


ANNUAL STATISTICAL SUPPLEMENT TO THE SOCIAL SECURITY BULLETIN, 2011



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Preface

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

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

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

Your suggestions and comments on this report are welcome. Any suggestions, comments, or general questions about the report should be directed to Angela Y. Harper at 410-965-0090 or statistics@ssa.gov. For specific questions about the data, please call or e-mail the contact listed under each table or section. This report is available on our website at <http://www.socialsecurity.gov/policy>, as are the *SSI Annual Statistical Report*, the *Annual Statistical Report on the Social Security Disability Insurance Program*, and other reports. For additional copies of this report, please e-mail op.publications@ssa.gov.

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

February 2012

Errata Policy

If there are any additions or corrections to the data published herein, they will be posted as errata on the web at <http://www.socialsecurity.gov/policy/docs/statcomps/supplement/2011/index.html>.

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A vertical strip on the left side of the page features a grayscale image of the American flag, showing the stars and stripes.

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Social Security (Old-Age, Survivors, and Disability Insurance)

Employment and Earnings

Workers in OASDI covered employment, 2010	156.7 million
Average earnings, 2010	\$40,410
Earnings required in 2011 for—	
1 quarter of coverage	\$1,120
Maximum of 4 quarters of coverage	\$4,480
Earnings test exempt amounts for 2011	
Under full retirement age for entire year	\$14,160
For months before reaching full retirement age in 2011	\$37,680
Beginning with month of reaching full retirement age in 2011	Test eliminated

Program Data

Cost-of-living adjustment for December 2010	0.0 percent
Average monthly benefit, December 2010	
Retired workers	\$1,176
Widows and widowers, nondisabled	\$1,134
Disabled workers	\$1,068
Number of beneficiaries, December 2010	
Old-Age, Survivors, and Disability Insurance	54.0 million
Old-Age Insurance	
Total	37.5 million
Retired workers	34.6 million
Survivors Insurance	
Total	6.4 million
Widows and widowers, nondisabled	4.0 million
Disability Insurance	
Total	10.2 million
Disabled workers	8.2 million
Benefit payments, 2010	
Old-Age, Survivors, and Disability Insurance	\$701.6 billion
Old-Age and Survivors Insurance	\$577.4 billion
Disability Insurance	\$124.2 billion
Administrative expenses, 2010	
Old-Age and Survivors Insurance	
Amount	\$3.5 billion
As a percentage of total benefits paid	0.6 percent
Disability Insurance	
Amount	\$3.0 billion
As a percentage of total benefits paid	2.4 percent

Program Trends

- About 54.0 million persons received Social Security benefits for December 2010, an increase of 1,509,149 (2.9 percent) since December 2009. Sixty-nine percent were retired workers and their spouses and children, 12 percent were survivors of deceased workers, and 19 percent were disabled workers and their spouses and children.
- Seventy-four percent of the 34.6 million retired workers received reduced benefits because of entitlement prior to full retirement age. Relatively more women (76.4 percent) than men (71.4 percent) received reduced benefits.
- The number of beneficiaries aged 65 or older rose from about 34.0 million in 2005 to more than 37.2 million in 2010 (9.4 percent). The number of beneficiaries aged 85 or older increased at a greater rate during the 5-year period (16.7 percent), from fewer than 4.5 million in 2005 to more than 5.2 million in 2010. In 2010, about 51,000 centenarians were receiving Social Security.
- About 21.0 million women aged 65 or older received benefits for December 2010. About 9.3 million (44.0 percent) were entitled solely to a retired-worker benefit. About 6.2 million (29.4 percent) were dually entitled to a retired-worker benefit and a wife's or widow's benefit, and about 5.6 million (26.7 percent) were receiving wife's or widow's benefits only.
- More than 3.2 million children under age 18 received benefits, including 1,239,083 children of deceased workers, 1,660,196 children of disabled workers, and 309,512 children of retired workers.
- About 9.4 million persons received benefits based on disability—8,203,951 disabled workers, 949,200 disabled adult children, and 244,953 disabled widows and widowers. In addition, 160,300 spouses and 1,722,388 minor and student children of disabled workers received benefits.
- Average monthly benefits for December 2010 were \$1,176 for retired workers, \$1,068 for disabled workers, and \$1,134 for nondisabled widows and widowers. Among retired workers, monthly benefits averaged \$1,323 for men and \$1,023 for women. For disabled workers, average monthly benefits were \$1,191 for men and \$931 for women. No cost-of-living adjustment for 2011 went into effect in December 2010.
- Average monthly family benefits for December 2010 were \$2,133 for a widowed mother or father and children; \$1,838 for a disabled worker, wife, and children; and \$2,419 for a retired worker, wife, and children.
- Total OASDI benefit payments for calendar year 2010 were \$701.6 billion. Payments from the OASI trust fund were \$577.4 billion—an increase of 3.6 percent from the \$557.2 billion paid in 2009.
- Benefit payments from the DI trust fund, from which benefits are paid to disabled workers, their spouses, and children, increased by 5.0 percent from \$118.3 billion in 2009 to \$124.2 billion in 2010.
- OASDI benefit awards in calendar year 2010 totaled 5,697,011, including 2,634,439 to retired workers, 510,140 to their spouses and children, and 902,437 to survivors of insured workers. Benefits were awarded to 1,026,988 disabled workers and to 623,007 of their spouses and children.

Supplemental Security Income

Annual Payment Adjustments

Monthly federal benefit rate, effective January 2011	
Individual living in his or her own household	\$674
Couple with both members eligible	\$1,011
Cost-of-living adjustment	0.0 percent

Program Data

Federally administered payments	
Benefits paid in 2010	\$48.2 billion
Number of recipients, December 2010	7.9 million
Average benefit, December 2010	\$500.69
Federal SSI payments	
Benefits paid in 2010	\$44.6 billion
Number of recipients, December 2010	7.7 million
Average benefit, December 2010	\$478.73
Federally administered state supplementation	
Benefits paid in 2010	\$3.6 billion
Number of recipients, December 2010	^a 2.4 million
Average benefit, December 2010	\$124.29

a. Includes 2.1 million persons receiving federal SSI and state supplementation and 0.3 million persons receiving state supplementation only.

Program Trends

- In December 2010, 7,912,266 persons received federally administered SSI payments—235,580 more than the previous year. Of the total, 2,041,490 (25.8 percent) were aged 65 or older; 4,631,507 (58.5 percent) were blind or disabled aged 18–64; and 1,239,269 (15.7 percent) were blind or disabled under age 18.
- The number of blind or disabled aged 18–64 rose by 180,219 (4.0 percent) between December 2009 and December 2010, and the number under age 18 increased by 39,481 (3.3 percent).
- During 2010, 1,042,124 persons were awarded federally administered payments, an increase of 42,584 from the previous year. Of the 2010 awards, 731,265 went to blind or disabled recipients aged 18–64, 204,219 to those blind or disabled under age 18, and 106,640 to recipients aged 65 or older.
- Total federally administered SSI payments were \$48.2 billion in 2010, up 3.2 percent from 2009. Federal SSI payments in 2010 were \$44.6 billion (an increase of 4.6 percent over the previous year). Federally administered state supplementation totaled \$3.6 billion.

Health Care

Medicare

Total benefits paid in calendar year 2010	
Hospital Insurance (Part A)	\$244.5 billion
Supplementary Medical Insurance (Part B)	\$271.4 billion
Number of enrollees in July 2010 (one or both of Parts A and B)	47.7 million
Aged	39.6 million
Disabled	8.0 million
Administrative costs, 2010	
Hospital Insurance	
Amount	\$3.5 billion
As a percentage of total benefits paid	1.4 percent
Supplementary Medical Insurance	
Amount	\$3.5 billion
As a percentage of total benefits paid	1.3 percent

Medicaid

Medical service expenditures in fiscal year 2009	\$320.8 billion
Number of unduplicated recipients, fiscal year 2009	62.5 million
Average 2009 vendor payment per unduplicated recipient	
Persons aged 65 or older	\$15,169
Permanently and totally disabled persons	\$15,454
Dependent children under age 21	\$2,004
Average 2009 vendor payment for medical services	
Nursing facility services	\$29,448
Inpatient general hospital care	\$7,021
Prescribed drugs	\$940
Physicians services	\$498

Other Social Insurance Programs and Veterans' Benefits

Unemployment Insurance

Total payments, 2009	\$79.6 billion
Average—	
Weekly benefit amount (regular programs)	\$309.60
Duration of benefits	18.8 weeks
Weekly insured unemployment	5.7 million
Covered employment	126.5 million

Workers' Compensation

Benefit payments, 2009	\$58.3 billion
Compensation payments	\$29.4 billion
Medical and hospitalization	\$28.9 billion
Benefits paid by—	
Private insurance carriers	\$30.5 billion
State and federal funds	\$13.7 billion
Employers' self-insurance	\$14.2 billion
Covered workers per month	124.9 million
Costs as a percentage of covered payroll	1.30 percent

Temporary Disability Insurance

Average weekly benefit, 2008	
California	
State fund	\$417
Private plans	\$644
New York	
Private plans	\$195

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

Black Lung Benefits

Basic benefit to miner or widow	\$625
Maximum family benefit	\$1,251
Part B (claims filed before July 1, 1973)	
Number of monthly benefits to miners, widows, and dependents, December 2010	25,293
Total benefits paid, calendar year 2010	\$208.1 million
Part C (claims filed July 1, 1973, or later)	
Total benefits paid, fiscal year 2010	
Disability and survivors benefits	\$206.3 million
Medical benefits	\$31.0 million


Veterans' Benefits

Number of veterans with disability compensation or pension, 2010	
Service-connected disability	3,210,000
Nonservice-connected disability	314,000
Monthly payment in 2011 for—	
Service-connected disability	
10 percent disability	\$123
Total disability	\$2,673
Nonservice-connected disability (maximum payment)	
Without dependent	\$986
With one dependent and in need of aid and attendance	\$1,950

Poverty Data

Weighted average poverty thresholds, 2010	
Individual, aged 65 or older	\$10,458
Couple, householder aged 65 or older	\$13,194
Family of four	\$22,314
Percentage of population with income below poverty level, 2010	
All ages	15.1 percent
Children under age 18 living in families	21.4 percent
Persons aged 65 or older	9.0 percent

PROGRAM DESCRIPTIONS AND LEGISLATIVE HISTORY



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Social Security (Old-Age, Survivors, and Disability Insurance)

The Old-Age, Survivors, and Disability Insurance (OASDI) program provides monthly benefits to qualified retired and disabled workers and their dependents and to survivors of insured workers. Eligibility and benefit amounts are determined by the worker's contributions to Social Security. There is no means test to qualify for benefits, although there is a limit on income earned from working that applies to those under the full retirement age.

At the end of December 2010, 54 million people were receiving benefits at a rate exceeding \$58 billion each month (\$701 billion annually). According to the latest Social Security Trustees Report, these cash benefits made up 4.8 percent of the nation's gross domestic product. During the same year, approximately 157 million employees and self-employed workers, along with employers, contributed \$639 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. In 2009, Social Security paid benefits to 88 percent of married couples and 86 percent of nonmarried persons aged 65 or older. It is the major source of income (providing at least 50 percent of total income) for 54 percent of married couples and 73 percent of nonmarried persons aged 65 or older. It contributes 90 percent or more of income for 22 percent of married couples and 43 percent of nonmarried persons aged 65 or older. (Total income excludes withdrawals from savings and nonannuitized IRAs or 401(k) plans; it also excludes in-kind support, such as food stamps and housing and energy assistance.)

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-Employment 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—\$106,800 in 2011. There is no upper limit on taxable earnings for Medicare Hospital Insurance. Employees whose earnings exceed the maximum taxable amount because they worked for more than one employer can receive refunds of excess FICA payments when they file their tax returns.

Taxes are allocated to three trust funds: the Old-Age (retirement) and Survivors Insurance (OASI), the Disability Insurance (DI), and the Medicare Hospital Insurance (HI) Trust Funds. In addition to the taxes on FICA- and SECA-covered earnings, OASI and DI trust fund revenues include interest on trust fund securities, income from taxation of OASI and DI benefits, certain technical transfers, and gifts or bequests. By law, the OASI and DI trust funds may only be disbursed for

- monthly benefits for workers and their families,
- vocational rehabilitation services for disabled beneficiaries,
- administrative costs (currently less than 1 percent of expenditures), and
- the lump-sum death payment to eligible survivors.

Revenue received from FICA and SECA payments is transferred to the U.S. Treasury. Revenue in excess of outlays is used to purchase special interest-bearing Treasury bonds. These securities remain assets of the trust funds until needed to cover Social Security costs.

Structure and Organization

The OASDI program is administered by the Social Security Administration (SSA), which became an independent agency in 1995. The commissioner of Social Security serves a 6-year term following appointment by the president and confirmation by the Senate. A bipartisan Social Security Advisory Board serves to review existing laws and policies, commission studies, and issue recommendations intended to anticipate changing circumstances. The president appoints three of the seven board members, and Congress appoints the other four members.

The Social Security Administration's organization is centrally managed, with a nationwide network of over 1,500 offices, which includes Field Offices, Regional Offices, Teleservice (800-Number) Centers, Processing Centers, Hearings Offices, and State Disability Determination Services. The organizational structure is designed to provide timely, accurate, and responsive service to the public. By integrating support services for all programs, the Agency enhances efficiency, avoids duplication of effort, and increases opportunities to provide one-stop service to the public.

The Social Security Administration is headquartered in Baltimore, Maryland. Major headquarter components include the National Computer Center, which contains the mainframe computers that drive SSA systems; much

of the executive staff for policy, programs, operations, and systems; and field support components.

SSA's field structure is divided into 10 geographic regions containing about 1,300 field offices in communities throughout the country. Field offices are the primary setting for personal contact with the public. Office sizes range from large urban offices with 50 or more employees to remote resident stations staffed by one or two individuals. Each region is headed by a regional commissioner and staffed with specialists to handle regional administrative tasks and to assist field offices with operational issues. In addition, there are teleservice centers providing national toll-free service (1-800-772-1213). Although physically located within the various regions, each teleservice center manages the public's Social Security business from throughout the nation using state-of-the-art communications systems.

Eight processing centers handle a variety of workloads involving disability cases, international claimants, earnings records, and ongoing eligibility for Supplemental Security Income payments, as well as providing service and support for the field offices and answering calls to the toll-free number. The Hearings Offices and Appeals Council make decisions on appeals of Social Security determinations in claims for benefits.

Tables 2.F1–2.F11 provide SSA administrative data on the agency's national offices and workforce (**Tables 2.F1–2.F3**), claims workloads (**Tables 2.F4–2.F6**), delivery of services (**Table 2.F7**), and hearings and appeals operations (**Tables 2.F8–2.F11**).

Program Changes

Program changes occur through legislation or (in areas where authority is delegated to the commissioner) through regulation. Changes are often implemented in phases and may entail recurring annual changes beyond the initial enactment date or year of first implementation.

Coverage and Financing

In 2011, about 158 million people will work in employment or self-employment that is covered under the OASDI program. In recent years, coverage has become nearly universal for work performed in the United States, including American Samoa, Guam, the Northern Mariana Islands, Puerto Rico, and the U.S. Virgin Islands. Approximately 94 percent of the U.S. workforce is covered by OASDI. Workers excluded from coverage fall into five major categories:

1. Civilian federal employees hired before January 1, 1984;

2. Railroad workers (who are covered under the railroad retirement system, which is coordinated with Social Security);
3. Certain employees of state and local governments who are covered under their employers' retirement systems;
4. Domestic workers and farm workers whose earnings do not meet certain minimum requirements (workers in industry and commerce are covered regardless of the amount of earnings); and
5. Persons with very low net earnings from self-employment, generally under \$400 annually.

Table 2.A1 outlines the history of coverage provisions and **Table 2.A2** provides a history of provisions regarding noncontributory wage credits, mostly for military service.

For most employees, taxes are withheld from wages beginning with the first dollar earned. The exceptions are domestic employees, election workers, and agricultural workers. In 2011, a domestic employee must earn \$1,700 from any single employer in a calendar year before FICA is withheld. Most election workers must earn \$1,500 in 2011 before FICA is withheld. Most agricultural workers' wages are covered if the employer pays more than \$2,500 in total wages in a year or if the individual worker earns over \$150 in a year from a single employer.

Employees, their employers, and the self-employed pay taxes on earnings in covered employment up to an annual maximum taxable amount for OASDI. There is no upper limit on taxable earnings for Medicare Hospital Insurance (HI). The OASDI maximum taxable amount—\$106,800 in 2011—is updated automatically each year in relation to increases in the national average annual wage. The current FICA tax rate applicable to employees is 4.2 percent for OASDI (3.59 percent for OASI and 0.61 percent for DI) and 1.45 percent for HI. The current FICA tax rate applicable to employers is 6.2 percent for OASDI (5.3 percent for OASI and 0.9 percent for DI) and 1.45 percent for HI. Those who are self-employed pay the combined employee-employer rate of 10.4 percent for OASDI and 2.9 percent for HI under SECA.

See **Table 2.A3** for annual amounts of maximum taxable earnings and contribution rates. **Table 2.A4** shows historical annual maximum amounts of contributions by employees and self-employed individuals.

Two deduction provisions reduce the SECA and income tax liability of self-employed persons. The intent of these provisions is to treat the self-employed in much

the same manner as employees and employers are treated for purposes of FICA and income taxes. The first provision allows a deduction from net earnings from self-employment equal to the amount of net earnings before the deduction multiplied by one-half the SECA tax rate. The effect of this deduction is intended to be analogous to the treatment of the FICA tax paid by the employer, which is disregarded as remuneration to the employee for FICA and income tax purposes. The second provision allows an income tax deduction equal to one-half of the amount of the SECA tax paid, which is designed to reflect the income tax deductibility of the employer's share of the FICA tax.

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

Insured Status

Workers attain insured status upon earning the minimum number of credits needed to become eligible for Social Security benefits. Insured status is also required to establish benefit eligibility for the worker's family members or survivors. The requirements for insured status differ depending on the type of benefit involved.

To determine a worker's insured status, Social Security looks at the amount of the worker's earnings (employment or self-employment) covered under Social Security and assigns "credits" for those earnings. These credits are called quarters of coverage. In 2011, one quarter of coverage (QC) is credited for each \$1,120 in annual covered earnings, up to a maximum of four QCs for the year. Earnings of \$4,480 or more in 2011 will give the worker the maximum four QCs for the year regardless of when the money is actually paid during the year. The amount of earnings required for a QC is adjusted automatically each year in proportion to increases in the average wage level.

Fully Insured

Eligibility for most types of benefits requires that the worker be fully insured. To be fully insured, a worker must have a number of QCs at least equal to the number of calendar years elapsing between the year in which the worker is age 21 (or 1950, if later) and the year in which he or she reaches age 62, becomes disabled, or dies—whichever occurs first. To compute "elapsed" years, Social Security does not count the year in which

the worker attains age 21 (or 1950, if later) or the year in which the worker attains age 62, becomes disabled, or dies. If the resulting number of elapsed years is less than 6, the number is raised to 6. All workers need at least 6 QCs to be insured. Workers who reach age 62 in 1991 or later need 40 QCs to be fully insured. Special rules may apply if the worker had a prior period of disability. For workers who become disabled or die before age 62, the number of QCs needed for fully insured status depends on their age at the time of disability or death.

Currently Insured

Generally, if a worker dies before meeting fully insured status, benefits can still be paid to certain survivors if the worker was "currently insured" at the time of death. Survivors benefits are potentially payable to a worker's children and to a widow(er) who takes care of the deceased's child who is under age 16 or disabled and receiving Social Security benefits. To be currently insured, the worker must have earned 6 QCs in the 13 quarters ending with the quarter of death.

