the worker in his care is under age 16 or is disabled.

federal benefit rates (SSI). The basic benefit standards used in computing the amount of federal SSI payments. Benefit levels differ for individuals and couples living in households and for persons in Medicaid institutions. Individuals or couples living in their own households receive the full federal benefit. The federal benefit is reduced by one-third, if an individual or couple is living in another person's household and receiving support and maintenance there. The federal benefit rates are increased annually to reflect increases in the cost of living.

federal court review (OASDI and SSI). When an individual disagrees with SSA's final decision he or she may request judicial review by filing a civil action in a federal district court. See **administrative review process**.

federally administered payments (SSI). Federal SSI payments and state supplementation payments issued by the Social Security Administration on behalf of the states.

federally administered state supplementation (SSI). Cash payments provided by a state and issued by the Social Security Administration, which is also responsible for the maintenance of payment records. See **state supplementation**.

Food Stamp Program. The program issues monthly allotments of coupons that are redeemable at retail food stores, or provides benefits through electronic benefit transfer to help individuals and families with little or no income to buy food.

full retirement age—FRA (OASI). The age at which a person may first become entitled to unreduced retirement benefits. For persons attaining age 62 before 2000, the full retirement age is 65. Beginning with an increase to 65 years and 2 months for persons reaching age 65 in 2003, FRA is increasing gradually to 67 for persons reaching that age in 2027 or later. The higher full retirement age affects the benefit amount if a person chooses to receive benefits before attaining the FRA. See Table 2.A17.1.

government pension offset (OASDI). A law that affects spouse's or widow(er)'s benefits. Benefits are subject to reduction by any government pensions payable to the spouse on the basis of his or her own earnings in noncovered employment. The offset reduces the Social Security benefit amount by two-thirds of the amount of the government pension.

gross domestic product—GDP. The total dollar value of all goods and services produced by labor and property located in the United States, regardless who supplies the labor or property.

health maintenance organization—HMO (Medicare). Competitive medical plans, including Medicare+Choice, that have contracts with the Centers for Medicare & Medicaid Services on a prospective capitation basis for providing health care to Medicare beneficiaries.

home health agency (Medicare and Medicaid). A public or private organization that provides skilled nursing services and other therapeutic services in the patient's home and that meets certain conditions to ensure the health and safety of the individual.

home health services (Medicare and Medicaid). Items furnished in a patient's home under the care of physicians. These services are furnished under a plan established and periodically reviewed by a physician. They include part-time or intermittent skilled nursing care; physical, occupational, or speech therapy; medical social services; medical supplies and appliances (other than drugs and biologicals); home health aid services; and services of interns and residents.

hospice (Medicare and Medicaid). A public agency or private organization that is primarily engaged in providing pain relief, symptom management, and supportive services 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.

household (LIHEAP). 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.

husband's benefit (OASDI). Monthly benefit payable to a husband or a divorced husband (aged 62 or older) of a retired or disabled worker. See **spouse's benefit**.

independent laboratory services (Medicare). Diagnostic laboratory tests ordered by a physician and performed in a laboratory independent of a physician's office or a hospital.

inpatient hospital services (Medicare). Items and services furnished to an inpatient of a hospital by the hospital, including room and board, nursing and related services, diagnostic and therapeutic services, and medical or surgical services.

institutionalization (Medicaid and SSI). Living arrangements for persons in public or private institutions when more than 50 percent of the cost of their care is met by the Medicaid program.

insured status (OASDI). The state of having sufficient quarters of coverage to meet the eligibility requirements for retired-worker or disabled-worker benefits or to permit the worker's spouse and children or survivors to establish eligibility for benefits in the event of his or her disability, retirement, or death. (For qualifications for insured status, see "Insured Status" in the section Social Security [Old-Age, Survivors, and Disability Insurance].)

interim assistance (SSI). Payments made by a state or local government to Supplemental Security Income applicants while their claims are being adjudicated. Repayment is made from the first SSI payment.