Additional Insured Status Requirements for Noncitizens

The Social Security Protection Act of 2004 (Public Law 108-203) was signed into law on March 2, 2004. Section 211 of this law imposed additional requirements for determining fully and currently insured status. These additional requirements affect noncitizen workers to whom Social Security did not assign a Social Security number (SSN) before January 1, 2004. A noncitizen worker must meet one of two additional requirements under section 211 in order for anyone to qualify for an OASDI benefit based on the earnings record of the noncitizen worker. These benefits include retirement or disability insurance benefits, dependents or survivors insurance benefits, the lump-sum death payment, and Medicare based on end-stage renal disease.

For purposes of the above paragraph:

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

If a noncitizen worker who was not assigned an SSN before January 1, 2004, does not meet one of these additional requirements, then he or she cannot be fully or currently insured. No one would qualify for OASDI benefits based on the noncitizen worker's earnings. This is true even if the noncitizen worker appears to have the

required number of quarters of coverage (QCs) in accordance with the regular insured status provisions.

Disability Insured

To qualify for disability benefits, a nonblind worker must have recent work activity in addition to being fully insured. Under the requirement involving recent work, a nonblind worker who is age 31 or older must have earned at least 20 QCs during the 40-calendar-quarter period ending with the quarter in which the disability began. In general, workers disabled at ages 24 through 30 must have earned QCs in one-half of the calendar quarters beginning with the quarter after the quarter in which age 21 is attained and ending with the calendar quarter in which the disability began. In this case, the quarters counted will go back before the quarter in which the worker turned age 21. Workers under age 24 need 6 QCs in the 12-quarter period ending with the quarter in which the disability began. Workers who qualify for benefits based on blindness need only be fully insured. Special rules may apply if the worker had a prior period of disability.

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

International Agreements

The president is authorized to enter into international Social Security agreements (also called *totalization agreements*) to coordinate the U.S. Old-Age, Survivors, and Disability Insurance (OASDI) program with comparable programs of other countries. The United States currently has Social Security agreements in effect with 24 countries.

Social Security agreements and supplementary agreements, by effective dates

Australia	2002	Italy	1978, 1986
Austria	1991, 1997	Japan	2005
Belgium	1984	Korea (South)	2001
Canada	1984, 1997	Luxembourg	1993
Chile	2001	Netherlands	1990, 2003
Czech Republic	2009	Norway	1984, 2003
Denmark	2008	Poland	2009
Finland	1992	Portugal	1989
France	1988	Spain	1988
Germany	1979, 1988, 1996	Sweden	1987, 2007
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 on the basis of totalized credits.

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

Benefit Computation and Automatic Adjustment Provisions

PIA Computation

The primary insurance amount (PIA) is the monthly benefit amount payable to the worker upon initial entitlement at full retirement age (FRA) or upon entitlement to unreduced disability benefits. (FRA is the age at which unreduced retirement benefits may be paid.) The PIA is also the base figure from which monthly benefit amounts are determined for early retirement, delayed retirement, and for the worker's family members or survivors. The PIA is derived from the worker's annual taxable earnings from covered wages and self-employment, averaged over a period that encompasses most of the worker's adult years. Until the late 1970s, the average monthly wage (AMW) was the earnings measure generally used. For workers first eligible for benefits after 1978, average indexed monthly earnings (AIME) have replaced the AMW as the usually applicable earnings measure. The PIA computation based on AIME currently involves the following three steps:

1. Indexing of earnings. The worker's annual taxable earnings after 1950 are updated, or indexed, to reflect the general earnings level in the indexing year—the second calendar year before the year in which the worker is first eligible; that is, first reaches age 62, becomes disabled, or dies. Earnings in years after the indexing year are not indexed; they are

counted at their actual value. A worker's earnings for a given year are indexed by multiplying them by the following ratio (indexing factor): the average wage in the national economy for the indexing year, divided by the corresponding average wage figure for the year to be indexed.

Table 2.A8 shows the indexing factors applicable to the earnings of workers who were first eligible from 1996 through 2011. **Table 2.A9** shows indexed earnings for workers first eligible from 2004 through 2011 who had maximum taxable earnings in each year after 1950. For a detailed description of an AIME computation, see Appendix D, "Computing a Retired-Worker Benefit."

2. Determining AIME. The number of years used in the computation is determined by subtracting the number of dropout years from the number of elapsed years. Elapsed years are the full calendar years between age 21 (or 1950, if later) and the year of first eligibility. Years within an established period of disability may be excluded from elapsed years. Years with the lowest earnings are dropped out of the computation. There are 5 dropout years for retirement and survivor computations and for many disability insurance benefit computations; workers disabled before age 47 have 0 to 4 dropout years (one-fifth the number of elapsed years). If the resulting number of computation years is less than 2, the number is automatically raised to 2. The number of years required for computing retirement benefits is 35 for workers who were born after 1928, unless it is lowered by an established period of disability.

The actual years used in the computation (the *computation years*) are the years of highest indexed earnings after 1950, including any years before age 22 or after age 61 as well as the year of disability or death. AIME is calculated as the sum of indexed earnings in the computation period, divided by the number of months in that period.

Table 2.A10 provides a historical outline of provisions related to AIME and AMW and describes variations in the number of dropout years. **Table 2.A16** describes AMW benefit computations based on the worker's nonindexed earnings after 1950. (Very few people currently being awarded benefits have PIAs computed under the AMW computation method. The method shown in Table 2.A16 is more frequently applicable in earnings recomputations for workers who reached age 62 before 1979.)

3. Computing the PIA. The formula used to compute the PIA from AIME is weighted to provide a higher PIA-to-AIME ratio for workers with comparatively low earnings. The formula applies declining percentage conversion rates to three AIME brackets. For workers who reach age 62, become disabled, or die in 2011, the formula provides a PIA equal to the sum of

90 percent of the first \$749 of AIME, plus

32 percent of the next \$3,768 of AIME, plus

15 percent of AIME over \$4,517.

The PIA is increased by cost-of-living adjustments (COLAs) beginning with the first year of eligibility. The COLA for 2011 took effect in December 2010.

Table 2.A11 shows the PIA formula and first applicable COLA for workers first eligible in 1979 or later.

The dollar amounts defining the AIME brackets are referred to as *bend points*. These bend points (as described in Table 2.A11) are updated automatically each year in proportion to increases in the national average wage level. This automatic adjustment ensures that benefit levels for successive generations of eligible workers will keep up with rising earnings levels, thereby assuring consistent rates of earnings replacement from one generation of beneficiaries to the next.

The PIA formula applicable to a worker depends on the year of eligibility (or death) rather than on the year benefits are first received. The year of eligibility for retirement benefits is the year the worker attains age 62. For workers born in 1945, the 2007 formula is used and the PIA is increased by COLAs beginning with the one taking effect in December 2007. Subsequent recomputations of the worker's benefit, including additional earnings not originally considered, delayed retirement credits, or additional COLA increases, all refer to the basic computation that originally applied on the basis of the year of eligibility. The FRA for workers born in 1945 is 66 years.

Beginning in June 1982, benefits are rounded to the next lower 10 cents. The final benefit payment is rounded to the lower whole dollar amount (if not already an even dollar). Before June 1982, benefits were paid in 10-cent increments after rounding up to the next dime.

A cost-of-living increase in benefits generally is established each year if the Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W), prepared by the Department of Labor, indicates an increase of at least 0.1 percent (after rounding) 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 in December of the year in which the determination is made.

Under certain conditions, depending on the size of the combined OASDI trust funds relative to estimated disbursements, the applicability and size of a cost-of-living adjustment may be determined under an alternative method, called the *stabilizer provision*. In no case, however, are benefits reduced below the level of benefits in the year of determination. Historically, this provision has never been triggered.

Table 2.A18 presents a history of provisions relating to the automatic adjustment of benefits, including a description of the stabilizer provision. In addition, the table includes a summary history and description of provisions relating to the annual automatic adjustment of (1) the maximum amount of taxable and creditable earnings, (2) the dollar amount needed to establish a quarter of coverage, (3) the bend points defining the AIME brackets in the PIA formula and the PIA brackets in the maximum family benefit formula, and (4) the exempt amounts under the earnings (retirement) test. All of these adjustments are linked to increases in the level of the national average annual wage, rather than to increases in the CPI. **Table 2.A19** illustrates the cumulative effect of statutory and automatic increases in benefits for workers who have been in benefit status over varying time periods.

Alternative PIA Computation Provisions

Special minimum PIA. Workers with low earnings but steady attachment to the workforce over most of their adult years may qualify for monthly benefits based on the special minimum PIA computation. This computation does not depend on the worker's average earnings but on the number of coverage years—years in which the worker had earnings equal to or above a specified amount. The level of the special minimum PIA is the same for workers having the same number of coverage years, regardless of age or year of first eligibility. Increases in the special minimum PIA are linked to cost-of-living adjustments.

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

Windfall Elimination Provision (WEP). The WEP affects workers who receive Social Security benefits based on their own work and are also entitled to a pension based on noncovered work after 1956. First eligibility for the noncovered pension and for Social Security benefits must be after December 31, 1985, for WEP to apply. WEP reduces the Social Security PIA upon which OASDI benefits are based and affects all benefits paid on that record except those for survivors. The WEP reduction ceases when entitlement to the pension payment ends, the wage earner dies, or the wage earner earns a total of 30 years of substantial Social Security earnings. The WEP reduction amount is limited to no more than one-half the amount of the noncovered pension.

A WEP PIA is generally based on 40 percent of the first bend point instead of 90 percent used for the regular AIME PIA. The maximum amount of the reduction is half the amount of the first bend point for the applicable eligibility year. The maximum reduction for WEP for the 2011 eligibility year is \$374.50 (not to exceed one-half of the pension from noncovered employment). SSA's retirement planner at <http://www.socialsecurity.gov/retire2/index.htm> has a benefit calculator that includes WEP calculations.

Example: A retired worker with a noncovered pension of \$2,000 a month and fewer than 21 years of covered employment attains age 62 in 2011.

Regular PIA, based on AIME of \$1,000.

$$\$749 \times .90 = \$674.10$$

$$\$251 \times .32 = \$80.32$$

$$\text{PIA} = \$754.42 \text{ rounded to } \$754.40$$

WEP PIA, based on AIME of \$1,000.

$$\$749 \times .40 = \$299.60$$

$$\$251 \times .32 = \$80.32$$

$$\text{PIA} = \$379.92 \text{ rounded to } \$379.90$$

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 non-WEP percentage of the first bend point).

Examples of pensions subject to WEP are U.S. Civil Service Retirement System annuities, retirement benefits based on foreign earnings, and state and local government pensions based on noncovered earnings.

Table 2.A11.1 provides more detail about the WEP computation and contains the amounts of substantial earnings for years after 1990. Substantial earnings for earlier years are listed in **Table 2.A12**.

Family maximum provisions. Monthly benefits payable to the worker and family members or to the worker's survivors are subject to a maximum family benefit amount. The family maximum level for retired-worker families or survivor families usually ranges from 150 percent to 188 percent of the worker's PIA. The maximum benefit for disabled-worker families is the smaller of (1) 85 percent of AIME (or 100 percent of the PIA, if larger) or (2) 150 percent of the PIA.

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

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

Benefit Types and Levels

Retired and Disabled Workers

The full retirement age (FRA) is the earliest age at which an unreduced retirement benefit is payable (sometimes referred to as the *normal retirement age*). The age for full retirement benefits is scheduled to rise gradually from age 65 to age 67; the first incremental increase affected workers who reached age 62 in 2000. For workers who reach age 62 in 2005 through 2016, FRA is age 66.

Reduced retirement benefits are available as early as age 62. The monthly rate of reduction from the full retirement benefit (that is, the PIA) is 5/9 of 1 percent a month for the first 36 months immediately preceding FRA. The reduction rate is 5/12 of 1 percent a month for any additional months. The maximum overall reduction for early retirement will rise from 20 percent to 30 percent for those workers who reach age 62 in 2022 and later, when age 67 becomes the FRA. For workers who reach age 62 in 2005 through 2016, the maximum reduction is 25 percent.

Table 2.A17.1 shows the FRA and maximum reduction of retired-worker benefits by year of birth.

If a disabled worker receives a reduced retirement benefit for months before disability entitlement, the disability benefit is reduced by the number of months for which he or she received the reduced benefit.

For insured workers who postpone their retirement beyond FRA, benefits are increased for each month of nonpayment beyond that FRA up to age 70. This increase is called a *delayed retirement credit* and is potentially available for any or all months following attainment of FRA (maximum of 60 months for workers who attained age 65 before 2003). The total credit possible per year for delayed retirement credits is 8 percent for workers who reach age 62 in 2005 or later.

Table 2.A20 shows a history of benefit increases due to delayed retirement.

Spouses and Children of Workers

Spouses receive 50 percent of the worker's PIA (regardless of the worker's actual benefit amount), if the spouse has attained FRA at entitlement to spousal benefits. The spouse of a retired or disabled worker can elect monthly benefits as early as age 62. These benefits are reduced at the rate of 25/36 of 1 percent a month for the first 36 months immediately preceding FRA and 5/12 of 1 percent for each additional month. The maximum overall reduction for early retirement will rise from 25 percent to 35 percent by 2022, when age 67 becomes the FRA for spouses attaining age 62 in that year.

Children of retired or disabled workers are also eligible to receive monthly benefits. The term *child* refers to an unmarried child under age 18, a child aged 18 to 19 attending elementary or secondary school full time, or an adult child aged 18 or older who was disabled before age 22. In addition, young spouses (that is, those under age 62) who care for a worker's entitled child may also be eligible. For purposes of defining young spouses' benefits, the term *child* refers to an entitled child under age 16 or to a child of the worker aged 16 or older and disabled before age 22. Children of retired or disabled workers can receive up to 50 percent of the worker's PIA, as can young spouses. (The benefit of a young spouse is not reduced for age.) Monthly benefits payable to the spouse and children of a retired or disabled worker are limited to a family maximum amount, as discussed earlier.

Benefits are payable to unmarried divorced spouses of retirement age who were married at least 10 years to the worker. A divorced spouse benefit is excluded from

family maximum provisions. Divorced spouses aged 62 or older and divorced for 2 or more years (after marriage of 10 or more years) may be independently entitled on the record of the ex-spouse who is not yet entitled to benefits, if the ex-spouse could be entitled to retirement benefits if he or she applied.

Survivors Benefits

Widows and widowers of fully insured workers are eligible for unreduced benefits at FRA. As with retired workers and spouses, widow(er)s' FRA will gradually increase to age 67, but on a different schedule. Widows and widowers can elect reduced monthly benefits at age 60 or, if disabled, as early as age 50. Surviving divorced spouses can also receive benefits if married to the worker for at least 10 years and not remarried before age 60 (age 50 if disabled).

For survivors whose full benefit retirement age is 65, the monthly rate of reduction for the first 60 months immediately preceding FRA is 19/40 of 1 percent of the worker's PIA, with a maximum reduction of 28.5 percent at age 60. For survivors whose FRA is after 65, the amount of reduction for each month prior to FRA is adjusted accordingly to ensure that the maximum reduction at age 60 remains 28.5 percent of the worker's PIA.

Benefits for widows and widowers are increased if the deceased worker delayed receiving retirement benefits beyond the FRA. In these cases, the survivor benefits include any delayed retirement credits the deceased worker earned. Conversely, if the worker had elected early retirement, widow(er)s' benefits are limited for widow(er)s first entitled to survivors benefits at age 62 or later. For these beneficiaries, the benefit is the higher of 82.5 percent of the worker's PIA or the amount the worker would be receiving if still alive. Disabled widow(er)s aged 50 to 60 receive the rate of reduction set for widow(er)s aged 60 (71.5 percent of PIA) regardless of their age at the time of entitlement.

Children of deceased workers and mother and father beneficiaries under FRA are eligible to receive monthly benefits up to 75 percent of the worker's PIA if the worker dies either fully or currently insured. Mother and father beneficiaries must be caring for the worker's entitled child who is either under age 16 or disabled. A dependent parent aged 62 or older is eligible for monthly benefits equal to 82.5 percent of the worker's PIA. When two dependent parents qualify for benefits, the monthly benefit for each is equal to 75 percent of the deceased worker's PIA. Monthly benefits payable to survivors are reduced to conform to the family maximum payable on the deceased worker's account. Benefits for a surviving divorced spouse, however, do not affect the maximum benefit to the family.

See **Table 2.A20** for more information on the increases in the full (or normal) retirement age for workers. **Table 2.A21** describes age-related reductions for dependent beneficiaries, as does **Table 2.A22** for widow(er)s. Additionally, **Tables 2.A23** and **2.A24** show the history of legislation relating to special monthly benefits payable to certain persons born before January 2, 1900. **Table 2.A25** summarizes the history of certain OASDI benefits other than monthly benefit payments. **Table 2.A26** presents illustrative monthly benefit amounts for selected beneficiary families, based on hypothetical earnings histories representing five different earnings levels. **Table 2.A27** shows minimum and maximum monthly benefits payable to retired workers retiring at age 62 in various years beginning with 1957 (the first full year benefits became available at age 62). **Table 2.A28** shows minimum and maximum monthly benefits payable to retired workers retiring at age 65 in various years beginning with 1940.

Provisions for Railroad Retirement Board Beneficiaries

The OASDI tables do not include a number of persons receiving Railroad Retirement benefits who would be eligible for Social Security benefits had they applied. The reason they have not applied is that receipt of a Social Security benefit would reduce their Railroad Retirement benefit by a like amount.

The Railroad Retirement Act of 1974, effective January 1, 1975, provided that the regular annuity for employees with 10 or more years of railroad service who retired after December 31, 1974, would consist of two components.

- Tier 1. A basic Social Security 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.

Public Law 107-90 (the 2001 amendments to the Railroad Retirement Act of 1974), effective January 1, 2002, revised the railroad service work requirement. The railroad service work requirement is 10 or more years of railroad service or, effective January 1, 2002, at least 5 years of railroad service after December 31, 1995. The two components are unchanged.

Effect of Current Earnings on Benefits

Annual Earnings Test

Individuals may receive Social Security retirement, dependent, or survivor benefits and work at the same time. However, under the law, those benefits could be reduced if earnings exceed certain amounts.

Under the annual earnings test provisions of the Social Security Act, beneficiaries who are younger than full retirement age and have earnings in excess of certain exempt amounts may have all or part of their benefits withheld. The annual earnings test exempt amount for nondisabled beneficiaries is pegged to increases in the average wage. Different rules on earnings apply to beneficiaries who receive disability benefits, and are described in a subsequent section.

For beneficiaries who are younger than FRA throughout the year:

- The earnings test exempt amount is \$14,160 in 2011.
- Benefits are withheld at the rate of \$1 for each \$2 of earnings above the exempt amount.

For beneficiaries who attain FRA in 2011, the annual earnings test is significantly higher.

- This earnings test exempt amount is \$37,680 in 2011. Only earnings before the month of attainment of FRA are counted for purposes of this portion of the annual earnings test.
- Benefits are withheld at the rate of \$1 for every \$3 of earnings above the exempt amount.

Individuals have the option to receive benefits under a monthly earnings test if it is to their advantage to do so. This option is usually exercised in the first year of entitlement, because the monthly test permits payment for some months even if the annual earnings limit is greatly exceeded. Under the monthly test, beneficiaries receive a full monthly benefit for months in which they do not earn an amount equal to more than 1/12 the annual earnings test. The monthly earnings test is applied to the self-employed on the basis of the number of hours worked instead of monthly earnings. Generally, beneficiaries are eligible for the monthly earnings test in only one year.