intermediary (Medicare). An organization, selected by providers of health care, that has an agreement with the Centers for Medicare & Medicaid Services to process and pay institutional claims and perform other functions under the program.

life expectancy. The average number of years of life remaining at each tabulated birthday. See **life table (period)**.

life table (period). A period life table represents the mortality experience of an entire population during a relatively short period of time, usually 1–3 years. Such tables are useful for analyzing changes in the mortality experienced by a population through time. The table refers to a cohort of 100,000 people with the same birthday who experience the rate of mortality, or probability of death within 1 year, shown in the table, throughout their lives.

lifetime reserve (Medicare). Nonrenewable 60 days of inpatient hospital care to draw on if the 90 covered days per benefit period are exhausted. Patients are required to pay a daily coinsurance amount equal to one-half of the inpatient hospital deductible for each lifetime reserve day.

limitation of widow(er)'s benefit (OASDI). The reduction of the widow(er)'s benefit due to the early retirement of the deceased spouse. The benefit for a nondisabled widow(er) is limited to the larger of 82 1/2 percent of the deceased spouse's primary insurance amount, or the amount to which the deceased spouse would have been entitled if he or she were still alive. Thus, receipt of benefits by a worker before the full retirement age will result in a reduction of benefits for a widow(er), even if the widow(er) became entitled after his or her own full retirement age. Tables showing data on reduction for early retirement for nondisabled widow(er)s do not include those with limited benefits unless they became entitled before their own full retirement age. See **widow(er)'s benefit**.

Low-Income Home Energy Assistance Program—LIHEAP. Federal program to assist low-income households with heating and cooling costs.

low-income households (LIHEAP). 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.

lump-sum death benefit (OASDI). A one-time payment, generally \$255, payable on the death of a fully or currently insured worker. The lump sum is payable to the surviving spouse of the worker, under most circumstances, or if there is no spouse, to the worker's entitled children.

managed care (Medicare). Includes health maintenance organizations (HMOs), competitive medical plans (CMPs), and other plans that provide health services on a prepayment basis which is either based on cost or risk depending on the type of contract they have with Medicare. See also **Medicare+Choice**.

mandatory minimum state supplementation (SSI). Required by federal law for individuals converted to the Supplemental Security Income program from state assistance programs for the aged, blind, or disabled. This provision insures that monthly income will not be less than the amount received under the former state programs.

maximum family benefit (OASDI). The maximum monthly amount that can be paid on a worker's earnings record. Whenever the total of the individual monthly benefits payable to all the beneficiaries entitled on one earnings record exceeds the maximum, each dependents or survivors benefit is proportionately reduced to bring the total within the maximum. Benefits payable to divorced spouses or surviving divorced spouses are not reduced under the family maximum provision. Tables 2.A13, 2.A14, and 2.A17 give the formulas for computing the maximum family benefit.

maximum taxable (OASDI and Medicare). See **annual maximum taxable limit**.

mean. The arithmetic mean is calculated by dividing the sum of all of the values of a variable by the number of cases. The term "average" used in this publication refers to the arithmetic mean. See also **median**.

median. The median is a measure of central value which identifies that value that divides a distribution in half such that an equal number of cases fall below it as there are above it. See also **mean**.

Medicaid. A federal-state program that provides medical assistance for certain individuals and families with low incomes and limited resources.

medical savings account (Medicare). A plan that provides benefits after a single high deductible is met. Medicare makes an annual deposit to the medical savings account (MSA), and the beneficiary is expected to use that money to pay for medical expenses above the annual deductible. MSAs are currently a test program.

medically needy (Medicaid). Persons who would be eligible for Medicaid under one of the program's mandatory or optional groups, except that their income or resources are above the eligibility level set by their state. The states may extend eligibility to these otherwise qualified persons by allowing them to "spend down" to Medicaid eligibility by incurring medical or remedial care expenses to offset their excess income, thereby reducing it to a level below the maximum allowed by that state's Medicaid plan.

Medicare. A federally administered health insurance program that covers the cost of hospitalization, medical care, and some related services for most persons aged 65 or older. Also covers persons receiving Social Security Disability Insurance payments for 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).

Medicare+Choice. 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.

Medicare economic index. An index that is often used in the calculation of the increases in the prevailing charge levels that help to determine allowed charges for physician services. In 1991 and later, this index is considered in connection with the update factor for the physician fee schedule.

Medigap (Medicare). A term used for private health insurance that pays, within limits, most of the health care service charges not covered by Part A (Hospital Insurance) or Part B (Supplementary Medical Insurance).

military wage credits (OASDI and Medicare). Credits recognizing that military personnel receive wages in kind (such as food and shelter) in addition to their basic pay and other cash payments. Noncontributory wage credits of \$160 are provided for each month of active military service from September 16, 1940, through December 31, 1956. For years after 1956, the basic pay of military personnel is covered under the Social Security program on a contributory basis. See Table 2.A2 for amounts of noncontributory wage credits for 1957–2001. Noncontributory wage credits were eliminated for all years after 2001.

minimum benefit (OASDI). The lowest benefit (before actuarial reduction) payable to a retired worker, a disabled worker, or a sole survivor of a deceased worker. The minimum benefit was eliminated for most workers who attain age 62, become disabled, or die after 1981.

monthly benefit (OASDI). The amount payable after reduction, if necessary, for age, family maximum, and other reasons but before any deduction for Supplementary Medical Insurance (SMI) premiums. Effective June 1982, the final benefit payment is rounded

to the next lowest \$1 (if not already a multiple of \$1) after reduction for age, family maximum, and other reasons and after any deduction for SMI premiums. The tables in this publication reflect the monthly benefit credited (MBC) which is calculated as follows:

1. Subtract the SMI premium from the monthly benefit amount;
2. Round the above result down to the nearest whole dollar; and
3. Add back the SMI premium to the rounded result from 2 above.

For example, if a monthly benefit amount is \$895.00, and an SMI premium of \$66.60 is deducted, the MBC is \$894.60 (calculated as follows: $\$895.00 - \$66.60 = \$828.40$ rounded down to $\$828.00 + \$66.60 = \$894.60$).

mother's benefit (OASDI). A monthly benefit payable to a widow or surviving divorced mother if (1) the deceased worker on whose account the benefit is paid was either fully or currently insured at the time of his death and (2) the entitled child of the worker is in her care and is under age 16 or disabled.

nondisabled widow(er)'s benefit (OASDI). See **widow(er)'s benefit**.

nonpayment status (OASDI). See **withholding**.

normal retirement age (OASI). See **full retirement age**.

old-age benefit (OASI). See **retired-worker benefit**.

Old-Age, Survivors, and Disability Insurance—OASDI. The Social Security programs that pay monthly cash benefits to:

1. Retired-worker (old-age) beneficiaries and their spouses and children and to survivors of deceased insured workers (OASI), and
2. Disabled-worker beneficiaries and their spouses and children and for providing rehabilitation services to the disabled (DI).

optional state supplementation (SSI). May be provided by states to bring the combined Supplemental Security Income and state payment to an amount more nearly commensurate with their costs of living than is the SSI payment alone.

outpatient services (Medicare). Services furnished to outpatients by a participating hospital for diagnosis or treatment of an illness or injury.

own household (SSI). A definition used to determine the federal benefit rates. Applies to adults who own their living quarters, are liable for the rent, pay their pro rata shares of household expenses, are living in households composed only of recipients of public income-maintenance payments, are placed by agencies in private households, and children living in their parent's household. See **federal benefit rates**.

parent's benefit (OASDI). Monthly benefit payable to a dependent parent aged 62 or older of a deceased fully insured worker.

payment status (OASDI). The state or condition of a benefit with respect to actual receipt by the beneficiary—that is, whether the benefit is in current-payment status or withheld.