A foreign work test applies to work outside the United States in employment or self-employment that is not subject to U.S. Social Security taxes. Benefits are withheld for each month a beneficiary younger than FRA works more than 45 hours.

The earnings test no longer applies beginning with the month a beneficiary attains FRA. Elimination of the

earnings test at FRA is effective for taxable years ending after December 31, 1999 (Public Law 106-182). At FRA no benefits are withheld for earnings, regardless of the amount of earnings.

Tables 2.A29 and 2.A29.1 provide historical detail on the retirement test.

Automatic Adjustments for Additional Earnings

When a worker has earnings after filing for Social Security benefits, the additional earnings are credited to the worker's record. The reduction factor and the computation of the PIA could be affected by the additional earnings. These adjustments occur automatically; the worker does not need to request the action.

Adjusted Reduction Factor. The reduction factor is based on all months of entitlement prior to FRA. If a full month or partial month of benefits is withheld because of the earnings test, the reduction factor is automatically adjusted at FRA. For widows and widowers, the automatic adjustments are effective at age 62 and at FRA. This adjustment of the reduction factor results in a higher ongoing monthly benefit. For example, if retirement benefits are claimed 36 months before FRA, a 36-month reduction factor is applied to the PIA. If the earnings test results in no payment of benefits for 6 of those months, the reduction factor is automatically adjusted at FRA, the ongoing reduction factor is changed to 30 months, and benefits are increased retroactively to the month of FRA.

Recomputation. Additional earnings also have the potential to increase the PIA. A recomputation is automatically considered each year when earnings of the insured worker are credited to the record. A recomputation of the PIA is processed if the earnings result in an increase to the PIA of at least \$1.00. The increase is retroactive to January of the year following the year of new earnings. For example, if a beneficiary's PIA is \$955.50 effective December 2010 and the beneficiary had earnings in 2010, a recomputation would be considered for January 2011. After considering all earnings through 2010, if it is found that the PIA has increased to \$976.50 as of January 2011, the recomputation can be allowed because the increase is at least \$1.00 over the December 2010 PIA.

Earnings and Disability Benefits

Beneficiaries entitled on the basis of their own disability—disabled workers, disabled adult children, and disabled widow(er)s—are not subject to the annual earnings test. Substantial earnings by disabled beneficiaries, however, may indicate that they are able to do work that constitutes substantial gainful activity (SGA) and therefore no longer meet the requirements for disability

benefits. Although other factors are considered, numerical earnings thresholds are used to evaluate SGA. Disabled beneficiaries must report all earnings to SSA for timely evaluation of SGA.

Through 2000, SSA periodically changed the earnings amount for which a nonblind disabled individual was considered to be engaged in SGA. Effective January 1, 2001, SGA amounts are automatically adjusted annually on the basis of increases in the national average wage index. The SGA amount for nonblind individuals in calendar year 2011 is \$1,000 per month.

A different definition of SGA applies to blind individuals receiving Social Security disability benefits. Increases in the SGA amount for blind individuals have been pegged to increases in the national average wage index since 1978. The SGA level for blind individuals in calendar year 2011 is \$1,640 per month.

A 9-month trial work period allows beneficiaries who are still disabled to test their ability to work. During that period, beneficiaries may earn any amount and still receive full benefits. After the individual completes 9 trial work months, the SGA level is used to determine whether earnings are substantial.

Table 2.A30 provides related historical data on disability program earnings guidelines.

Government Pension Offset

A pension from a federal, state, or local government based on work that was not covered by Social Security could reduce the amount of a spouse's or widow's or widower's Social Security benefits. Social Security benefits are reduced (offset) by two-thirds of the government pension if the pension is based on noncovered work by the spouse, widow, or widower. For example, for a monthly civil service pension of \$600, two-thirds, or \$400, would offset a Social Security spousal benefit. An individual eligible for a Social Security spousal benefit of \$500 would receive \$100 per month from Social Security ($\$500 - \$400 = \$100$). The intent of the Government Pension Offset provision is to ensure that, when determining the amount of spousal benefits, government employees who do not pay Social Security taxes are treated in a manner similar to those who work in the private sector and pay Social Security taxes. The law requires that Social Security spousal benefits be offset dollar for dollar by the amount of a spouse's own Social Security retirement benefit. For example, if a woman worked and earned her own \$600 monthly Social Security retired-worker benefit but was also eligible for a \$500 spouse's benefit on her husband's Social Security

record, the spousal benefit would not be paid because it would be offset by her own Social Security benefit.

Exceptions to the Government Pension Offset could apply if some of the work on which the pension is based was in covered employment. Specific rules apply depending on the employer and on the dates of employment. There are also exemptions for those who were eligible for the government pension before December 1982 or before July 1983, if specific criteria are met.

Taxation of Benefits

Up to 85 percent of Social Security benefits may be subject to federal income tax depending on the beneficiary's income, marital status, and filing status. The definition of income for this provision is as follows: adjusted gross income (before Social Security or Railroad Retirement benefits are considered), plus tax-exempt interest income, with further modification of adjusted gross income in some cases involving certain tax provisions of limited applicability among the beneficiary population, plus half the Social Security and Tier 1 Railroad Retirement benefits.

For married beneficiaries filing jointly with adjusted gross income (as defined above) that is \$32,000 a year or less, no Social Security benefits are subject to taxation. If their adjusted gross income exceeds \$32,000 but is \$44,000 or less, up to 50 percent of the Social Security benefit is subject to income tax. If their income exceeds \$44,000, up to 85 percent of the Social Security benefit is subject to income tax. For married beneficiaries filing separately who lived together any time during the tax year, there is no minimum threshold. Up to 85 percent of the Social Security benefit is subject to income tax.

For individuals in all other filing categories (single, head of household, qualifying widow(er), and married filing separately but who lived apart from their spouse for the entire year), the income threshold is \$25,000. Generally, up to 50 percent of benefits are taxable for income between \$25,001 and \$34,000, and up to 85 percent of benefits are taxable for income exceeding \$34,000.

Like all matters dealing with tax liability, taxation of Social Security benefits falls under the jurisdiction of the Internal Revenue Service.

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

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Supplemental Security Income

Program Overview

The Supplemental Security Income (SSI) program provides income support to persons aged 65 or older, blind or disabled adults, and blind or disabled children. Eligibility requirements and federal payment standards are nationally uniform. The 2011 federal SSI benefit rate for an individual living in his or her own household and with no other countable income is \$674 monthly; for a couple (with both husband and wife eligible), the SSI benefit rate is \$1,011 monthly.

Payments under SSI began in January 1974. SSI 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 in monthly OASDI benefits or other earned or unearned income is not counted. Also excluded is \$65 of monthly 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 \$494 in federal SSI payments

$$\$674 - (\$200 - \$20) = (\$674 - \$180) = \$494.$$

A person whose income consists of \$500 in gross monthly earnings would receive \$466.50 in federal SSI payments

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

$$\text{FBR } \$674 - \$207.50 = \$466.50 \text{ federal SSI}$$

Individuals generally are not eligible for SSI if they have resources in excess of \$2,000 (or \$3,000 for a couple). Certain resources are excluded, most commonly a home, an automobile, and household goods and personal effects. States have the option to supplement the federal SSI payment for all or selected categories of persons, regardless of previous state program eligibility.

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 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 (SGA) 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 SGA 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.¹ 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.²

2006 (Public Law 109-171, enacted February 8). Requires the Commissioner to conduct reviews of a

specific percentage of SSI initial disability and blindness cases involving individuals aged 18 or older that are allowed by State Disability Determination Service (DDS) agencies. The provision is phased in as follows—for fiscal year 2006, the Commissioner is required to review 20 percent of DDS allowances; in fiscal year 2007, the requirement is 40 percent; and, for fiscal years 2008 and thereafter, 50 percent of all DDS allowances are required to be reviewed. These reviews are to be made before the allowance decision is implemented.

Other Eligibility Provisions

Citizenship and Residency

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.

1. In 2009, SSA entered into a nationwide class action settlement that limits the felony crime offense codes upon which fugitive felon nonpayments may be based under this statute. In 2010, the agency stopped parole and probation violator nonpayments for residents of New York, Connecticut, and Vermont pursuant to a Second Circuit Court of Appeals decision in a pending proposed nationwide class action suit.

2. 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.

1996 (Public Law 104-193, enacted August 22). Prohibits SSI eligibility for anyone who is not a U.S. citizen or national. Aliens are not eligible unless they meet the definition of “qualified alien” and the criteria for certain exception categories, such as lawful permanent residents who earn or can be credited with 40 qualifying quarters of earnings, certain refugee categories that may be granted time-limited eligibility, or active-duty U.S. military or veterans and their spouses and children. For aliens ineligible under the new standards who were receiving SSI as of August 22, 1996, extends eligibility 1 year from enactment.

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

2007 (Public Law 110-161, enacted December 26). Provides certain Iraqi and Afghan aliens with special immigrant status, as described in section 101(a)(27) of the Immigration and Nationality Act. As special immigrants, these Iraqi and Afghan aliens are eligible for resettlement assistance, entitlement programs, and other benefits available to refugees admitted under section 207 of such Act (admission of refugees in emergency situations) for a period not to exceed 6 months.

2008 (Public Law 110-181, enacted January 28). Provides certain Iraqi aliens who have provided service to the United States with special immigrant status, as described in section 101(a)(27) of the Immigration and Nationality Act. As special immigrants, these Iraqis are eligible for resettlement assistance, entitlement programs, and other benefits available to refugees admitted under section 207 of such Act (admission of refugees in emergency situations) for a period not to exceed 8 months.

(Public Law 110-328, enacted September 30). Extends the 7-year SSI eligibility period for certain refugees, asylees, and other humanitarian immigrants (including victims of human trafficking) to 9 years for the period October 1, 2008 through September 30, 2011. For those with naturalization applications pending or awaiting the swearing-in ceremony, the eligibility period is extended through September 30, 2011. Also applies to the noncitizens whose SSI had previously ceased due to the expiration of the 7-year period. For these noncitizens, SSI benefits will be paid for months in the period October 1, 2008 through September 30, 2011, for the duration of the noncitizen’s reestablished eligibility.

2009 (Public Law 111-118, enacted December 19). Eliminates the 8-month time limit on SSI eligibility for certain Iraqi and Afghan refugees who have provided service to the United States. The time-limited eligibility for these individuals is now the same period applicable to other humanitarian refugees.

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 toward the 36-month limit.

Payments based on DA&A must be made to a representative payee. Preference is required to be given to community based nonprofit social service agencies and federal, state, or local government agencies in representative payee selection. These agencies when serving as payees for individuals receiving payments based on DA&A may retain the lesser of 10 percent of the monthly benefit or \$50

(adjusted annually after 1995 by the Consumer Price Index [CPI]) as compensation for their services.

Establishment of one or more referral and monitoring agencies for each state is required.

1996 (Public Law 104-121, enacted March 29). An individual is not considered disabled if DA&A is a contributing factor material to a finding of disability.

Applies DA&A representative payee requirements enacted under Public Law 103-296 to disabled SSI recipients who have a DA&A condition and are incapable of managing their benefits. In addition, these recipients shall be referred to the appropriate state agency administering the state plan for substance abuse treatment.

Institutionalization

1972 (Public Law 92-603, enacted October 30). An individual who is an inmate of a public institution is ineligible for SSI payments unless the institution is a facility approved for Medicaid payments and is receiving such payments on behalf of the person. Under *regulations*, the Medicaid payment must represent more than 50 percent of the cost of services provided by the facility to the individual.

1976 (Public Law 94-566, enacted October 20). An inmate of a publicly operated community residence serving no more than 16 persons may, if otherwise eligible, receive SSI.

1983 (Public Law 98-21, enacted April 20). Payments may be made to persons who are residents of public emergency shelters for the homeless for a period of up to 3 months in any 12-month period.

1986 (Public Law 99-643, enacted November 10). Effective July 1, 1987, disabled or blind recipients who were receiving special SSI payments or had special SSI recipient status under section 1619 in the month preceding the first full month of institutionalization, may receive payments based on the full federal benefit rate for the initial 2 full months of institutionalization, if they reside in certain public medical, psychiatric, or Medicaid facilities or in private Medicaid facilities.

1987 (Public Law 100-203, enacted December 22). Effective January 1, 1988, payments may be made to persons who are residents of public emergency shelters for the homeless, for up to 6 months in a 9-month period.

Effective July 1, 1988, continued SSI payments for up to 3 months are 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 payments 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.

2009 (Public Law 111-115, enacted December 15). Prohibits the payment of any retroactive SSI benefits to individuals while they are in prison, are in violation of conditions of their parole or probation, or are fleeing to avoid prosecution for a felony or a crime punishable by sentence of more than 1 year. These retroactive benefits will not be paid until the beneficiary is no longer a prisoner, probation or parole violator, or fugitive felon.

Vocational Rehabilitation (VR) 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 VR 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 SGA 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 VR program to include blind SSI recipients.

1990 (Public Law 101-508, enacted November 5). Reimbursement authorized for the cost of VR 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 suspended³ (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 VR 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

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

the total that would be available if the EN chose the outcome payment system.

The four milestones are based on gross earnings exceeding the SGA 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 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 authorize SSA to make redeterminations of disabled childhood recipients who attain age 18, more than 1 year after the date such recipient attains age 18.

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

Deeming of Income and Resources

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

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

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

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

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

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

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

1996 (Public Law 104-193, enacted August 22). Deeming of income and resources from an immigration sponsor to a noncitizen continues until citizenship, with exceptions for those who earn, or can be credited with, 40 qualifying quarters of earnings. Effective for those whose sponsor signs a new legally enforceable affidavit of support.

(Public Law 104-208, enacted September 30). Amends Public Law 104-193 to add two exceptions to the sponsor-to-alien deeming:

- Provides that if the noncitizen is indigent and would be unable to obtain food and shelter without SSI benefits even after receiving support from the sponsor, then only the amount of income and resources actually provided by the sponsor will be counted for a 12-month period after a determination of indigence; and
- Provides that in certain cases, deeming would not apply for a 12-month period (with some options for extension) if the noncitizen (or his/her children) has been battered or subjected to extreme cruelty by family members.

1997 (Public Law 105-33, enacted August 5). Amends Public Law 104-208 to add an additional exception to sponsor-to-alien deeming when the parent of a noncitizen has been battered or subjected to extreme cruelty by family members.

2006 (Public Law 109-163, enacted January 6). Provides that individuals who were made ineligible for SSI because of their spouses or parents being called to active military duty would not have to file a new application for SSI benefits if they again could be eligible for benefits before the end of 24 consecutive months of ineligibility.

Federal Benefit Payments

Federal Benefit Rates

Basic benefit standards are used in computing the amount of federal SSI payments. Benefit levels differ for individuals and couples living in households and for persons in Medicaid institutions. Individuals or couples living in their own households receive the full federal benefit. If an individual or couple is living in another person's 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). Requires an offset (by reducing retroactive Social Security benefits) for persons whose initial OASDI payment is retroactive, to equalize total benefits with those if paid when regularly due.

1984 (Public Law 98-617, enacted November 8). Expands offset provision 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 are 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 in which 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.

Installment Payments

1996 (Public Law 104-193, enacted August 22). Establishes a schedule for paying retroactive SSI benefit amounts that exceed 12 times the federal benefit

rate (FBR) plus the state supplement level. Payments would be made at 6-month intervals:

- The first installment would be 12 times the FBR plus any federally administered state supplement.
- Any remaining retroactive benefits would be paid in a second installment (not to exceed the first payment amount).
- All remaining retroactive benefits would be paid in the third installment.

Provides that where an underpaid individual has incurred debts to provide for food, clothing, or shelter, has expenses for disability-related items and services that exceed the installment amount, or has entered into a contract to purchase a home, the installment payment would be increased by the amount needed to cover those debts, expenses, and obligations.

Provides that full retroactive payments be paid to an individual who is terminally ill or, if currently ineligible, is likely to remain so for the next 12 months.

2006 (Public Law 109-171, enacted February 8).

Requires that past-due monthly SSI benefits that exceed three times the maximum monthly benefit (federal benefit rate plus state supplementary payment amount, if any) payable to the individual be paid in up to three installment payments, 6 months apart. Also, limits the amount of the first two installment payments to three times the maximum monthly benefit. All remaining benefits due are to be paid in the third installment. As under current law, the amounts of the installment payments may be increased in certain cases, such as those in which the individual has outstanding debt relating to food, clothing, or shelter, or has necessary medical needs. Effective 3 months after 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 excluding 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 SGA. 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.

2005 (Public Law 109-64, enacted September 20). Amends the National Flood Insurance Act of 1968 to specify that assistance provided under a program for flood mitigation activities with respect to a property would not be considered income or a resource of the owner of the property when determining eligibility for or benefit levels under any income assistance or resource-tested program (including SSI) that is funded in whole or in part by a federal agency or by appropriated federal funds.

2006 (Public Law 109-432, enacted December 20). Extends the present law that allows combat pay to be considered for Earned Income Tax Credit (EITC) purposes for one additional year (for taxable years ending before January 1, 2008). For SSI purposes, EITC payments are excluded from income, and are not a countable resource for 9 calendar months following the month of receipt.

2008 (Public Law 110-185, enacted February 13). A rebate payment received under the Economic

Stimulus Act of 2008, and any other credit or refund under section 6428 of the Internal Revenue Code, would not be taken into account as income for purposes of SSI.

(Public Law 110-245, enacted June 17). Privatized military housing allowances withdrawn directly from a servicemember's pay by military payroll and paid to the landlord will be considered in-kind income, and the SSI benefit reduction attributable to the housing allowance will be capped at one-third of the federal benefit rate. In other cases, housing allowances will be considered earned income.

Excludes any cash or in-kind benefits provided under an AmeriCorps program from income consideration. Effective for benefits payable for months beginning 60 days after enactment.

2009 (Public Law 111-5, enacted February 17). A one-time economic recovery payment of \$250 to SSI recipients will not be taken into account as income for purposes of SSI.

The Making Work Pay tax credit, which provides a tax credit in the form of decreased withholding by employers, will not be counted as income.

2010 (Public Law 111-148, enacted March 23). Excludes incentives an SSI recipient with Medicaid receives for participating in an "Incentives for Prevention of Chronic Diseases in Medicaid" (IPCDM) program from consideration as income.

(Public Law 111-255, enacted October 5). Excludes the first \$2,000 received during a calendar year by an SSI recipient or spouse as compensation for participation in a clinical trial for rare diseases or conditions from consideration as income. The exclusion is effective for a 5-year period from date of enactment.

(Public Law 111-291, enacted December 8). Excludes any settlement payments to American Indians, under the Claims Resettlement Act of 2010, from consideration as income.

(Public Law 111-312, enacted December 17). Excludes federal tax refunds and advance payment of refundable tax credits received after December 31, 2009, but before January 1, 2013, from consideration as income.

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.

2005 *Regulations* permit exclusion of, regardless of value,

- One automobile if used for transportation for the beneficiary or a member of the beneficiary's household and
- Personal goods and household effects.

Special Exclusions

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

Tools and other property essential to self-support, 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. Individuals 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). Grants, scholarships, fellowships, or gifts to be used for tuition or educational fees for 9 months after the month of receipt.

2008 (Public Law 110-185, enacted February 13). A rebate payment received under the Economic Stimulus Act of 2008, and any other credit or refund under section 6428 of the Internal Revenue Code, would not be included as a resource during the month of receipt or the 2 following months.