peer review organization (Medicare). A group of practicing physicians and other health care professionals, paid by the federal government, to review the care given to Medicare patients.

physician services (Medicare). Services provided by an individual licensed under state law to practice medicine or osteopathy. Services provided by hospitals are not covered by this provision.

preferred provider organization (Medicare). An arrangement between a provider network and a health insurance or a self-insured employer. Providers generally accept payments less than traditional fee for service payments in return for a potentially greater share of the patient market. Preferred provider organization enrollees are not required to use the preferred providers, but are given financial incentives to do so, such as reduced coinsurance and deductibles. Providers do not accept financial risk for the management of care.

presumptive disability or blindness (SSI). For certain diagnoses, where there is high probability of a favorable medical determination of disability or blindness, payments may be made for up to 6 months before the formal determination if the applicant meets the other eligibility qualifications.

primary insurance amount—PIA (OASDI). The primary insurance amount is related to a worker's average monthly wage or average indexed monthly earnings. The PIA is used to compute all types of benefits payable on the basis of an individual's earnings record. Retired workers electing benefits at the full retirement age and disabled workers who did not receive a retirement benefit reduced for age receive a benefit equal to the PIA. Dependents and survivors of workers receive specified percentages of the PIA subject to the family maximum and entitlement before the full retirement age.

primary insurance amount formula (OASDI). The mathematical formula relating the primary insurance amount (PIA) to the AIME (average indexed monthly earnings) for workers who attain age 62, become disabled, or die after 1978. The PIA is equal to the sum of 90 percent of AIME up to the first bend point, plus 32 percent of AIME above the first bend point up to the second bend point, plus 15 percent of AIME in excess of the second bend point. Automatic benefit increases are applied beginning with the year of eligibility.

prospective payment system (Medicare). A method of reimbursement for hospitals that was implemented effective with hospital cost reporting periods beginning on or after October 1, 1983. Under this system, Medicare payment is made at a predetermined, specific rate for each discharge. All discharges are classified according to a list of diagnosis-related groups.

Prouty benefit (OASI). See **special age-72 benefit**.

provider (Medicare and Medicaid). *Medicare*—A provider is a facility, supplier, or physician who furnishes medical services. *Medicaid*—A provider is a person, group, or agency who provides covered services to enrollees.

qualified Medicare beneficiaries (Medicare and Medicaid). Qualified Medicare Beneficiaries are persons with incomes at or below 100 percent of the federal poverty level and resources at or below 200 percent of the Supplemental Security Income limit. Medicaid pays the Medicare (Parts A and B) premiums and the coinsurance and deductibles, subject to limits that states may impose on payment rates.

quarters of coverage (OASDI and Medicare). The crediting of coverage needed for insured status. A worker receives 1 quarter of coverage (up to a total of 4) for a designated amount of annual earnings reported from employment or self-employment. This dollar amount is subject to annual automatic increases in proportion to increases in average earnings. For amounts in years 1939 to present, see Table 2.A7. No more than 4 quarters of coverage may be credited for any calendar year, and no quarter of

coverage is credited after the quarter in which death occurred or for a quarter entirely included in a period of disability.

Railroad Retirement. A federal insurance program designed for workers in the railroad industry. The provisions of the Railroad Retirement Act provide for a system of coordination and financial interchange between the Railroad Retirement program and the Social Security program.

reasonable cost (Medicare). Intermediaries and carriers use the Centers for Medicare & Medicaid Services guidelines to determine reasonable costs incurred by providers in furnishing covered services to enrollees. Reasonable cost is based on the actual cost of providing such services, including direct and indirect costs of providers and excluding any costs that are unnecessary in the efficient delivery of services covered by the Hospital Insurance program.

redetermination (SSI). The periodic review of eligibility for each Supplemental Security Income recipient to ensure that eligibility continues and that payments are in the proper amount.

reduction for early retirement (OASDI). See **actuarial reduction**.