(Public Law 110-245, enacted June 17). State-provided pensions for aged, blind, or disabled veterans (or their spouses). Effective for benefits payable for months beginning 60 days after enactment.

2009 (Public Law 111-5, enacted February 17). A one-time economic recovery payment of \$250 to SSI recipients will not be taken into account as a resource for the month of receipt and the following 9 months.

The Making Work Pay tax credit, which provides a tax credit in the form of decreased withholding by employers, will not be taken into account as a resource for the month of receipt and the following 2 months.

2010 (Public Law 111-148, enacted March 23). Excludes incentives an SSI recipient with Medicaid receives for participating in an IPCDM program from consideration as a resource.

(Public Law 111-255, enacted October 5). Excludes the first \$2,000 received during a calendar year by an SSI recipient or spouse as compensation for participation in a clinical trial for rare diseases or conditions from consideration as a resource.

(Public Law 111-291, enacted December 8). Excludes any settlement payments to American Indians, under the Claims Resettlement Act of 2010, from consideration as a resource (for a period of 12 months from receipt).

(Public Law 111-312, enacted December 17). Excludes federal tax refunds and advance payment of refundable tax credits received after December 31, 2009, but before January 1, 2013, from consideration as a resource (for a period of 12 months from receipt).

Transfer-of-Resources 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 eligibility criteria, 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.

2006 (Public Law 109-171, enacted February 8). Begins Medicaid coverage for children who are eligible for SSI effective the month the SSI application is filed or the first month of SSI eligibility, whichever is later. (Under prior law, Medicaid eligibility for such children began the month following the month of the SSI application or first eligibility.)

State Supplementation

1972 (Public Law 92-603, enacted October 30). States are given the option of providing supplementary payments both to recipients transferred from the state program and to those newly eligible for SSI.

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

“Hold harmless” protection, which limits a state’s fiscal liability to its share of expenditures for Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled for calendar year 1972, is provided to states electing federal administration of their supplementary plans. This provision applies only to supplementary payments that do not, on the average, exceed a state’s “adjusted payment level.” (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.

Attorney Fees

2004 (Public Law 108-203, enacted March 2). Extends the current OASDI attorney fee withholding process to SSI for a period of 5 years.

2010 (Public Law 111-142, enacted February 27). Permanently extends the OASDI attorney fee withholding process to SSI. The prior authority expired February 28, 2010. Allows direct payment of attorneys and certain nonattorney representatives.

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Medicare

The following are brief summaries of complex subjects as of November 1, 2010. They should be used only as overviews and general guides to the Medicare and Medicaid programs. The views expressed herein do not necessarily reflect the policies or legal positions of the Centers for Medicare & Medicaid Services (CMS) or the Department of Health and Human Services (HHS). These summaries do not render any legal, accounting, or other professional advice, nor are they intended to explain fully all of the provisions or exclusions of the relevant laws, regulations, and rulings of the Medicare and Medicaid programs. Original sources of authority should be researched and utilized.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 or older. In 1973, the following groups also became eligible for Medicare benefits: persons entitled to Social Security or Railroad Retirement disability cash benefits for at least 24 months, most persons with end-stage renal disease (ESRD), and certain otherwise noncovered aged persons who elect to pay a premium for Medicare coverage. Beginning in July 2001, persons with Amyotrophic Lateral Sclerosis (Lou Gehrig’s Disease) are allowed to waive the 24-month waiting period. Beginning March 30, 2010, individuals in the vicinity of Libby, Montana who are diagnosed with an asbestos-related condition are Medicare-eligible. Medicare eligibility could also apply to individuals in other areas who are diagnosed with a medical condition caused by exposure to a public health hazard for which a future public health emergency declaration is made under the Comprehensive Environmental Response, Compensation, and Liability Act of 1980 (Public Law 96-510). This very broad description of Medicare eligibility is expanded in the next section.

Medicare originally consisted of two parts: Hospital Insurance (HI), also known as Part A, and Supplementary Medical Insurance (SMI), which in the past was also

known simply as Part B. Part A helps pay for inpatient hospital, home health agency, skilled nursing facility, and hospice care. Part A is provided free of premiums to most eligible people; certain otherwise ineligible people may voluntarily pay a monthly premium for coverage. Part B helps pay for physician, outpatient hospital, home health agency, and other services. To be covered by Part B, all eligible people must pay a monthly premium (or have the premium paid on their behalf).

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 of 1997 (Public Law 105-33) and subsequently renamed and modified by the Medicare Prescription Drug, Improvement, and Modernization Act (MMA) of 2003 (Public Law 108-173). The Medicare Advantage program expands beneficiaries’ options for participation in private-sector health care plans.

The MMA also established a fourth part of Medicare, known as Part D, to help pay for prescription drugs not otherwise covered by Part A or Part B. Part D initially provided access to prescription drug discount cards, on a voluntary basis and at limited cost to all enrollees (except those entitled to Medicaid drug coverage) and, for low-income beneficiaries, transitional limited financial assistance for purchasing prescription drugs and a subsidized enrollment fee for the discount cards. This temporary plan began in mid-2004 and phased out during 2006. In 2006 and later, Part D provides subsidized access to prescription drug insurance coverage on a voluntary basis for all beneficiaries upon payment of a premium, with premium and cost-sharing subsidies for low-income enrollees.

Part D activities are handled within the SMI trust fund but in an account separate from Part B. It should thus be noted that the traditional treatment of “SMI” and “Part B” as synonymous is no longer accurate, since SMI now consists of Parts B and D. The purpose of the two separate accounts within the SMI trust fund is to ensure that funds from one part are not used to finance the other.

When Medicare began on July 1, 1966, approximately 19 million people enrolled. In 2011, almost 49 million are enrolled in one or both of Parts A and B of the Medicare program, and over 12 million of them have chosen to participate in a Medicare Advantage plan.

Entitlement and Coverage

Part A is generally provided automatically and free of premiums to persons aged 65 or older who are eligible for Social Security or Railroad Retirement benefits,

1. These summaries were prepared by Barbara S. Klees, Christian J. Wolfe, 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.

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. (As noted previously, the waiting period is waived for persons with Lou Gehrig's Disease, and certain persons in the Libby, Montana vicinity who are diagnosed with asbestos-related conditions are Medicare-eligible. It should also be noted that, over the years, there have been certain liberalizations made to both the waiting period requirement and the limit on earnings allowed for entitlement to Medicare coverage based on disability.) Part A coverage is also provided to insured workers with ESRD (and to insured workers' spouses and children with ESRD), as well as to some otherwise ineligible aged and disabled beneficiaries who voluntarily pay a monthly premium for their coverage. In 2010, Part A provided protection against the costs of hospital and specific other medical care to about 47 million people (over 39 million aged and almost 8 million disabled enrollees). Part A benefit payments totaled \$244.5 billion in 2010.

The following health care services are covered under Part A:

- Inpatient hospital care. Coverage includes costs of a semiprivate room, meals, regular nursing services, operating and recovery rooms, intensive care, inpatient prescription drugs, laboratory tests, X-rays, psychiatric hospitals, inpatient rehabilitation, and long-term care hospitalization when medically necessary, as well as all other medically necessary services and supplies provided in the hospital. An initial deductible payment is required of beneficiaries who are admitted to a hospital, plus copayments for all hospital days following day 60 within a benefit period (described later).
- Skilled nursing facility (SNF) care. Coverage is provided by Part A only if the care follows within 30 days (generally) a hospitalization of 3 days or more and is certified as medically necessary. Covered services are similar to those for inpatient hospital care, and 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 (covered by Parts A and B). The Balanced Budget Act transferred

from Part A to Part B those home health services furnished on or after January 1, 1998, that are unassociated with a hospital or SNF stay. Part A will continue to cover the first 100 visits following a 3-day hospital stay or a SNF stay; Part B covers any visits thereafter. Home health care under Parts A and B has no copayment and no deductible.

HHA care, including care provided by a home health aide, may be furnished part time by an HHA in the residence of a homebound beneficiary, if intermittent or part-time skilled nursing and/or certain other therapy or rehabilitation care is necessary. Certain medical supplies and durable medical equipment may also be provided, although beneficiaries must pay a 20 percent coinsurance for durable medical equipment, as required under Part B of Medicare. There must be a plan of treatment and periodic review by a physician. Full-time nursing care, food, blood, and drugs are not provided as HHA services.

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

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

All citizens (and certain legal aliens) aged 65 or older, and all disabled persons entitled to coverage under Part A, are eligible to enroll in Part B on a voluntary basis by payment of a monthly premium. Almost all persons entitled to Part A choose to enroll in Part B. In 2010,

Part B provided protection against the costs of physician and other medical services to about 44 million people (almost 37 million aged and over 7 million disabled enrollees). Part B benefits totaled \$209.7 billion in 2010.

Part B covers certain medical services and supplies, including the following:

- Physicians' and surgeons' services, including some covered services furnished by chiropractors, podiatrists, dentists, and optometrists;
- Services provided by Medicare-approved practitioners who are not physicians, including certified registered nurse anesthetists, clinical psychologists, clinical social workers (other than in a hospital or SNF), physician assistants, and nurse practitioners and clinical nurse specialists in collaboration with a physician;
- Services in an emergency room, outpatient clinic, or ambulatory surgical center, including same-day surgery;
- Home health care not covered under Part A;
- Laboratory tests, X-rays, and other diagnostic radiology services;
- Certain preventive care services and screening tests;
- Most physical and occupational therapy and speech pathology services;
- Comprehensive outpatient rehabilitation facility services, and mental health care in a partial hospitalization psychiatric program, if a physician certifies that inpatient treatment would be required without it;
- Radiation therapy; renal (kidney) dialysis and transplants; heart, lung, heart-lung, liver, pancreas, and bone marrow transplants; and, as of April 2001, intestinal transplants;
- Approved durable medical equipment for home use, such as oxygen equipment and wheelchairs, prosthetic devices, and surgical dressings, splints, casts, and braces;
- Drugs and biologicals that are not usually self-administered, such as hepatitis B vaccines and immunosuppressive drugs (certain self-administered anticancer drugs are covered);
- Certain services specific to people with diabetes; and
- Ambulance services, when other methods of transportation are contraindicated.

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 certain outpatient hospital services). The preceding description of Part B-covered services should be used only as a general guide, due to the wide range of services covered under Part B and the quite specific rules and regulations that apply.

Medicare Parts A and B, as described above, constitute the original fee-for-service Medicare program. Medicare Part C, also known as Medicare Advantage, is an alternative to traditional Medicare. Although all Medicare beneficiaries can receive their benefits through the traditional fee-for-service program, most beneficiaries enrolled in both Part A and Part B can choose to participate in a Medicare Advantage plan instead. Medicare Advantage plans are offered by private companies and organizations and are required to provide at least those services covered by Parts A and B, except hospice services. These plans may (and in certain situations must) provide extra benefits (such as vision or hearing) or reduce cost sharing or premiums. The primary Medicare Advantage plans are:

- Local coordinated care plans (LCCPs), including health maintenance organizations (HMOs), provider-sponsored organizations, local preferred provider organizations (PPOs), and other certified coordinated care plans and entities that meet the standards set forth in the law. Generally, each plan has a network of participating providers. Enrollees may be required to use these providers or, alternatively, may be allowed to go outside the network but pay higher cost-sharing fees for doing so.
- Regional PPO plans, which began in 2006 and offer coverage to one of 26 defined regions. Like local PPOs, regional PPOs have networks of participating providers, and enrollees must use these providers or pay higher cost-sharing fees. However, regional PPOs are required to provide beneficiary financial protection in the form of limits on out-of-pocket cost sharing, and there are specific provisions to encourage regional PPO plans to participate in Medicare.
- Private fee-for-service (PFFS) plans, which were not required to have networks of participating providers through 2010. In 2011, this is still the case for PFFS plans in areas (usually counties) with fewer than two network-based LCCPs and/or regional PPOs, and members may go to any Medicare provider willing to accept the plan's payment. However, for PFFS plans in network areas with two or more network-based LCCPs and/or regional PPOs, provider networks are

mandatory, and members may be required to use these participating providers.

- Special Needs Plans, which are restricted to beneficiaries who are dually eligible for Medicare and Medicaid, live in long-term care institutions, or have certain severe and disabling conditions.

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

Beginning in 2006, Part D provides subsidized access to prescription drug insurance coverage on a voluntary basis, upon payment of a premium, to individuals entitled to Part A or enrolled in Part B, with premium and cost-sharing subsidies for low-income enrollees. Beneficiaries may enroll in either a stand-alone prescription drug plan (PDP) or an integrated Medicare Advantage plan that offers Part D coverage. Enrollment began in late 2005. In 2010, Part D provided protection against the costs of prescription drugs to about 34 million people. Part D benefits totaled \$61.7 billion in 2010.

Part D coverage includes most FDA-approved prescription drugs and biologicals. (The specific drugs currently covered in Parts A and B remain covered there.) However, plans may set up formularies for their prescription drug coverage, subject to certain statutory standards. Part D coverage can consist of either standard coverage (defined later) or an alternative design that provides the same actuarial value. For an additional premium, plans may also offer supplemental coverage exceeding the value of basic coverage.

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

Program Financing, Beneficiary Liabilities, and Payments to Providers

All financial operations for Medicare are handled through two trust funds, one for Hospital Insurance (HI, Part A) and one for Supplementary Medical Insurance

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

Program Financing

The HI trust fund is financed primarily through a mandatory payroll tax. Almost all employees and self-employed workers in the United States work in employment covered by Part A and pay taxes to support the cost of benefits for aged and disabled beneficiaries. The Part A tax rate is 1.45 percent of earnings, to be paid by each employee and a matching amount by the employer for each employee, and 2.90 percent for self-employed persons. Beginning in 1994, this tax is paid on all covered wages and self-employment income without limit. (Prior to 1994, the tax applied only up to a specified maximum amount of earnings.) Beginning in 2013, an additional Part A payroll tax of 0.9 percent will be collected on earned income in excess of \$200,000 (for those filing income tax singly) and \$250,000 (for those filing jointly; the earnings thresholds are not indexed). 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:

- a portion of the income taxes levied on Social Security benefits paid to high-income beneficiaries;
- premiums from certain persons who are not otherwise eligible and choose to enroll voluntarily;
- reimbursements from the general fund of the U.S. Treasury for the cost of providing Part A coverage to (1) certain aged persons who retired when Part A began and thus were unable to earn sufficient quarters of coverage (the last surviving members of this group have died, and these reimbursements are complete) and (2) those federal retirees similarly unable to earn sufficient quarters of Medicare-qualified federal employment;
- interest earnings on its invested assets; and
- other small miscellaneous income sources.

Payroll taxes are used mainly to pay benefits for current beneficiaries.

The SMI trust fund differs fundamentally from the HI trust fund with regard to the nature of its financing. As

previously noted, SMI is now composed of two parts, Part B and Part D, each with its own separate account within the SMI trust fund. The nature of the financing for both parts of SMI is similar, in that both parts are primarily financed by contributions from the general fund of the U.S. Treasury and (to a much lesser degree) by beneficiary premiums.

For Part B, the contributions from the general fund of the U.S. Treasury are the largest source of income, since beneficiary premiums are generally set at a level that covers 25 percent of the average expenditures for aged beneficiaries. The standard Part B premium rate will be \$99.90 per beneficiary per month in 2012. There are, however, three provisions that can alter the premium rate for certain enrollees. First, penalties for late enrollment (that is, enrollment after an individual's initial enrollment period) may apply, subject to certain statutory criteria. Second, beginning in 2007, beneficiaries whose income is above certain thresholds are required to pay an income-related monthly adjustment amount, in addition to their standard monthly premium. Finally, a "hold-harmless" provision, which prohibits increases in the standard Part B premium from exceeding the dollar amount of an individual's Social Security cost-of-living adjustment, lowers the premium rate for certain individuals who have their premiums deducted from their Social Security checks.

Under the "hold-harmless" provision, the Part B premium for 2010 remained at the 2009 amount of \$96.40 for about 73 percent of Part B enrollees because the Social Security cost-of-living adjustment was 0 percent for 2010. Higher premium amounts (\$110.50 or more) were in effect for about 27 percent of Part B enrollees, all of whom were ineligible for protection under this provision. Those not protected included most new enrollees during the year, enrollees with high incomes who were subject to the income-related monthly adjustment amount, and enrollees—such as certain federal, state, and local government retirees—who did not have their Part B premium withheld from a Social Security check. Also not protected were Medicare-Medicaid dual beneficiaries whose Part B premiums were paid by state Medicaid programs. The increase in the standard Part B premium rate, from \$96.40 to \$110.50, was higher than it otherwise would have been because the cost of adequately funding Part B was spread across a minority of enrollees, rather than across all of them.

For 2011, the Social Security cost-of-living adjustment was again 0 percent. Hence, under the "hold-harmless" provision, most enrollees continued to pay the same \$96.40 or \$110.50 Part B premium amount in 2011 that they paid in 2010, with the majority of those enrollees paying \$96.40. The standard premium rate of \$115.40

was in effect only for those enrollees who were not eligible for protection under the "hold-harmless" provision. As in 2010, in order for Part B to be adequately funded in 2011, the 2011 contingency margin had to be increased to account for this situation, and, as a result, a larger-than-usual premium increase was again borne by a minority of Part B enrollees. For 2012, the Social Security cost-of-living adjustment will be large enough, in most cases, to cover the increase in the Part B premium of \$3.50 that most beneficiaries will experience. The "hold-harmless" provision will apply to those individuals who have their premiums deducted from their Social Security checks and for whom the cost-of-living adjustment is less than \$3.50. For those paying \$110.50 or \$115.40 in 2011, the Part B premium will decrease in 2012.

The 2012 Part B income-related monthly adjustment amounts and total monthly premium amounts to be paid by beneficiaries, according to income level and filing status, are shown in the following table.

2012 Part B income-related monthly adjustment amounts and total monthly premium amounts to be paid by beneficiaries, by filing status and income level

Income	Income-related monthly adjustment (dollars)	Total monthly premium (dollars)
<i>Beneficiaries who file individual tax returns and are single individuals, heads of households, qualifying widow(ers) with dependent children, or married individuals who lived apart from their spouse for the entire taxable year and file separately</i>		
Less than or equal to \$85,000	0	99.90
Greater than \$85,000 and less than or equal to \$107,000	40.00	139.90
Greater than \$107,000 and less than or equal to \$160,000	99.90	199.80
Greater than \$160,000 and less than or equal to \$214,000	159.80	259.70
Greater than \$214,000	219.80	319.70
<i>Beneficiaries who file joint tax returns</i>		
Less than or equal to \$170,000	0	99.90
Greater than \$170,000 and less than or equal to \$214,000	40.00	139.90
Greater than \$214,000 and less than or equal to \$320,000	99.90	199.80
Greater than \$320,000 and less than or equal to \$428,000	159.80	259.70
Greater than \$428,000	219.80	319.70
<i>Beneficiaries who are married and lived with their spouse at any time during the year but file separate tax returns</i>		
Less than or equal to \$85,000	0	99.90
Greater than \$85,000 and less than or equal to \$129,000	159.80	259.70
Greater than \$129,000	219.80	319.70

For Part D, as with Part B, general fund contributions account for the largest source of income, since Part D beneficiary premiums are to represent, on average, 25.5 percent of the cost of standard coverage. The Part D base beneficiary premium for 2012 will be \$31.08. The actual Part D premium paid by an individual beneficiary equals the base beneficiary premium adjusted by a number of factors. In practice, premiums vary significantly from one Part D plan to another and seldom equal the base beneficiary premium. As of this writing, it is estimated that the average monthly premium for basic Part D coverage, which reflects the specific plan-by-plan premiums and the estimated number of beneficiaries in each plan, will be about \$30 in 2012. Penalties for late enrollment may apply. (Late enrollment penalties do not apply to enrollees who have maintained creditable prescription drug coverage.) Beneficiaries meeting certain low-income and limited-resources requirements pay substantially reduced premiums or no premiums at all (and are not subject to late enrollment penalties).