representative payee (OASDI and SSI). A person designated by the Social Security Administration to receive monthly benefits on behalf of a beneficiary when such action appears to be in the beneficiary's best interest. A representative payee is appointed for an adult beneficiary when the beneficiary is physically or mentally incapable of managing his or her own funds. In addition, a payee is usually appointed to receive benefits on behalf of a child under age 18.

retired-worker (old-age) benefit (OASI). Monthly benefit payable to a fully insured retired worker aged 62 or older, or to a person entitled under the transitionally insured status provision in the law. Retired-worker benefit data do not include special age-72 benefits, unless indicated.

retirement age (OASI). The age at which an individual establishes entitlement to retirement benefits. See **full retirement age**.

retirement earnings test (OASDI). See **earnings test**.

secondary benefit (OASDI). Monthly benefit payable to a spouse or child of a retired or disabled worker, or to a survivor of a deceased worker.

Section 1619(a) (SSI). See **special cash payments**.

Section 1619(b) (SSI). See **special recipient status**.

self-employed (OASDI and HI). One who derives income from the operation of a partnership or nonincorporated trade or business.

skilled nursing facility (Medicare). An institution that has a transfer agreement with one or more participating hospitals, is primarily engaged in providing skilled nursing care and rehabilitative services to inpatients, and meets specific regulatory certification requirements.

Social Security number (OASDI and HI). A nine-digit number used to identify the record of earnings an individual has in employment or self-employment covered by Social Security and Medicare.

Social Security Act. Public Law 74-271, enacted August 14, 1935, with subsequent amendments. The Social Security Act consists of 20 titles, of which four have been repealed.

special age-72 benefit (OASI). Monthly benefit payable to men who attained age 72 before 1972 and to women who attained age 72 before 1970 and who do not have sufficient quarters of coverage to qualify for a retired-worker benefit under either the fully or the transitionally insured status provisions. (Also known as **Prouty benefits**.)

special cash payments (SSI). Continuing cash benefits for disabled individuals whose gross earned income is at the amount designated as the substantial gainful activity level. The person must continue to be disabled and meet all other eligibility rules.

special minimum PIA (OASDI). An alternative primary insurance amount (PIA) based on the worker's length (years) of covered employment. It is designed to help those who worked in covered employment for many years but had low earnings. See Table 2.A12 for computation of the special minimum PIA.

special recipient status (SSI). For Medicaid purposes, provides special status to working disabled or blind individuals when their earnings make them ineligible for cash payments.

specified low-income Medicare beneficiaries (Medicare and Medicaid). Persons who meet all Qualified Medicare Beneficiary requirements except that their incomes are slightly higher, though less than 120 percent of the federal poverty level. Medicaid pays their Part B (Supplementary Medical Insurance) premium.

spell of illness (Medicare). A period of consecutive days beginning with the first day on which a beneficiary is furnished inpatient hospital or extended care services and ending with the close of the first period of 60 consecutive days thereafter in which the beneficiary is in neither a hospital or skilled nursing facility.

spouse's benefit (OASDI). Monthly benefit payable to a spouse or a divorced spouse of a retired or disabled worker under one of the following conditions:

1. The spouse is aged 62 or older or has an entitled child of the worker in his or her care who is under age 16 or is disabled; or
2. The divorced spouse is aged 62 or older and was married to the worker for 10 years before the divorce became final. Effective with benefits payable after December 1984, a divorced spouse of an eligible worker can be entitled to benefits if he or she meets the requirements for entitlement and has been divorced for at least 2 years, regardless of whether the worker has filed for benefits or has benefits withheld due to the earnings test. Effective with benefits payable beginning January 1991, the 2-year period is waived if the worker was entitled to benefits before the divorce. The earnings test will continue to apply to the divorced spouse's own earnings; or
3. Effective with benefits payable beginning January 1991, a deemed spouse (including a divorced deemed spouse), regardless of whether the legal spouse is entitled to benefits on the same earnings record. A deemed spouse is a person who entered into an invalid ceremonial marriage in good faith.