Beginning in 2011, beneficiaries with income above certain thresholds are required to pay an income-related monthly adjustment amount, in addition to their monthly premium. The 2012 Part D income-related monthly adjustment amounts to be paid by beneficiaries, according to income level and filing status, are shown in the following table.

2012 Part D income-related monthly adjustment amounts to be paid by beneficiaries, by filing status and income level

Income	Income-related monthly adjustment (dollars)
Beneficiaries who file individual tax returns and are single individuals, heads of households, qualifying widow(er)s with dependent children, or married individuals who lived apart from their spouse for the entire taxable year and file separately	
Less than or equal to \$85,000	0
Greater than \$85,000 and less than or equal to \$107,000	11.60
Greater than \$107,000 and less than or equal to \$160,000	29.90
Greater than \$160,000 and less than or equal to \$214,000	48.10
Greater than \$214,000	66.40
Beneficiaries who file joint tax returns	
Less than or equal to \$170,000	0
Greater than \$170,000 and less than or equal to \$214,000	11.60
Greater than \$214,000 and less than or equal to \$320,000	29.90
Greater than \$320,000 and less than or equal to \$428,000	48.10
Greater than \$428,000	66.40
Beneficiaries who are married and lived with their spouse at any time during the year but file separate tax returns	
Less than or equal to \$85,000	0
Greater than \$85,000 and less than or equal to \$129,000	48.10
Greater than \$129,000	66.40

In addition to contributions from the general fund of the U.S. Treasury and beneficiary premiums, Part D also receives payments from the states. With the availability of prescription drug coverage and low-income subsidies under Part D, Medicaid is no longer the primary payer for prescription drugs for Medicaid beneficiaries who also have Medicare, and states are required to defray a portion of Part D expenditures for those beneficiaries.

During the Part D transitional period that began in mid-2004 and phased out during 2006, the general fund of the U.S. Treasury financed the transitional assistance benefit for low-income beneficiaries. Funds were transferred to, and paid from, a Transitional Assistance account within the SMI trust fund.

The SMI trust fund also receives income from interest earnings on its invested assets, as well as a small amount of miscellaneous income. It is important to note that beneficiary premiums and general fund payments for Parts B and D are redetermined annually and separately.

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

Beneficiary Payment Liabilities

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

In Medicare Advantage plans, the beneficiary's payment share is based on the cost-sharing structure of the specific plan selected by the beneficiary, since each plan has its own requirements. Most plans have lower deductibles and coinsurance than are required of fee-for-service beneficiaries. Such beneficiaries, in general, pay the monthly Part B premium. However, some Medicare Advantage plans may pay part or all of the Part B premium for their enrollees as an added benefit. Depending on the plan, enrollees may also pay an additional premium for certain extra benefits provided (or, in a small number of cases, for certain Medicare-covered services).

For hospital care covered under Part A, a beneficiary's fee-for-service payment share includes a one-time deductible amount at the beginning of each benefit period (\$1,156 in 2012). This deductible covers the beneficiary's part of the first 60 days of each spell of inpatient hospital care. If continued inpatient care is needed beyond the 60 days, additional coinsurance payments (\$289 per day in 2012) are required through the 90th day of a benefit period. Each Part A beneficiary also has a "lifetime reserve" of 60 additional hospital days that may be used when the covered days within a benefit period have been exhausted. Lifetime reserve days may be used only once, and coinsurance payments (\$578 per day in 2012) are required.

For skilled nursing care covered under Part A, Medicare fully covers the first 20 days of SNF care in a benefit period. But for days 21 through 100, a copayment (\$144.50 per day in 2012) is required from the beneficiary. After 100 days per benefit period, Medicare pays nothing for SNF care. Home health care requires no deductible or coinsurance payment by the beneficiary. In any Part A service, the beneficiary is responsible for fees to cover the first 3 pints or units of nonreplaced blood per calendar year. The beneficiary has the option of paying the fee or of having the blood replaced.

There are no premiums for most people covered by Part A. Eligibility is generally earned through the work experience of the beneficiary or of the beneficiary's spouse. However, most aged people who are otherwise ineligible for premium-free Part A coverage can enroll voluntarily by paying a monthly premium, if they also enroll in Part B. For people with fewer than 30 quarters of coverage as defined by the Social Security Administration (SSA), the Part A monthly premium rate will be \$451 in 2012; for those with 30 to 39 quarters of coverage, the rate will be reduced to \$248. Penalties for late enrollment may apply. Voluntary coverage upon payment of the Part A premium, with or without enrolling in Part B, is also available to disabled individuals for whom coverage has ceased because earnings are in excess of those allowed.

The Part B beneficiary's payment share includes the following: one annual deductible (\$140 in 2012), the monthly premiums, the coinsurance payments for Part B services (usually 20 percent of the remaining allowed charges with certain exceptions noted below), a deductible for blood, certain charges above the Medicare-allowed charge (for claims not on assignment), and payment for any services not covered by Medicare. For outpatient mental health services, the beneficiary is liable for 45 percent of the approved charges in 2011. This percentage will phase down to 40 percent in 2012, 35 percent in 2013, and 20 percent in 2014 and thereafter. For services reimbursed under the outpatient

hospital prospective payment system, coinsurance percentages vary by service and currently fall in the range of 20 percent to 50 percent. There are no deductibles or coinsurance for certain services, such as clinical lab tests, HHA services, and some preventive care services (including an initial, "Welcome to Medicare" preventive physical examination and, beginning in 2011, an annual wellness visit to develop or update a prevention plan).

For the standard Part D benefit design, there is an initial deductible (\$320 in 2012). After meeting the deductible, the beneficiary pays 25 percent of the remaining costs, up to an initial coverage limit (\$2,930 in 2012). A coverage gap starts after an individual's drug costs reach the initial coverage limit and stops when the beneficiary incurs a certain threshold of out-of-pocket costs (\$4,700 in 2012). Previously, the beneficiary had to pay the full cost of prescription drugs while in this coverage gap. However, under the Patient Protection and Affordable Care Act (Public Law 111-148) as amended by the Health Care and Education Reconciliation Act of 2010 (Public Law 111-152)—collectively referred to as the Affordable Care Act—a beneficiary (excluding low-income enrollees eligible for cost-sharing subsidies) who entered the coverage gap in 2010 received a \$250 rebate, and an enrollee entering in 2011 receives a 50-percent manufacturer discount for covered brand-name prescription drugs and 7-percent coverage from his or her plan for covered generic drugs. A beneficiary entering the coverage gap in 2012 will receive a 50-percent manufacturer discount for covered brand-name prescription drugs and 14-percent coverage from his or her plan for covered generic drugs. Additional reductions in beneficiary cost sharing in the coverage gap continue in future years such that, by 2020, the coverage gap will be fully phased out, with the beneficiary responsible for 25 percent of prescription drug costs. (The 2012 out-of-pocket threshold of \$4,700 is equivalent to estimated average total covered drug spending of \$6,730.39 under the defined standard benefit design, during the initial coverage period and the coverage gap, for enrollees not eligible for low-income cost-sharing subsidies. This amount includes the 50-percent manufacturer discount for covered brand-name drugs during the coverage gap, even though the beneficiary does not pay it, but does not include the 14-percent coverage from the beneficiary's plan for generic drugs.)

For costs incurred after reaching the out-of-pocket threshold, catastrophic coverage is provided, which requires the enrollee to pay the greater of 5 percent coinsurance or a small defined copayment amount (\$2.60 in 2012 for generic or preferred multisource drugs and \$6.50 in 2012 for other drugs). The benefit parameters are indexed annually to the growth in average per capita Part D costs. Beneficiaries meeting certain low-income and limited-resources requirements pay

substantially reduced cost-sharing amounts. In determining out-of-pocket costs, only those amounts actually paid by the enrollee or another individual (and not reimbursed through insurance) are counted; the exceptions to this “true out-of-pocket” provision are cost-sharing assistance from the low-income subsidies provided under Part D and from State Pharmacy Assistance programs and, starting in 2011, the 50-percent discount on brand-name drugs purchased by enrollees in the Part D coverage gap.

Many Part D plans offer alternative coverage that differs from the standard coverage described above. In fact, the majority of beneficiaries are not enrolled in the standard benefit design but rather in plans with low or no deductibles, flat payments for covered drugs, and, in some cases, additional partial coverage in the coverage gap. The monthly premiums required for Part D coverage are described in the previous section.

Payments to Providers

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 the PPS for acute inpatient hospitals, each stay is categorized into a diagnosis-related group (DRG). Each DRG has a specific predetermined amount associated with it, which serves as the basis for payment. A number of adjustments are applied to the DRG’s specific predetermined amount to calculate the payment for each stay. In some cases the payment the hospital receives is less than the hospital’s actual cost for providing Part A–covered inpatient hospital services for the stay; in other cases it is more. The hospital absorbs the loss or makes a profit. Certain payment adjustments exist for extraordinarily costly inpatient hospital stays and other situations. Payments for skilled nursing care, home health care, inpatient rehabilitation hospital care, long-term care hospitals, inpatient psychiatric hospitals, and hospice are made under separate prospective payment systems.

For nonphysician Part B services, home health care is reimbursed under the same prospective payment system as Part A, most hospital outpatient services are reimbursed on a separate prospective payment system, and most payments for clinical laboratory and ambulance services are based on fee schedules. A fee schedule is a comprehensive listing of maximum fees used to pay providers. Most durable medical equipment has also been paid on a fee schedule in recent years but is paid based on a competitive bidding process in some areas beginning January 1, 2011. This competitive bidding process will be expanded to all areas within the next several years.

In general, the prospective payment systems and fee schedules used for Part A and non-physician Part B services are increased each year either by indices related to the “market basket” of goods and services that the provider must purchase or by indices related to the Consumer Price Index (CPI). These indices vary by type of provider. The Affordable Care Act mandates reductions in most of these payment updates. In most cases, the payment updates are reduced by stipulated amounts for 2010–2019 and are further and permanently reduced by growth in economy-wide productivity. Starting dates and amounts of reductions vary by provider. It is likely that the lower payment increases will not be viable in the long range. The best available evidence indicates that most health care providers cannot improve their productivity to this degree because of the labor-intensive nature of most of these services.

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. Since January 1992, allowed charges have been defined as the lesser of (1) the submitted charges or (2) the amount determined by a fee schedule based on a relative value scale. In practice, most allowed charges are based on the fee schedule, which is supposed to be updated each year by a Sustainable Growth Rate (SGR) system prescribed in the law. However, over the past 9 years, the SGR system would have required significant fee reductions for physicians, and Congress has passed a series of bills to override the reductions.

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 beneficiaries in the original Medicare fee-for-service program may select their doctors, they can choose participating physicians.

Medicare Advantage plans and their precursors have generally been paid on a capitation basis, meaning that a fixed, predetermined amount per month per member is paid to the plan, without regard to the actual number and nature of services used by the members. The specific mechanisms to determine the payment amounts have

changed over the years. In 2006, Medicare began paying capitated payment rates to plans based on a competitive bidding process.

For Part D, each month for each plan member, Medicare pays stand-alone PDPs and the prescription drug portions of Medicare Advantage plans their risk-adjusted bid, minus the enrollee premium. Plans also receive payments representing premiums and cost-sharing amounts for certain low-income beneficiaries for whom these items are reduced or waived. Under the reinsurance provision, plans receive payments for 80 percent of costs in the catastrophic coverage category.

To help them gain experience with the Medicare population, Part D plans are protected by a system of “risk corridors” that allow Medicare to assist with unexpected costs and share in unexpected savings. The risk corridors became less protective after 2007.

Under Part D, Medicare provides certain subsidies to employer and union PDPs that continue to offer coverage to Medicare retirees and meet specific criteria in doing so. These retiree drug subsidy (RDS) payments are tax-exempt, but will be taxable under the Affordable Care Act beginning in 2013.

Claims Processing

Since the inception of Medicare, fee-for-service claims have been processed by nongovernment organizations or agencies under contract to serve as the fiscal agent between providers and the federal government. These entities apply the Medicare coverage rules to determine appropriate reimbursement amounts and make payments to the providers and suppliers. Their responsibilities also include maintaining records, establishing controls, safeguarding against fraud and abuse, and assisting both providers and beneficiaries as needed.

Until recently, contractors known as fiscal intermediaries processed Part A claims for institutional services, including claims for inpatient hospital, SNF, HHA, and hospice services. They also processed outpatient hospital claims for Part B. Similarly, contractors known as carriers handled Part B claims for services by physicians and medical suppliers. By law, prior to 2003, the Centers for Medicare & Medicaid Services (CMS) was required to select fiscal intermediaries from among companies that were nominated by health care provider associations and to select carriers from among health insurers or similar companies.

The MMA mandated the replacement of that system with a new system of entities known as Medicare Administrative Contractors (MACs). Each MAC processes and

pays fee-for-service claims for both Part A and Part B services to all providers and suppliers within its geographical jurisdiction. Currently, Part A and Part B claims are processed by fifteen “A/B MACs,” with the exception of (1) durable medical equipment claims, which are processed by four specialty MACs, and (2) home health and hospice claims, which were originally processed by four other specialty MACs but will eventually be processed by the A/B MACs. MACs are selected through a competitive procedure. CMS began phasing the new system in during 2005, and expects to complete the transition during 2012. Jurisdictions will likely be consolidated gradually over several years thereafter.

This new system is intended to improve Medicare services to beneficiaries, providers, and suppliers, who now have a single point of contact for all claims-related business. CMS will evaluate the new MACs based in part on customer satisfaction with their services. The new system enables the Medicare fee-for-service program to benefit from economies of scale and competitive performance contracting.

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

Part D plans are responsible for processing their claims, akin to Part C. However, because of the “true out-of-pocket” provision discussed previously, CMS has contracted the services of a facilitator, who works with CMS, Part D drug plans (stand-alone PDPs and the prescription drug portions of Medicare Advantage plans), and carriers of supplemental drug coverage to coordinate benefit payments and track the sources of cost-sharing payments. Claims under Part D also have to be submitted by the plans to CMS, so that certain payments based on actual experience (such as payments for low-income cost-sharing and premium subsidies, reinsurance, and risk corridors) can be determined.

Because of its size and complexity, Medicare is vulnerable to improper payments, ranging from inadvertent errors to outright fraud and abuse. Although providers are responsible for submitting accurate claims, and MACs are responsible for ensuring that only such claims are paid, there are additional groups whose duties include the prevention, reduction, and recovery of improper payments.

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 improve the effectiveness, efficiency, economy, and quality of services delivered to Medicare beneficiaries. One function of QIOs is to

ensure that Medicare pays only for services and goods that are reasonable and necessary and that are provided in the most appropriate setting.

The ongoing effort to address improper payments intensified after enactment of the Health Insurance Portability and Accountability Act (HIPAA) of 1996 (Public Law 104-191), which created the Medicare Integrity Program (MIP). The MIP provides CMS with dedicated funds to identify and combat improper payments, including those caused by fraud and abuse, and, for the first time, allows CMS to award contracts competitively with entities other than carriers and intermediaries to conduct these activities. MIP funds are used for (1) audits of cost reports, which are financial documents that hospitals and other institutions are required to submit annually to CMS; (2) medical reviews of claims to determine whether services provided are medically reasonable and necessary; (3) determinations of whether Medicare or other insurance sources have primary responsibility for payment; (4) identification and investigation of potential fraud cases; and (5) education to inform providers about appropriate billing procedures. In addition to creating the MIP, HIPAA established a fund to provide resources for the Department of Justice—including the Federal Bureau of Investigation—and the Office of Inspector General (OIG) within the Department of Health and Human Services (HHS) to investigate and prosecute health care fraud and abuse.

The Deficit Reduction Act (DRA) of 2005 (Public Law 109-171) established and funded the Medicare-Medicaid Data Match Program, which is designed to identify improper billing and utilization patterns by matching Medicare and Medicaid claims information. As is the case under the MIP, CMS can contract with third parties. The funds also can be used (1) to coordinate actions by CMS, the states, the Attorney General, and the HHS OIG to prevent improper Medicaid and Medicare expenditures and (2) to increase the effectiveness and efficiency of both Medicare and Medicaid through cost avoidance, savings, and the recoupment of fraudulent, wasteful, or abusive expenditures.

The Affordable Care Act includes many provisions intended to improve the accuracy of payments and to link those payments to quality and efficiency in the Medicare program. One of the most important provisions establishes the Center for Medicare and Medicaid Innovation (CMMI) in CMS to test innovative payment and service delivery models, with the goal of reducing Medicare, Medicaid, and the Children's Health Insurance Program (CHIP) expenditures while preserving or enhancing quality of care.

Administration

HHS has the overall responsibility for administration of the Medicare program. Within HHS, responsibility for administering Medicare rests with CMS. The Social Security Administration (SSA) assists, however, by initially determining an individual's Medicare entitlement, by withholding Part B premiums from the Social Security benefit checks of most beneficiaries, and by maintaining Medicare data on the Master Beneficiary Record, which is SSA's primary record of beneficiaries.

The MMA requires SSA to undertake a number of additional Medicare-related responsibilities, including making low-income subsidy determinations under Part D, notifying individuals of the availability of Part D subsidies, withholding Part D premiums from monthly Social Security cash benefits for beneficiaries who request such an arrangement, and, for 2007 and later, determining the individual's Part B premium if the Part B income-related monthly adjustment applies. For 2011 and later, the Affordable Care Act requires SSA to determine the individual's Part D premium if the Part D income-related monthly adjustment applies. The Internal Revenue Service (IRS) in the Department of the Treasury collects the Part A payroll taxes from workers and their employers. IRS data, in the form of income tax returns, play a role in determining which Part D enrollees are eligible for low-income subsidies (and to what degree) and which Part B and Part D enrollees are subject to the income-related monthly adjustment amounts in their premiums (and to what degree).

A Medicare 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.

Medicare Financial Status

Medicare is the largest health care insurance program—and the second-largest social insurance program—in the United States. Medicare is also complex, and it

faces a number of financial challenges in both the short term and the long term. These challenges include:

- The solvency of the HI trust fund, which fails the Medicare Board of Trustees' test of short-range financial adequacy, as annual expenditures are projected to exceed annual assets within 10 years.
- The long-range health of the HI trust fund, as the trust fund fails the Trustees' long-range test of close actuarial balance.
- The rapid growth projected for SMI costs as a percent of Gross Domestic Product. (The Part B and Part D accounts in the SMI trust fund are automatically in financial balance—in both the short range and the long range—since premiums and general revenue financing rates are reset each year to match estimated costs.)
- The substantial reductions in Part B physician payment rates required under the Sustainable Growth Rate system in current law. In recent years, Congress has consistently passed legislation that overrides the reductions (also discussed above).
- The likelihood that the lower payment rate updates to most categories of Medicare providers for 2011 and later, as mandated by the Affordable Care Act, will not be viable in the long range (also discussed above).

A detailed description of these issues is beyond the scope of this summary. For more information, see the Medicare Trustees Report (<https://www.cms.gov/ReportsTrustFunds/>).

Data Summary

The Medicare program covers 95 percent of our nation's aged population, as well as many people who receive Social Security disability benefits. In 2010, Part A covered over 47 million enrollees with benefit payments of \$244.5 billion, Part B covered almost 44 million enrollees with benefit payments of \$209.7 billion, and Part D covered over 34 million enrollees with benefit payments of \$61.7 billion. Administrative costs in 2010 were about 1.4 percent, 1.5 percent, and 0.6 percent of expenditures for Part A, Part B, and Part D, respectively. Total expenditures for Medicare in 2010 were \$522.8 billion.

Medicare: History of Provisions

This section is a summary of selected Medicare provisions, based on general interest, as of November 1, 2011. 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.** Three 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 on the basis of QC for earnings as federal employees or on the basis of deemed QC for earnings as federal employees before 1983.
- 1983.** Employees of nonprofit organizations, effective January 1, 1984.
- 1986.** Mandatory coverage for state and local government employees not covered under Social Security and hired after March 31, 1986.
- 1987.** Second waiting period eliminated if a former disabled beneficiary becomes entitled again (no time limit).
- 1989.** Disabled individuals under 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.
- 2010.** Individuals in the vicinity of Libby, Montana who are diagnosed with an asbestos-related condition are Medicare-eligible beginning March 30, 2010. Medicare eligibility could also apply to individuals in other areas who are diagnosed with a medical condition caused by exposure to a public health hazard for which a future public health emergency is declared under the Comprehensive Environmental Response, Compensation, and Liability Act of 1980.

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, except those enrolled in Medicaid and entitled to Medicaid outpatient drug coverage, upon voluntary participation with payment of up to \$30 annual enrollment fee. Under a Transitional Assistance provision, a drug card-eligible beneficiary whose income does not exceed 135 percent of the federal poverty level and does not have third-party prescription drug coverage is entitled to further benefits. Enrollment begins in May 2004, access to discounts begins in June 2004, and program phases out as drug benefit becomes available in 2006 (see next entry).

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

Medicare Benefits

Under Part A

- 1965.** In each benefit period, inpatient hospital services, 90 days. Includes semiprivate accommodations, operating room, hospital equipment (including renal dialysis), laboratory tests and X-ray, drugs, dressings, general nursing services, and services of interns and residents in medical osteopathic or dentistry training. Inpatient psychiatric hospital care limited to 190-day lifetime maximum. Outpatient hospital diagnostic services. Post-hospital extended-care services, 100 days (including physical, occupational, and speech therapy). Post-hospital home health services, 100 visits. Deductible and coinsurance provisions (see Table 2.C1).
- 1967.** Lifetime reserve of 60 additional days of inpatient hospital services. Outpatient hospital diagnostic services transferred to SMI.
- 1972.** Services of interns and residents in podiatry training.
- 1980.** Unlimited home health visits in a year. Requirement for prior hospitalization eliminated. Home health services provided for up to 4 days a week and up to 21 consecutive days.
- Alcohol detoxification facility services.
- 1981.** Part A coinsurance is based on the deductible for the calendar year in which services are received rather than the deductible in effect at the time the beneficiary's spell of illness began, starting in 1982.
- Alcohol detoxification facility services eliminated.
- 1982.** Beneficiaries expected to live 6 months or less may elect to receive hospice care benefits instead of other Medicare benefits. May elect maximum of two

90-day and one 30-day hospice care periods, effective November 1, 1983, to October 1, 1986.

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

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

Hospice care benefit (enacted in 1982) made permanent.

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

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

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

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

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

All 1988 provisions became effective January 1, 1989.

1989. The spell of illness and benefit period coverage of laws before 1988 return to the determination of inpatient hospital benefits in 1990 and later. After the deductible is paid in benefit period, Medicare pays 100 percent of covered costs for the first 60 days of inpatient hospital care. Coinsurance applies for the next 30 days in a benefit period.

The requirement for a prior hospital stay of 3 or more consecutive days is reinstated for SNF 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 SNF 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 an SNF stay. The cost to the SMI trust fund of the transferred services will phase in over a 6-year period (that is, the HI trust fund will transfer funds to the SMI trust fund during that period).

Limits on the number of hours and days that home health care can be provided have been clarified. *Part-time* now defined as skilled nursing and home health aide services (combined) furnished any number of days per week, for less than 8 hours per day and 28 or fewer hours per week. *Intermittent* now defined as skilled nursing care provided for fewer than 7 days each week, or less than 8 hours each day (combined) for 21 days or less.

Hospice benefit periods are restructured to include two 90-day periods, followed by an unlimited number of 60-day periods.

Medicare coverage provided for a number of prevention initiatives, most of which are covered under SMI program. HI program affected mainly by two of the initiatives: (1) annual prostate cancer screening for male beneficiaries aged 50 or older, effective January 1, 2000, and (2) colorectal screening procedures, including fecal-occult blood tests and flexible sigmoidoscopies, for beneficiaries aged 50 or older, colonoscopy for beneficiaries at high risk for colorectal cancer, and other procedures, including screening barium enemas under certain circumstances.

2000. The homebound criterion for home health services is clarified to specify that beneficiaries who require home health services may attend adult day care for therapeutic, psychosocial, or medical treatment and still remain eligible for the home health benefit. Homebound beneficiaries may also attend religious services without being disqualified from receiving home health benefits.

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

Under Part B

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

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

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

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

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

1977. Services in rural health clinics.

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

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

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

Recognizes comprehensive outpatient rehabilitation facilities as Medicare providers.

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

1984. Hepatitis B and pneumococcal vaccines and blood clotting factors and necessary supplies are included as Part B benefits. Debridement of mycotic toenails is limited.

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

1986. Includes vision care services furnished by an optometrist.

For occupational therapy services, includes services furnished in an SNF (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 HMOs and competitive medical plans, physician assistants in rural health manpower shortage areas, clinical psychologists in rural health clinics and community mental health centers, and certified nurse midwives.

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

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

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

Beginning in 1991, Medicare pays 50 percent of the cost of outpatient prescription drugs above \$600. When fully implemented in 1993, Medicare will pay 80 percent of prescription drug costs above a deductible that assumes that 16.8 percent of Part B enrollees will exceed the deductible.

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

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

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

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

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

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

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

1993. Includes coverage of oral, self-administered anti-cancer 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 SNF 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 an SNF 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 fewer than 8. (The secretary will specify the increase for each of these years.) (See 1993.)

The annual payment limits of \$1,500 per beneficiary for outpatient physical therapy services and outpatient occupational therapy services, each, for services furnished by independent practitioners (that is, not by a hospital outpatient department) are suspended for 2000 and 2001. (See 1997.)

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

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

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

Coverage is provided for medical nutrition therapy services under certain circumstances for

beneficiaries who have diabetes or a renal disease, effective January 1, 2002.

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

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

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

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

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

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

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

Diabetes screening tests, including a fasting plasma glucose test and other such tests determined appropriate by the secretary of Health and Human Services, are covered for beneficiaries at

risk for diabetes, beginning January 1, 2005, under frequency standards to be established (but not to exceed two times per year).

2005. The colorectal screening benefit (see 1997 and 2000) is exempt from the Part B deductible, effective January 2007.

Exceptions to the financial limits on therapy services not provided by a hospital outpatient department are allowed for services furnished in 2006, if such services are determined to be medically necessary. (See 1997, 1999, and 2000.)

2006. Exceptions to the financial limits on nonhospital therapy services when deemed medically appropriate are extended through December 31, 2007. (See 2005.)

2007. Exceptions to the financial limits on nonhospital therapy services when deemed medically appropriate are extended through July 1, 2008. (See 2005 and 2006).

2008. For outpatient mental health services, the percentage of approved charges for which the beneficiary is liable phases down from 50 percent to 20 percent, over the 5-year period 2010–2014.

For the one-time, initial preventive examination (see 2003), the Part B deductible is waived, the eligibility period is extended from 6 months to 1 year after enrollment in Part B, measurement of body mass index is covered, and, upon agreement with the beneficiary, end-of-life planning is covered. Effective January 1, 2009.

Exceptions to the financial limits on nonhospital therapy services when deemed medically appropriate are extended through December 31, 2009. (See 2005, 2006, and 2007.)

2009. Exceptions to the financial limits on nonhospital therapy services when deemed medically appropriate are extended through March 31, 2010. (See 2005, 2006, 2007, and 2008.)

2010. An annual wellness visit to develop or update a personalized prevention plan is covered, with no beneficiary cost sharing, effective January 1, 2011.

Beneficiary cost sharing is eliminated for preventive services recommended with a grade of A or B by the U.S. Preventive Services Task Force, and the Part B deductible is waived for colorectal cancer screening tests, both effective January 1, 2011.

Exceptions to the financial limits on nonhospital therapy services when deemed medically appropriate are extended through December 31, 2011. (See 2005, 2006, 2007, 2008, and 2009.)

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

1996. The Medicare Integrity Program (MIP) is created, providing dedicated funds to identify and combat improper payments, including those caused by fraud and abuse, and, for the first time, allowing for contracts to be awarded competitively to entities other than carriers and intermediaries to conduct these activities.

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

2007. Group health plans are required to provide information identifying situations in which the plan is, or has been, primary to Medicare, effective January 2009. Effective June 2009, liability insurance, no-fault insurance, and workers’ compensation plans must submit specific information to enable appropriate determinations concerning coordination of benefits and any applicable recovery claims.

Under Part D

2003. Under temporary Medicare-endorsed prescription drug discount card program, for eligible beneficiaries voluntarily enrolling and paying up to \$30 annually, discounts on certain prescription drugs, as specified by card sponsors. Under Transitional Assistance provision, eligible beneficiaries whose incomes do not exceed 135 percent of the federal poverty level and do not have third-party prescription drug

coverage are eligible for (1) financial assistance of up to \$600 per year for purchasing prescription drugs and (2) a subsidized enrollment fee under the temporary Medicare-endorsed prescription drug discount card program. Enrollment begins in May 2004, access to discounts begins in June 2004, and program phases out as drug benefit becomes available in 2006 (see next entry).

Beginning January 1, 2006, upon voluntary enrollment in either a stand-alone PDP or an integrated Medicare Advantage plan that offers Part D coverage in its benefit, subsidized prescription drug coverage. Most FDA-approved drugs and biologicals are covered. However, plans may set up formularies for their drug coverage, subject to certain statutory standards. (Drugs currently covered in Parts A and B remain covered there.) Part D coverage can consist of either standard coverage or an alternative design that provides the same actuarial value. (For an additional premium, plans may also offer supplemental coverage exceeding the value of basic coverage.) Standard Part D coverage is defined for 2006 as having a \$250 deductible, with 25 percent coinsurance (or other actuarially equivalent amounts) for drug costs above the deductible and below the initial coverage limit of \$2,250. The beneficiary is then responsible for all costs until the \$3,600 out-of-pocket limit (which is equivalent to total drug costs of \$5,100) is reached. For higher costs, there is catastrophic coverage; it requires enrollees to pay the greater of 5 percent coinsurance or a small copay (\$2 for generic or preferred multisource brand and \$5 for other drugs). After 2006, these benefit parameters are indexed to the growth in per capita Part D spending (see Table 2. C1). In determining out-of-pocket costs, only those amounts actually paid by the enrollee or another individual (and not reimbursed through insurance) are counted; the exception is cost-sharing assistance from Medicare’s low-income subsidies (certain beneficiaries with low incomes and modest assets will be eligible for certain subsidies that eliminate or reduce their Part D premiums, cost-sharing, or both) and from State Pharmacy Assistance Programs. A beneficiary premium, representing 25.5 percent of the cost of basic coverage on average, is required (except for certain low-income beneficiaries, as previously mentioned, who may pay a reduced or no premium). For PDPs and the drug portion of Medicare Advantage plans, the premium will be determined by a bid process; each plan’s premium will be 25.5 percent of the national weighted average plus or minus the difference between the plan’s bid and the average. To help them gain experience with the Medicare population, plans will be protected by a system of risk corridors, which allow Part D

to assist with unexpected costs and to share in unexpected savings; after 2007, the risk corridors became less protective. To encourage employer and union plans to continue prescription drug coverage to Medicare retirees, subsidies to these plans are authorized; the plan must meet or exceed the value of standard Part D coverage, and the subsidy pays 28 percent of the allowable costs associated with enrollee prescription drug costs between a specified cost threshold (\$250 in 2006, indexed thereafter) and a specified cost limit (\$5,000 in 2006, indexed thereafter).

2008. Part D plans are required to include two classes of drugs in their formularies: (1) benzodiazepines and (2) for the treatment of epilepsy, cancer, or chronic mental disorder, barbiturates. Effective January 1, 2013.

2010. Beneficiaries who enter the coverage gap in 2010 receive a \$250 rebate and, starting in 2011, beneficiaries receive a 50-percent discount on covered brand-name prescription drugs. (The dollar value of this discount counts toward out-of-pocket spending, even though the beneficiary does not pay it.) Additionally, reductions in beneficiary cost sharing for both brand-name and generic drugs during the coverage gap are to be phased in beginning in 2011, such that by 2020, the coverage gap will be closed, and beneficiaries will be responsible for 25 percent of their prescription drug costs.

Retiree drug subsidies paid to employers and unions that provide continued prescription drug coverage to Medicare retirees (and meet specific criteria in doing so) are taxable beginning in 2013.

Medicare Financing

Hospital Insurance Taxes

See Table 2.A3.

2010. Beginning in 2013, an additional Part A payroll tax of 0.9 percent is collected on earned income exceeding \$200,000 (for those filing income tax singly) and \$250,000 (for those filing jointly). The earnings thresholds are not indexed.

Appropriations from General Revenues

1965. For HI costs attributable to transitionally insured beneficiaries.

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

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

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

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

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

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

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

Beginning January 2007, for Part B beneficiaries meeting certain income thresholds and thus paying income-related adjustment amounts in addition to their standard Part B premiums (see “Medicare Financing, Participant Premiums, 2003”), the per capita general revenue appropriations to Part B (see 1965 and 1972) are supposed to be reduced accordingly.

2010. Beginning January 2011, for Part D beneficiaries meeting certain income thresholds and thus paying income-related adjustment amounts in addition to their Part D premiums (see “Medicare Financing, Participant Premiums, 2010”), the per capita general revenue appropriations to Part D (see 2003) are supposed to be reduced accordingly.

Participant Premiums

See Table 2.C1.

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

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

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

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

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

For calculating the amount of Part B premium surcharge for individuals aged 65–70 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 was delayed 1 year, the penalty would be assessed for 2 years. Individuals in this category and already enrolled will have the length of time the higher premium was paid credited to them.

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

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

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

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

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

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

2003. Beginning January 2007, the Part B premium is increased for beneficiaries meeting certain income thresholds. (Beneficiaries with modified adjusted gross incomes under \$80,000 will continue to pay premiums that are 25 percent of twice the actuarial rate. *Actuarial rate* is defined as one-half of the Part B expected monthly cost per enrollee. For beneficiaries with incomes greater than \$80,000 and less than or equal to \$100,000, the applicable percentage is 35 percent; for those with incomes greater than \$100,000 and less than or equal to \$150,000, the percentage is 50 percent; for incomes greater than \$150,000 and less than or equal to \$200,000, the percentage is 65 percent; and for incomes greater than \$200,000, the percentage is 80 percent. For married couples who file joint tax returns, the income thresholds are doubled. For beneficiaries who are married and lived with their spouses at any time during the taxable year but who file separate tax returns from their spouses, with incomes greater than \$80,000 and less than or equal to \$120,000, the percentage is 65 percent; with incomes greater than \$120,000, the percentage is 80 percent. These thresholds are to be updated each calendar year by the Consumer Price Index (CPI). There is a 5-year adjustment period for this provision as well; that is, the amount of premium above 25 percent of twice the actuarial rate is phased in—at 20, 40, 60, 80, and 100 percent for 2007 to 2011 and later, respectively.)

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

For Part D, beginning in January 2006, a beneficiary premium, representing 25.5 percent of the cost of basic coverage on average, is required (except for certain low-income beneficiaries who may pay a reduced or no premium). For PDPs and the drug portion of Medicare Advantage plans, the premium will be determined by a bid process; each plan's premium will be 25.5 percent of the national weighted average plus or minus the difference between the plan's bid and the average. A late enrollment penalty

will apply for certain beneficiaries who fail to enroll at the first opportunity and who do not maintain creditable coverage elsewhere (external prescription drug coverage, such as through a retiree group health plan that meets or exceeds the actuarial value of standard Part D coverage).

2005. The phase-in of the income-related Part B premium (see 2003) is shortened from 5 years to 3 years, beginning January 1, 2007. (That is, the amount of premium above 25 percent of twice the actuarial rate is phased in at 1/3 for 2007, 2/3 for 2008, and 3/3 for 2009 and later.)

For beneficiaries who are volunteering outside the United States through a 12-month or longer program sponsored by a tax-exempt organization and who have other health insurance, the late enrollment penalties imposed on beneficiaries who do not enroll in Part B upon becoming eligible for Medicare are waived, effective January 2007, and a special enrollment period for these beneficiaries is established.

2008. The policy waiving the late enrollment penalty for Part D enrollees who meet certain low-income and limited-resources requirements is codified into statute. (The policy was in effect through 2008 and the law is effective beginning January 1, 2009.)

2010. The income thresholds used to calculate Part B income-related premiums are frozen at 2010 levels for 2011 through 2019.

Beginning in January 2011, Part D enrollees whose income exceeds certain thresholds are required to pay higher Part D premiums. The income thresholds and premium adjustments are to be set in the same manner as those under Part B (including the use of frozen thresholds in 2011–2019).

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 as of November 1, 2011. They should be used only as overviews and general guides to the Medicare and Medicaid programs. The views expressed herein do not necessarily reflect the policies or legal positions of the Centers for Medicare & Medicaid Services (CMS) or the Department of Health and Human Services (HHS). These summaries do not render any legal, accounting, or other professional advice, nor are they intended to explain fully all of the provisions or exclusions of the relevant laws, regulations, and rulings of the Medicare and Medicaid programs. Original sources of authority should be researched and utilized.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 establishes its own eligibility standards; determines the type, amount, duration, and scope of services; sets the rate of payment for services; and administers its own program. Medicaid policies for eligibility, services, and payment are complex and vary considerably, even among states of similar size or geographic proximity. Thus, a person who is eligible for Medicaid in one state may not be eligible in another state, and the services provided by one state may differ considerably in amount, duration, or scope from services provided in a similar or neighboring state. In addition, state legislatures may change Medicaid eligibility, services, and/or reimbursement at any time.

Title XXI of the Social Security Act, the Children's Health Insurance Program (CHIP, known from its inception until March 2009 as the State Children's Health Insurance Program, or SCHIP), is a program initiated by the Balanced Budget Act (BBA) of 1997 (Public Law

105-33). The BBA provided \$40 billion in federal funding through fiscal year 2007 to furnish health care coverage for low-income children—generally those in households with income below 200 percent of the federal poverty level (FPL)—who did not qualify for Medicaid and would otherwise be uninsured. Subsequent legislation, including the Children's Health Insurance Program Reauthorization Act (CHIPRA) of 2009 (Public Law 111-3) and the Patient Protection and Affordable Care Act (Public Law 111-148) as amended by the Health Care and Education Reconciliation Act of 2010 (Public Law 111-152)—collectively referred to as the Affordable Care Act—extended CHIP funding through fiscal year 2015. Under CHIP, states may elect to provide coverage to qualifying children by expanding their Medicaid programs or through a state program separate from Medicaid. A number of states have also been granted waivers to cover parents of children enrolled in CHIP.