state-administered supplementation (SSI). See **state supplementation**.

state supplementation (SSI). Payments to eligible persons made under state provisions. These payments may vary by the recipient's living situation and by geographic area within the state. The payments are federally and state administered.

student benefit (OASDI). Child's benefit payable to a full-time unmarried elementary or secondary school student aged 18–19. Student benefits end at age 19 or at the end of the current semester or quarter, whichever is later.

substantial gainful activity—SGA (DI and SSI). Remunerative work that is substantial, as determined from considering the amount of money earned, and or the number of hours worked, and the nature of the work. See Table 2.A30 for money amounts.

Supplemental Security Income—SSI. Program for the needy aged, blind, and disabled. Replaced the former federal-state programs of Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled.

surviving divorced father's benefit (OASI). See **father's benefit**.

surviving divorced mother's benefit (OASI). See **mother's benefit**.

surviving divorced spouse's benefit (OASI). See **widow(er)'s benefit**.

survivors benefit (OASI). Benefit payable to a survivor of a deceased insured worker.

suspended benefit (OASDI). A benefit not in current-payment status.

taxable earnings (OASDI and HI). Wages and/or self-employment income that is under the applicable annual maximum taxable limit.

taxable maximum (OASDI and HI). See **annual maximum taxable limit**.

taxable self-employment income (OASDI and HI). The maximum amount of net earnings from self-employment by an earner which, when added to any taxable wages, does not exceed the contribution and benefit base. For Hospital Insurance beginning in 1994, all net earnings from self-employment.

taxable wages (OASDI and HI). See **taxable earnings**.

taxes (OASDI and HI). See **contributions**.

technical entitlement. A technical entitlement occurs when a beneficiary is entitled to benefits on more than one earnings record but is eligible to receive benefits on only one earnings record. There are two types of technical entitlement: (1) Simultaneous technical entitlement: beneficiary is entitled to the same type of benefit on more than one earnings record; (2) Potential dual entitlement: the secondary benefit amount potentially exceeds the primary benefit, but reduction for age or family maximum causes the primary benefit to exceed the secondary benefit amount.

Temporary Assistance for Needy Families—TANF. Created by the Personal Responsibility and Work Opportunities Reconciliation Act of 1996, TANF provides assistance and work opportunities to needy families. Replaced Aid to Families with Dependent Children (AFDC), Emergency Assistance, and Job Opportunities and Basic Skills Training (JOBS) programs.

Temporary Disability Insurance—TDI. Sometimes called cash sickness benefits, TDI provides workers with partial compensation for loss of wages caused by temporary nonoccupational disability. Only five states, Puerto Rico, and the railroad industry have TDI laws.

termination (OASDI). Cessation of payment of a specific type of benefit because the beneficiary is no longer entitled to receive it. For example, benefits might terminate as a

result of the death of the beneficiary, the recovery of a disabled beneficiary, or the attainment of age 18 by a child beneficiary. In some cases, the individual may become immediately entitled to another type of benefit (such as the conversion of a disabled-worker beneficiary at full retirement age to a retired-worker beneficiary).

totalization (OASDI). International agreements that coordinate the U.S. Social Security programs with the Social Security programs of other countries are called "totalization agreements."

Thrifty Food Plan (Food Stamp Program). 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.

trust fund (OASDI and Medicare). Four separate accounts in the U.S. Treasury in which are deposited the equivalent of taxes received under the Federal Insurance Contributions Act, the Self-Employment Contributions Act, contributions dealing with coverage of state and local government employees, any sums received under the financial interchange with the railroad retirement account, voluntary hospital and medical insurance premiums, and transfers of federal general revenues. Funds not withdrawn for current monthly or service benefits, the financial interchange, and administrative expenses are invested in interest-bearing federal securities, as required by law.

The interest earned is also deposited in the trust funds.