Medicaid Eligibility

Until 2014, when the Affordable Care Act will expand Medicaid eligibility, Medicaid does not provide medical assistance for all poor persons. Under the broadest provisions of the federal statute, Medicaid does not currently 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 most of those within these groups; their financial resources also are tested against threshold levels (as determined by each state within federal guidelines).

States generally have broad discretion in determining which groups their Medicaid programs will cover and the financial criteria for Medicaid eligibility. To be eligible for federal funds, however, states are required to provide Medicaid coverage for certain individuals who receive federally assisted income-maintenance payments, as well as for related groups not receiving cash payments. In addition to their Medicaid programs, most states have additional "state-only" programs to provide medical assistance for specified poor persons who do not qualify for Medicaid. Federal funds are not provided for state-only programs. The following enumerates the mandatory Medicaid "categorically needy" eligibility groups for which federal matching funds are provided:

- Limited-income families with children, as described in section 1931 of the Social Security Act, are generally eligible for Medicaid if they meet the requirements for the Aid to Families with Dependent Children (AFDC) program that were in effect in their state on July 16, 1996.

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

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- Children under age 6 whose family income is at or below 133 percent of the FPL. (As of January 2011, the FPL has been set at \$22,350 for a family of four in the continental U.S.; Alaska and Hawaii's FPLs are \$27,940 and \$25,710, respectively.)
 - 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.)
 - Infants born to Medicaid-eligible women, for the first year of life with certain restrictions.
 - Supplemental Security Income (SSI) recipients in most states (or aged, blind, and disabled individuals in states using more restrictive Medicaid eligibility requirements that pre-date SSI).
 - Recipients of adoption or foster care assistance under Title IV-E of the Social Security Act.
 - Special protected groups (typically individuals who lose their cash assistance under Title IV-A or SSI because of earnings from work or from increased Social Security benefits, but who may keep Medicaid for a period of time).
 - All children under age 19, in families with incomes at or below the FPL.
 - Certain Medicare beneficiaries (described later).

States also have the option of providing Medicaid coverage for other "categorically related" groups. These optional groups share characteristics of the mandatory groups (that is, they fall within defined categories), but the eligibility criteria are somewhat more liberally defined. The broadest optional groups for which states can 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, and individuals in home and community-based waiver programs, who are eligible under a "special income level." (The amount is set by each state—up to 300 percent of the SSI federal benefit rate.)
- Individuals who would be eligible if institutionalized, but who are receiving care under home and community-based services waivers.

- Certain aged, blind, or disabled adults who have incomes above those requiring mandatory coverage, but below the FPL.
- Aged, blind, or disabled recipients of state supplementary income payments.
- Certain working-and-disabled persons with family income less than 250 percent of the FPL who would qualify for SSI if they did not work.
- Tuberculosis-infected persons who would be financially eligible for Medicaid at the SSI income level if they were in a Medicaid-covered category. (Coverage is limited to tuberculosis-related ambulatory services and tuberculosis drugs.)
- Certain uninsured or low-income women who are screened for breast or cervical cancer through a program administered by the Centers for Disease Control 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 in the CHIP (formerly SCHIP) program established by the BBA.
- "Medically needy" persons (described below).

The medically needy (MN) option allows states to extend Medicaid eligibility to additional persons. These persons would be eligible for Medicaid under one of the mandatory or optional groups, except that their income and/or resources are above the eligibility level set by their state for those groups. Persons may qualify immediately or may "spend down" by incurring medical expenses greater than the amount by which their income exceeds 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 an MN program, there are federal requirements that certain groups and certain services must be included; for example, 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 as part of its MN program. As of 2009, 33 states plus the District of Columbia have elected to have an MN program and are providing 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 affected 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 these restrictions regarding SSI coverage, Medicaid benefits can continue only if these persons can be covered under some other eligibility status (again with the exception of emergency services, which are mandatory). Public Law 104-193 also affected a number of disabled children, who lost SSI as a result of the restrictive changes; however, their eligibility for Medicaid was reinstated by Public Law 105-33, the BBA.

In addition, welfare reform repealed the open-ended federal entitlement program known as Aid to Families with Dependent Children (AFDC) and replaced it with Temporary Assistance for Needy Families (TANF), which provides states with grants to be spent on time-limited cash assistance. TANF generally limits a family’s lifetime cash welfare benefits to a maximum of 5 years and permits states to impose a wide range of other requirements as well—in particular, those related to employment. However, the impact on Medicaid eligibility has not been significant. Under welfare reform, persons who would have been eligible for AFDC under the AFDC requirements in effect on July 16, 1996 are generally still eligible for Medicaid. Although most persons covered by TANF receive Medicaid, it is not required by law.

Medicaid coverage may begin as early as the third month prior to application—if the person would have been eligible for Medicaid had he or she applied during that time. Medicaid coverage generally stops at the end of the month in which a person no longer meets the criteria of any Medicaid eligibility group. The BBA allows states to provide 12 months of continuous Medicaid coverage (without reevaluation) for eligible children under age 19.

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

The Deficit Reduction Act (DRA) of 2005 (Public Law 109-171) refined eligibility requirements for Medicaid beneficiaries by tightening standards for citizenship and immigration documentation and by changing the rules concerning long-term care eligibility—specifically, the look-back period for determining community spouse income and assets was lengthened from 36 months to 60 months, individuals whose homes exceed \$500,000 in value are disqualified, and the states are required to impose partial months of ineligibility.

Beginning in 2014, the Affordable Care Act will expand Medicaid eligibility to include all individuals under age 65 in families with income below 138 percent of the FPL. (Technically, the income limit is 133 percent of the FPL, but the Act also provides for a 5-percent income disregard.) In addition to the higher level of allowable income, the new legislation expands eligibility to people under age 65 who have no other qualifying factors that would have made them eligible for Medicaid under prior law, such as being under age 18, disabled, pregnant, or parents of eligible children. Because individuals are not required to be parents of eligible children under the new law, nondisabled nonaged adults comprise the category expected to have the greatest increase in Medicaid enrollment. The Affordable Care Act also broadens availability of long-term care services and supports, starting, in some instances, as early as 2010.

Scope of Medicaid Services

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

- Inpatient hospital services;
- Outpatient hospital services;
- Pregnancy-related services, including prenatal care and 60 days postpartum pregnancy-related services;
- Vaccines for children;
- Physician services;
- Nursing facility services for persons aged 21 or older;
- Family planning services and supplies;
- Rural health clinic services;
- Home health care for persons eligible for skilled nursing services;
- Laboratory and x-ray services;
- Pediatric and family nurse practitioner services;

- Nurse-midwife services;
- Federally qualified health center (FQHC) services, and ambulatory services of an FQHC that would be available in other settings; and
- Early and periodic screening, diagnostic, and treatment (EPSDT) services for children under age 21.

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

- Diagnostic services;
- Clinic services;
- Intermediate care facility services;
- Prescribed drugs and prosthetic devices;
- Optometrist services and eyeglasses;
- Nursing facility services for children under age 21;
- Transportation services;
- Rehabilitation and physical therapy services;
- Hospice care;
- Home and community-based care to certain persons with chronic impairments; and
- Targeted case management services.

The BBA included a state option known as Programs of All-inclusive Care for the Elderly (PACE). PACE provides an alternative to institutional care for persons aged 55 and older who require a nursing-facility level of care. The PACE team offers and manages all health, medical, and social services and mobilizes other services as needed to provide preventive, rehabilitative, curative, and supportive care. This care, provided in day health centers, homes, hospitals, and nursing homes, helps the person maintain independence, dignity, and quality of life. PACE functions within the Medicare program as well. Regardless of source of payment, PACE providers receive payment only through the PACE agreement and must make available all items and services covered under both Titles XVIII and XIX, without amount, duration, or scope limitations and without application of any deductibles, copayments, or other cost sharing. The individuals enrolled in PACE receive benefits solely through the PACE program.

Amount and Duration of Medicaid Services

Within broad federal guidelines and certain limitations, states determine the amount and duration of services offered under their Medicaid programs. States may limit,

for example, the number of days of hospital care or the number of physician visits covered. Two restrictions apply: (1) limits must result in a sufficient level of services to reasonably achieve the purpose of the benefits, and (2) limits on benefits may not discriminate among beneficiaries based on medical diagnosis or condition.

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

Payment for Medicaid Services

Medicaid operates as a vendor payment program. States may pay health care providers directly on a fee-for-service basis, or states may pay for Medicaid services through various prepayment arrangements, such as health maintenance organizations (HMOs). Within federally imposed upper limits and specific restrictions, each state for the most part has broad discretion in determining the payment methodology and payment rate for services. Generally, payment rates must be sufficient to enlist enough providers so that covered services are available at least to the extent that comparable care and services are available to the general population within that geographic area. Providers participating in Medicaid must accept Medicaid payment rates as payment in full. States must make additional payments to qualified hospitals that provide inpatient services to a disproportionate number of Medicaid beneficiaries and/or to other low-income or uninsured persons under what is known as the "disproportionate share hospital" (DSH) adjustment. From 1988 to 1991, excessive and inappropriate use of the DSH adjustment resulted in rapidly increasing federal expenditures for Medicaid. Legislation passed in 1991 and 1993, and amended in the BBA of 1997 and later legislation, capped the federal share of payments to DSH hospitals.

States may impose nominal deductibles, coinsurance, or copayments on some Medicaid beneficiaries for certain services. The following Medicaid beneficiaries, however, must be excluded from cost sharing: pregnant women, children under age 18, and hospital or nursing home patients who are expected to contribute most of their income to institutional care. In addition, all Medicaid beneficiaries must be exempt from copayments for emergency services and family planning services. Under the DRA, new cost sharing and benefit rules provided states the option of imposing new premiums and increased cost sharing on all Medicaid beneficiaries except for those mentioned above and for terminally ill patients in hospice care. The DRA also established special rules for cost sharing for prescription drugs and for nonemergency services furnished in emergency rooms.

The federal government pays a share of the medical assistance expenditures under each state's Medicaid program. That share, known as the Federal Medical Assistance Percentage (FMAP), is determined annually by a formula that compares the state's average per capita 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 2011, the FMAPs varied from 50 percent in 13 states and the territories to 74.7 percent in Mississippi and averaged 59.0 percent overall. The BBA permanently raised the FMAP for the District of Columbia from 50 percent to 70 percent. For children covered through the CHIP program, the federal government pays states a higher share, or "enhanced" FMAP, which averaged 71.3 percent in fiscal year 2011.

The American Recovery and Reinvestment Act (ARRA) of 2009 (Public Law 111-5) provided states with an increase in their Medicaid FMAPs of up to 14 percentage points, depending on state unemployment rates, for the first quarter of fiscal year 2009 through the first quarter of fiscal year 2011. Section 201 of Public Law 111-226 (referred to as the Education, Jobs, and Medicaid Assistance Act of 2010) extended these increases for the second and third quarters of fiscal year 2011, but at lower levels than those under ARRA.

The federal government also reimburses states for 100 percent of the cost of services provided to American Indians and Alaska Natives through facilities of the Indian Health Service, for 100 percent of the cost of the Qualifying Individuals (QI) program (described later), and for 90 percent of the cost of family planning services, and shares in each state's expenditures for the administration of the Medicaid program. Most administrative costs are matched at 50 percent, although higher percentages are paid for certain activities and functions, such as development of mechanized claims processing systems.

Except for the CHIP program, the QI program, DSH payments, and payments to territories, federal payments to states for medical assistance have no set limit (cap). Rather, the federal government matches (at FMAP rates) state expenditures for the mandatory services, as well as for the optional services that the individual state decides to cover for eligible beneficiaries, and matches (at the appropriate administrative rate) all necessary and proper administrative costs.

Summary and Trends

Medicaid was initially formulated as a medical care extension of federally funded programs providing cash income assistance for the poor, with an emphasis on dependent children and their mothers, the disabled, and the elderly. Over the years, however, Medicaid eligibility has been incrementally expanded beyond its original ties with eligibility for cash programs. Legislation in the late 1980s extended Medicaid coverage to a larger number of low-income pregnant women and poor children and to some Medicare beneficiaries who are not eligible for any cash assistance program. Legislative changes also focused on increased access, better quality of care, specific benefits, enhanced outreach programs, and fewer limits on services.

In most years since its inception, Medicaid has had very rapid growth in expenditures. This rapid growth has been due primarily to the following factors:

- The increase in size of the Medicaid-covered populations as a result of federal mandates, increased state coverage of optional groups, general population growth, and economic recessions;
- The expanded coverage and utilization of services;
- The DSH payment program, coupled with its inappropriate use to increase federal payments to states;
- The increase in the number of very old and disabled persons requiring extensive acute and/or long-term health care and various related services;
- The results of technological advances to keep a greater number of very low birth-weight babies and other critically ill or severely injured persons alive and in need of continued extensive and very costly care;
- The increase in drug costs and the availability of new expensive drugs; and
- The increase in payment rates to providers of health care services, when compared with general inflation.

As with all health insurance programs, most Medicaid beneficiaries incur relatively small average expenditures per person each year, and a relatively small proportion

incurs very large costs. Moreover, the average cost varies substantially by type of beneficiary. National data for 2008, for example, indicate that Medicaid payments for services for 22.8 million children, who constituted 49 percent of all Medicaid beneficiaries, averaged \$2,643 per child. Similarly, for 10.6 million nondisabled adults, who represented 23 percent of beneficiaries, payments averaged \$3,968 per person. However, other groups had much larger per-person expenditures. Medicaid payments for services for 4.6 million aged, who constituted 10 percent of all Medicaid beneficiaries, averaged \$15,869 per person; for 8.8 million disabled, who represented 19 percent of beneficiaries, payments averaged \$15,749 per person. When expenditures for these high- and lower-cost beneficiaries are combined, the 2008 payments to health care vendors for 46.7 million Medicaid beneficiaries averaged \$6,702 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 nearly 41 percent of the total cost of nursing facility care in 2008. National data for 2008 show that Medicaid payments for nursing facility services (excluding intermediate care facilities) totaled \$47.7 billion for more than 1.6 million beneficiaries of these services—an average expenditure of \$29,533 per nursing home beneficiary. The national data also show that Medicaid payments for home health services totaled \$6.6 billion for 1.1 million beneficiaries—an average expenditure of \$5,789 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 experimental statewide health care reform demonstrations to cover uninsured populations and to test new delivery systems without increasing costs. Finally, the BBA provided states a new option to use managed care without a waiver. According to the *Medicaid Managed*

Care Enrollment Report, the share of Medicaid beneficiaries enrolled in some form of managed care program grew steadily from 47.8 percent of enrollees in 1997 to 71.5 percent in 2010.

In fiscal year 2010, net outlays for the Medicaid program (federal and state) were \$404.1 billion, including direct payment to providers of \$255.7 billion, payments for various premiums (for HMOs, Medicare, etc.) of \$103.9 billion, payments to disproportionate share hospitals of \$15.2 billion, administrative costs of \$18.1 billion, and various adjustments totaling \$7.4 billion. In addition, there were \$3.8 billion in expenditures for the Vaccines for Children Program under Title XIX. With no other changes to the Medicaid program except for those already prescribed by current law (including the Affordable Care Act), spending is projected to reach \$677.3 billion by fiscal year 2016.

Expenditures under the CHIP program in fiscal year 2010 were \$11.4 billion. CHIP is currently funded only through fiscal year 2015.

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. These additional services may include, for example, nursing facility care beyond the 100-day limit covered by Medicare, eyeglasses, and hearing aids. For persons enrolled in both programs, any services that are covered by Medicare are paid for by the Medicare program before any payments are made by the Medicaid program, since Medicaid is always the "payer of last resort."

Certain other Medicare beneficiaries may receive help with Medicare premium and cost-sharing payments through their state Medicaid program. Qualified Medicare Beneficiaries (QMBs) and Specified Low-Income Medicare Beneficiaries (SLMBs) are the best-known categories and the largest in numbers. QMBs are those Medicare beneficiaries who have financial resources at or below twice the standard allowed under the SSI program and incomes at or below 100 percent of the FPL. For QMBs, Medicaid pays the Hospital Insurance (HI, or Part A) and Supplementary Medical Insurance (SMI) 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 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 coverage. If these persons have incomes below 200 percent of the FPL but do not meet any other Medicaid assistance category, they may qualify to have Medicaid pay their Part A premiums as Qualified Disabled and Working Individuals (QDWIs).

For Medicare beneficiaries with incomes above 120 percent and less than 135 percent of the FPL, states receive a capped allotment of federal funds for payment of Medicare Part B premiums. These beneficiaries are known as Qualifying Individuals (QIs). Unlike the QMBs and SLMBs, who may be eligible for other Medicaid benefits in addition to their QMB/SLMB benefits, the QIs cannot be otherwise eligible for medical assistance under a state plan. The QI benefit is 100 percent federally funded, up to the state's allotment. The QI program was established by the BBA for fiscal years 1998 through 2002 and has been extended numerous times. The most recent extension continues the program through February 2012.

The Centers for Medicare & Medicaid Services (CMS) estimates that, in 2010, Medicaid provided some level of supplemental health coverage for 9.1 million Medicare beneficiaries.

In January 2006, a new Medicare prescription drug benefit began that provides drug coverage for Medicare beneficiaries, including those who also receive coverage from Medicaid. In addition, under this benefit, individuals eligible for both Medicare and Medicaid receive a low-income subsidy for the Medicare drug plan premium and assistance with cost sharing for prescriptions. Medicaid no longer provides drug benefits for Medicare beneficiaries.

Since the Medicare drug benefit and low-income subsidy replace a portion of state Medicaid expenditures for drugs, states will see a reduction in Medicaid expenditures. To offset this reduction, the Medicare Prescription Drug, Improvement, and Modernization Act (MMA) of 2003 (Public Law 108-173) requires each state to make a monthly payment to Medicare representing a percentage of the projected reduction. For 2006, this payment was 90 percent of the projected 2006 reduction in state spending. The percentage has decreased by 1 2/3 percent per year since 2006 and will continue decreasing to 75 percent for 2015 and beyond.

Note: Medicaid data are based on the projections of the Mid-Session Review of the President's Fiscal Year 2012 Budget and are consistent with data received from the states through the Medicaid Statistical Information System (MSIS) and forms CMS-37 and CMS-64. Medicaid managed care enrollment data are from the *Medicaid Managed Care Enrollment Report*, available at https://www.cms.gov/MedicaidDataSourcesGenInfo/04_MdManCrEnrllRep.asp.

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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 U.S. Virgin Islands are covered under unemployment insurance programs.

To induce states to enact unemployment insurance laws, the Social Security Act of 1935 provided a tax offset incentive. A uniform national tax was imposed on payrolls of industrial and commercial employers who employed eight or more workers in 20 or more weeks in a calendar year. Employers who paid taxes to a state with an approved unemployment insurance law could credit (offset) up to 90 percent of the state tax against the federal tax. This ensured that employers in states without an unemployment insurance law would not have an advantage competing with similar businesses in states with such a law because they would still be subject to the federal payroll tax, and their employees would not be eligible for benefits.

In addition, the Social Security Act authorized grants to states to meet the costs of administering the state systems. By July 1937, all 48 states, the then territories of Alaska and Hawaii, and the District of Columbia had passed unemployment insurance laws. Later, Puerto Rico adopted its own program, which was incorporated in 1961 into the federal-state system. A similar program for workers in the U.S. 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.

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

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 was 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 of securing federal approval of the state law. Under this form of coverage, local government and nonprofit employers have the option of making contributions or of reimbursing the state for actual benefit expenditures. 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 or 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 federal civilian employees, ex-servicemembers, and workers whose employers contribute to or make payments in lieu of contributions to state unemployment funds are eligible if they are involuntarily unemployed, able to work, available for work, and actively seeking work. Workers must also meet any other 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. Under certain circumstances, many states now also allow an alternative base period, which is generally the most recent 4 completed calendar quarters.