1. Old-Age and Survivors Insurance (OASI). The trust fund used for paying monthly benefits to retired-worker (old-age) beneficiaries and their spouses and children and to survivors of insured workers.
2. Disability Insurance (DI). The trust fund used for paying monthly benefits to disabled-worker beneficiaries and their spouses and children and for providing rehabilitation services to the disabled.
3. Hospital Insurance (HI). The trust fund used for paying part of the costs of inpatient hospital services and related post-hospital care for aged and disabled individuals who meet the eligibility requirements.
4. Supplementary Medical Insurance (SMI). The trust fund used for paying part of the costs of physicians' services, outpatient hospital services, and other related medical and health services for voluntarily insured aged and disabled individuals.

Unemployment Insurance. A federal-state coordinated program that provides partial income replacement to regularly employed members of the labor force who become involuntarily unemployed. All 50 states, the District of Columbia, Puerto Rico, and the Virgin Islands have unemployment insurance programs.

veterans' benefits. A variety of benefits and services to veterans and their dependents and survivors that include, but are not limited to disability compensation, benefits for survivors, health care benefits, and educational assistance and training.

widowed father's benefit (OASI). See **father's benefit**.

widowed mother's benefit (OASI). See **mother's benefit**.

widow(er)'s benefit (OASDI). Monthly benefit payable to a widow(er) or surviving divorced widow(er) of a worker fully insured at the time of death, if he or she is (1) aged 60 or older or (2) aged 50–59 and has been disabled throughout a waiting period of 5 consecutive calendar months that began no later than 7 years after the month in which the worker died or after the end of his or her entitlement to benefits as a widowed mother or father.

A surviving divorced widow(er)'s marriage to a worker must have lasted 10 years before the divorce became final. Effective for benefits payable after December 1983, benefits are continued for disabled widow(er)s and surviving divorced widow(er)s who remarry after the age of first eligibility for benefits.

Effective January 1991, benefits may be payable to a deemed widow(er), including a divorced deemed widow(er). A deemed widow(er) is a person who entered into an invalid ceremonial marriage in good faith.

wife's benefit (OASDI). A monthly benefit payable to a wife or divorced wife of a retired or disabled worker. See **spouse's benefit**.

windfall elimination provision—WEP (OASI and DI). A modified benefit formula for determining the primary insurance amount, which eliminates the windfall in benefits for individuals who have only minimal Social Security coverage and will receive a pension based on years of work in noncovered employment. This formula prevents a 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

withholding (OASDI). Suspension of benefit payments until the condition(s) causing deductions are known to have ended. The suspension does not affect eligibility for Hospital Insurance benefits.

worker (OASDI). A person who has earnings creditable for Social Security purposes on the basis of services for wages in covered employment or on the basis of income from covered self-employment. Data on covered self-employment exclude self-employed persons who had no self-employment income taxable or creditable under Social Security because they had wages or salaries reaching the annual taxable maximum reported for the same year.

workers' compensation and public disability benefit offset (DI). A requirement that reduces the benefits to a disabled worker and dependents if the worker also receives workers' compensation (WC) or other public disability benefits (PDB). The reduction continues until the month the worker reaches age 65 or the month the WC/PDB payments stop, whichever comes first.

Abbreviations

| | |
|-----------------|---|
| AB | Aid to the Blind |
| ACF | Administration for Children and Families |
| AET | Annual earnings test |
| AFDC | Aid to Families with Dependent Children |
| AFDC-UP | Aid to Families with Dependent Children-Unemployed Parents |
| AIDS | Acquired immune deficiency syndrome |
| AIME | Average indexed monthly earnings |
| AMW | Average monthly wage |
| APTD | Aid to the Permanently and Totally Disabled |
| BBA | Balanced Budget Act of 1997 |
| BC/BS | Blue Cross/Blue Shield |
| CDR | Continuing disability review |
| CHAMPVA | Civilian Health and Medical Program of the Department of Veterans Affairs |
| CLIA | Clinical Laboratory Improvement Act |
| CMP | Competitive medical plans |
| CMS | Centers for Medicare & Medicaid Services |
| COBRA | Consolidated Omnibus Budget Reconciliation Act |
| COLA | Cost-of-living adjustment |
| CPI-U | Consumer price index for all urban consumers |
| CPI-W | Consumer price index for urban wage earners and clerical workers |
| CPS | Current Population Survey |
| DA&A | Drug addiction and alcoholism |
| DI | Disability Insurance |
| DME | Durable medical equipment |
| DOE | Department of Energy |
| DOL | Department of Labor |
| DRG | Diagnosis-related group |
| EA | Emergency Assistance |
| EBT | Electronic benefit transfer |
| EPSDT | Early and Periodic Screening, Diagnostic, and Treatment program |
| ESRD | End-stage renal disease |
| FERS | Federal Employees Retirement System |
| FFS | Fee for service |
| FICA | Federal Insurance Contributions Act |
| FMAP | Federal medical assistance percentage |
| FPL | Federal poverty level |
| FQHC | Federally qualified health center |
| FRA | Full retirement age |
| FUTA | Federal Unemployment Tax Act |
| FY | Fiscal year |
| GDP | Gross domestic product |
| HCBS | Home and community based services |
| HCFA | Health Care Financing Administration |

| | |
|----------------|--|
| HHA | Home health agency |
| HHS | Department of Health and Human Services |
| HI | Hospital Insurance |
| HIV | Human immunodeficiency virus |
| HMO | Health maintenance organization |
| ICF | Intermediate care facility |
| ICFs/MR | Intermediate care facilities for the mentally retarded |
| JOBS | Job Opportunities and Basic Skills Training |
| LIHEAP | Low-Income Home Energy Assistance Program |
| LTC | Long-term care |
| MBC | Monthly benefit credited |
| MBR | Master Beneficiary Record |
| MCCA | Medicare Catastrophic Coverage Act |
| MCCRA | Medicare Catastrophic Coverage Repeal Act |
| MN | Medically needy |
| MOE | Maintenance of effort |
| MSA | Medical savings account |
| NEW | Native Employment Works |
| NRC | National Research Council |
| OAA | Old-Age Assistance |
| OASDI | Old-Age, Survivors, and Disability Insurance |
| OASI | Old-Age and Survivors Insurance |
| OBRA | Omnibus Budget Reconciliation Act |
| OEO | Office of Economic Opportunity |
| OMB | Office of Management and Budget |
| PACE | Programs of all-inclusive care for the elderly |
| PESS | Property essential to self-support |
| PIA | Primary insurance amount |
| PIB | Primary insurance benefit |
| PPO | Preferred provider organization |
| PPS | Prospective payment system |
| PRO | Peer review organization |
| PSO | Provider-sponsored organization |
| QC | Quarter of coverage |
| QDWIS | Qualified disabled working individuals |
| QI | Qualified individual |
| QMB | Qualified Medicare beneficiary |
| REACH | Residential Emergency Assistance Challenge |
| RVS | Relative value scale |
| SCHIP | State Children's Health Insurance Program |
| SECA | Self-Employment Contributions Act |
| SGA | Substantial gainful activity |
| SIPP | Survey of Income and Program Participation |
| SLMB | Specified low-income Medicare beneficiary |
| SMI | Supplementary Medical Insurance |

| | |
|--------------|--|
| SNF | Skilled nursing facility |
| SSA | Social Security Administration |
| SSI | Supplemental Security Income |
| TANF | Temporary Assistance for Needy Families |
| TEFRA | Tax Equity and Fiscal Responsibility Act |
| TFP | Thrifty Food Plan |
| TWP | Trial work period |
| USDA | U.S. Department of Agriculture |
| VA | Department of Veterans Affairs |
| VEAP | Veterans' Educational Assistance Program |
| WEP | Windfall Elimination Provision |
| WIN | Work Incentive Program |

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