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. Some states replace approximately 50 percent, subject to specified dollar maximums.

A considerable majority of state laws use a formula that computes weekly benefits as a fraction of wages in one or more quarters of the base period. Most commonly, the fraction is taken of wages in the quarter during which wages were highest, because this quarter most nearly reflects full-time work. In most of these states, the same fraction is used at all benefit levels. The other state 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 higher than the ceiling. The maximum may be either a fixed dollar amount or a flexible amount. Under the latter arrangement, which has been adopted in 36 jurisdictions, the maximum is adjusted automatically in accordance with the weekly wages of covered employees.

Fourteen states provide additional allowances for certain dependents. They all include children under the ages of 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 \$30 or less per week, and, in the majority of states, the amount is the same for each dependent.

All but 12 states require a waiting period of 1 week of total unemployment before benefits can begin. Five states have provisions making the waiting period compensable after a specified period.

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

Extended Benefits

In 1970, 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 (Public Law 102-318) provided states with the option of adopting an additional formula for triggering the permanent Extended Benefits program. Effective March 1993, states had the option of amending their laws to use alternative total unemployment rate triggers, in addition to the current insured unemployment rate triggers. Under this option, Extended Benefits would be paid when (1) the state's seasonally adjusted total unemployment rate for the most recent 3 months is at least 6.5 percent and (2) that rate is at least 110 percent of the state average total unemployment rate in the corresponding 3-month period in either of the 2 preceding years.

States triggering on to the Extended Benefits program under other triggers would provide the regular 26 weeks of unemployment benefits in addition to 13 weeks of Extended Benefits (which is the same number of weeks of benefits provided previously). In addition, states that have chosen the total unemployment rate option will also amend their state laws to add an additional 7 weeks of Extended Benefits (for a total of 20 weeks) when the total unemployment rate is at least 8 percent and is 110 percent of the state's total unemployment rate for the same 3 months in either of the 2 preceding years. As of December 31, 2010, Extended Benefits were not payable in 17 states.

In addition to the permanent Extended Benefits program, Congress from time to time enacts temporary extensions of unemployment compensation benefits. The most recent example is Emergency Unemployment Compensation (EUC08). The EUC08 program was created on June 30, 2008, by the Supplemental Appropriations Act of 2008 (Public Law 110-252). It made up to 13 additional weeks of federally funded unemployment benefits available to unemployed individuals nationwide who had already collected all regular state benefits for which they were eligible and who met other eligibility requirements.

On November 21, 2008, the Unemployment Compensation Extension Act of 2008 (Public Law 110-449) expanded EUC08 to up to 20 weeks in every state and up to 13 additional weeks for individuals in "high unemployment" states. On November 6, 2009, the Worker, Homeownership, and Business Assistance Act of 2009 (Public Law 111-92) expanded EUC08 to up to 34 weeks in every state and up to 19 additional weeks for individuals in "high unemployment" states.

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Workers' Compensation

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

The federal government was the first to establish a workers' compensation program, covering its civilian employees with an act that was passed in 1908 to provide benefits for workers engaged in hazardous work. The remaining federal workforce was covered in 1916. Nine states enacted workers' compensation laws in 1911. By 1921, all but 6 states and the District of Columbia had workers' compensation laws.

Today each of the 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands have their own program. The federal government covers its employees through its own program. It also administers the Longshore and Harbor Workers' Compensation Act, enacted in 1927, which covers longshore and harbor workers throughout the United States.

Coal miners suffering from pneumoconiosis, or "black lung" disease, are covered by the Black Lung Benefits Act of 1972, with the initial benefits enacted as part of the Coal Mine Health and Safety Act of 1969. Under this program, monthly cash benefits are payable to miners disabled by black lung disease and to their dependents or survivors. Medical benefits are also payable to the worker on the basis of a diagnosis of pneumoconiosis.

The Radiation Exposure Compensation Act of 1990 provides lump-sum compensation payments to individuals who contracted certain cancers and other serious diseases as a result of exposure to radiation released during above-ground nuclear weapons tests or during employment in underground uranium mines. The lump-sum payments are specified in law and range from \$50,000 to \$100,000.

The Energy Employees Occupational Illness Compensation Program provides lump-sum payments up to \$150,000 to civilian workers (or their survivors) who became ill as a result of exposure to radiation, beryllium, or silica in the production or testing of nuclear weapons. The program went into effect in July 2001. It also provides smaller lump-sum payments to individuals found eligible for an award under the Radiation Exposure

Compensation Act. Medical benefits are awarded for the treatment of covered conditions.

Coverage

In 2009, state and federal workers' compensation laws covered about 124.9 million employees. Covered payroll in 2009—that is, total wages paid to covered workers—was \$5.7 trillion.

Common exemptions from coverage are domestic service, agricultural employment, small employers, and casual labor. However, 39 programs have some coverage for agricultural workers, and 25 programs have some coverage for domestic workers.

Many programs exempt employees of nonprofit, charitable, or religious institutions. The coverage of state and local public employees differs widely from one state program to another.

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

Two groups outside the coverage of workers' compensation laws are railroad employees engaged in interstate commerce and seamen in the U.S. Merchant Marine. These workers have health insurance and short-term and long-term cash benefit plans that cover disabilities whether or not the conditions are work-related. In addition, under federal laws these workers retain the right to bring tort suits against their employers for negligence in the case of work-related injuries or illness.

Benefits

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

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

Temporary Total Disability

Most compensation cases that involve cash payments are for temporary total disability. In these cases, the worker is temporarily precluded from performing the pre-injury job or another job with the employer that the worker could have performed before the injury. When workers' lost time exceeds the waiting period (3 to 7 days, depending on the state), they receive a percentage of their weekly wages—typically two-thirds—up to a maximum weekly amount. The maximum is generally set at some percentage of the states' average weekly wage, ranging from 66 2/3 percent to 200 percent, but typically 100 percent.

Temporary Partial Disability

In some cases, workers return to work before they reach maximum medical improvement and have reduced responsibilities and a lower salary. In those cases, they receive temporary partial disability benefits.

Permanent Total Disability

If a worker has very significant impairments that are judged to be permanent after he or she reaches maximum medical improvement, the worker receives permanent total disability benefits. Very few workers' compensation cases are found to have permanent total disabilities.

Permanent Partial Disability

When the worker has impairments that, although permanent, do not completely limit the workers' ability to work, permanent partial disability benefits are paid. The system for determining benefits in these cases is complex and varies across jurisdictions. Some states provide benefits based on an impairment rating scheme. The level of impairment, often expressed as a percentage of total disability, is used to determine the benefit amount. Some states provide benefits on the basis of loss of earning capacity. They use impairment ratings with modifications based on vocational factors, such as the worker's education, job experience, and age. Other states use systems that attempt to compensate workers for actual lost wages.

Death Benefits

Generally, compensation is related to earnings and to the number of dependents eligible as the survivors of workers who die from a work-related illness or injury.

Medical Benefits

All workers' compensation acts require that medical aid be furnished without delay, to workers suffering from a work-related injury or illness, whether or not the condition entails work interruption. This care includes first-aid

treatment, physician services, surgical and hospital services, nursing, medications, medical supplies, appliances, and prosthetic devices. Care is typically provided with no copayment from the worker. A few state laws contain provisions for contributions by the covered employee for hospital and medical benefits.

Financing

Workers' compensation programs are financed almost exclusively by employers and are based on the principle that the cost of work-related accidents is a business expense. Depending on state laws, employers can purchase insurance from a private carrier or state fund, or they can self-insure. No program relies on general taxing power to finance workers' compensation. Employers in most programs are permitted to carry insurance against work accidents with commercial insurance companies or to qualify as self-insurers by giving proof of financial ability to carry their own risk. In five jurisdictions, commercial insurance is not allowed. In two of these areas, employers must insure with an exclusive state fund, and in three others, they must either insure with an exclusive state insurance fund or self-insure. In 21 jurisdictions, state funds have been established that compete with private insurance carriers. Federal employees are provided protection through a federally financed and operated system.

Program Highlights

Benefit payments under workers' compensation programs increased to \$58.3 billion in 2009, which was a 0.4 percent increase from the 2008 benefit figure of \$58.1 billion. When compared to covered wages, the benefits increased by five cents to \$1.03 per \$100 of covered wages.

In 2009, medical benefits accounted for \$28.9 billion, and wage loss compensation accounted for \$29.4 billion. The latter amount includes payments to disabled workers and the survivors of deceased workers.

The \$58.3 billion for workers' compensation benefit payments in 2009 includes \$481.0 million in benefits for the Black Lung program. This program is described separately (see Tables 9.D1–9.D2).

The employers' cost of providing workers' compensation coverage generally varies according to risk, industrial classification, and experience rating. Nationally in 2009, such costs were approximately \$1.30 per \$100 of covered wages, or about \$593 for each of the 124.9 million protected employees.

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Temporary Disability Insurance

Five states, Puerto Rico, and the railroad industry have social insurance programs that partially compensate for the loss of wages caused by temporary nonoccupational disability or maternity. Those programs are known as *temporary disability insurance* (TDI) because the duration of the payments is limited.

Federal law does not provide for a federal-state insurance system for short-term disability comparable to the federal-state system of unemployment insurance. However, in 1946 Congress amended the Federal Unemployment Tax Act (FUTA) to permit states where employees make contributions under the unemployment insurance program to use some or all of these contributions to pay disability benefits (but not administrative costs). Of the nine states that could have benefited from this provision for initial funding for TDI, three—California, New Jersey, and Rhode Island—took advantage. Rhode Island had already enacted the first state law in 1942. California and the railroad industry followed in 1946, then New Jersey in 1948, and New York in 1949. A two-decade hiatus followed before Puerto Rico and Hawaii passed laws in 1968 and 1969, respectively.

The temporary disability insurance laws of the five states and Puerto Rico cover most commercial and industrial wage and salary workers in private employment if the employer has at least one worker. In no state is coverage under TDI identical with that of the unemployment insurance program. Principal occupational groups excluded are domestic workers, family workers (parent, child, or spouse of the employer), government employees, and the self-employed. State and local government employees are included in Hawaii, and the other state programs generally provide elective coverage for some or all public employees.

Agricultural workers are covered to varying degrees in California, Hawaii, New Jersey, and Puerto Rico, but they are not covered in other jurisdictions. The California law permits self-employed individuals to elect coverage on a voluntary basis. Workers employed by railroads, railroad associations, and railroad unions are covered by TDI under the national system included in the Railroad Unemployment Insurance Act.

The methods used for providing this protection vary. In Rhode Island, the coverage is provided through an exclusive, state-operated fund into which all contributions are paid and from which all benefits are disbursed. In addition, covered employers may provide supplemental benefits in any manner they choose. The railroad program is also exclusively publicly operated in conjunction with its unemployment insurance provisions.

In California, New Jersey, and Puerto Rico, coverage is provided through a state-operated fund, but employers are permitted to “contract out” of the state fund by purchasing group insurance from commercial insurance companies, by self-insuring, or by negotiating an agreement with a union or employees’ association. Coverage by the state fund is automatic unless or until an employer or the employees take positive action by substituting a private plan that meets the standards prescribed in the law and is approved by the administering agency. Premiums (in lieu of contributions) are then paid directly to the private plan, and benefits are paid to the workers affected.

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

Eligibility for Benefits

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

Earnings or Employment Requirements

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

Disability Requirements

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

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

Disqualifying Income

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

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

In all seven TDI systems, as with unemployment insurance, weekly benefit amounts are related to a claimant's previous earnings in covered employment. In general, the benefit amount for a week is intended to replace at least one-half the weekly wage loss for a limited time. All the laws, however, specify minimum and maximum amounts payable for a week. The maximum duration of benefits varies from 26 weeks to 52 weeks. New York and Puerto Rico have a uniform duration of 26 weeks for all claimants; New Jersey and Hawaii have a variable duration of up to 26 weeks; Rhode Island has a variable duration of up to 30 weeks; and California and the railroad program have a variable duration of up to 52 weeks. Under the railroad program, duration of benefits varies from 26 weeks to 52 weeks, on the basis of the total number of years of employment in the industry. In the other jurisdictions, limited predisability "base period" wages reduce benefit duration. A noncompensable waiting period of a week or 7 consecutive days of disability (4 days for railroad workers) is generally required before the payment of benefits for subsequent weeks.

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

Financing and Administration

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

Five of the seven TDI programs are administered by the same agency that administers unemployment insurance. Under those 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. By contrast, the New York program is administered by the state Workers' Compensation Board, and the Hawaii program is administered by a separate division of the Department of Labor and Industrial Relations.

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 to supervising private plans, setting standards of performance, and 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 initially responsible for the payment and administration of all benefits.

The Black Lung Benefits Act of 1972 designated program operations related to claims filed through December 31, 1973 (with certain exceptions) as Part B, designated claims filed thereafter as Part C, established different financing provisions for Part C, and assigned jurisdiction for Part C to the Department of Labor (DOL).

On October 1, 1997, responsibility for maintenance and payment of Part B benefits was also transferred from SSA to DOL; SSA, however, maintained responsibility for conducting formal hearings to resolve contested issues regarding Part B claims. Data on all Part B claims are reported in this *Supplement*. Part C data are reported by DOL's Office of Workers' Compensation Programs (OWCP) in the *OWCP Annual Report to Congress*.

Legislation enacted November 2, 2002 (Public Law 107-275) permanently transferred the responsibility for all Black Lung claims (Parts B and C) to OWCP. SSA continues to handle only a small number of pending Part B appeals cases.

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.

Because Black Lung payments are tied directly to federal employee salary scales, increases are automatically payable when federal salaries are increased. Reflecting a 1.5 percent adjustment, monthly benefit rates effective January 1, 2010, are:

- Miner or widow, \$625.00
- Miner or widow and 1 dependent, \$938.00
- Miner or widow and 2 dependents, \$1,094.00
- Miner or widow and 3 or more dependents (family benefit), \$1,251.00

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

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

CONTACT: Bennett Stewart (606) 218-9236 or statistics@ssa.gov.

Veterans' Disability Benefits

The payment rates shown below took effect in December 2009. They remain current because no cost-of-living adjustments took effect in 2010.

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 as of 2009 range from \$123 a month for a 10 percent disability to \$2,673 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 Nonservice-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, at least one day of which was during a war period, 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 or older who meet service, net worth, and income requirements are eligible for a pension, regardless of current physical condition.

Effective December 1, 2009, maximum benefit amounts for nonservice-connected disabilities range from \$986 per month for a veteran without a dependent spouse or child to \$1,950 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 \$168 per month.

For additional information about benefits and services available from the Department of Veterans Affairs, see *Federal Benefits for Veterans, Dependents and Survivors* at http://www.va.gov/opa/publications/benefits_book.asp.

CONTACT: 1-800-827-1000 or statistics@ssa.gov.

A vertical strip on the left side of the page shows a close-up of the stars and stripes of the American flag. The stars are white and five-pointed, set against a dark background. The stripes are horizontal and alternate in color, though the colors are muted in this grayscale image.

Program Provisions and SSA Administrative Data

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

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

(Continued)

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

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

Year enacted	Coverage election or waiver	Provision
1984	...	Rehired federal employees whose previous service was covered.
	...	Persons exercising reemployment rights to noncovered federal employment retain exemption after a period (not limited to 365 or fewer days) of military or national guard service or work for an international organization.
	...	Generally, all legislative branch employees except those who were participating on December 31, 1983, and are also currently participating in the Civil Service Retirement System or another federal retirement system.
	...	Employees of nonprofit organizations who are also participating on a mandatory basis in the Civil Service Retirement System are treated like federal employees for Social Security tax and coverage purposes. They are therefore not covered unless hired on or after January 1, 1984, or reemployed after a break in service of more than 365 days.
	Elective by employer	Churches or church-related organizations may elect irrevocably to have services performed by their employees excluded from covered employment. Their employees are then treated as self-employed for Social Security purposes.
1986	...	State and local government employees hired after March 31, 1986—Hospital Insurance (Part A) program only.
	Elective by individual	Members of the clergy and of religious orders who filed an application for exemption from coverage may revoke the exemption if the revocation is filed before the due date of the individual's federal income tax return for the first taxable year beginning after October 22, 1986.
	Elective by employee	Employees covered under Civil Service Retirement System can elect to switch to Federal Employees Retirement System from July 1, 1987, to December 31, 1987.
1987	...	Members of uniformed services reserve components on inactive duty training. Irregularly employed farm workers (if employer's annual expenditures for farm labor is at least \$2,500). Services performed in trade or business of spouse or by children aged 18 or older in trade or business of parent. For employers, the full amount of covered tips.
1990	...	State and local government employees not under a state or local government retirement system. Exceptions: (1) students employed by the educational institution they attend and (2) election workers paid less than the mandated amount (\$100), unless either group covered under a state's Section 218 agreement.
1994	...	Threshold for exclusion of wages paid to election workers raised from \$100 to \$1,000 annually beginning January 1, 1995, and will be indexed for wage increases each year after December 31, 1999.
	...	Police and fire fighters under a public retirement system can be covered for Social Security in all states.
	...	Threshold for coverage of domestic employees' earnings raised from \$50 per calendar quarter to \$1,000 per calendar year per employer; amount subject to annual automatic adjustments. Domestic workers no longer covered for years in which they were under age 18, unless they are no longer in school and domestic employment is their principal occupation. Coverage of earnings of domestic workers on farms becomes subject to new annual threshold for domestic workers instead of annual threshold for agricultural employees.
1997	Elective by employee	Employees covered under Civil Service Retirement System can elect to switch to Federal Employees Retirement System from July 1, 1998, to December 31, 1998.
1998	...	States can modify their Social Security coverage agreements made between January 1, 1999, and March 31, 1999, to exclude from coverage services performed by students employed by state schools, colleges, or universities, effective for services performed after June 30, 2000.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

NOTE: ... = not applicable.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 who were aged 18 or older.
1977	For uniformed services, wage credits of \$100 for each \$300 of basic pay up to maximum credit of \$1,200 per calendar year after 1977.
2002	For uniformed services, deemed wage credits are eliminated for all years after calendar year 2001. Deemed wage credits will continue to be given for appropriate earnings for periods prior to calendar year 2002.

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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

Table 2.A3—Annual maximum taxable earnings and contribution rates, 1937–2011

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	^a 22,900	^a 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, 1937–2011—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
2005	^a 90,000	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2006	^a 94,200	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2007	^a 97,500	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2008	^a 102,000	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2009	^a 106,800	^e	7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2010	^a 106,800	^e	^f 7.65	5.3	0.9	1.45	15.3	10.6	1.8	2.9
2011	^a 106,800	^e	^g 7.65	5.3	0.9	1.45	^g 15.3	10.6	1.8	2.9

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

NOTES: DI = Disability Insurance; HI = Hospital Insurance; OASI = Old-Age and Survivors Insurance; OASDI = Old-Age, Survivors, and Disability Insurance; . . . = not applicable.

Table shows the contribution (tax) rates used to determine total amounts received by the trust funds. Occasional temporary tax credits and rate reductions affect the rates paid by employers, employees, or self-employed persons, and are summarized in footnotes as 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. 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.
- f. For 2010, most employers were exempt from paying the employer share of OASDI tax on wages paid to certain qualified individuals hired after February 3. Amounts equal to the revenue forgone will be transferred from the general fund of the Treasury to the OASI and DI trust funds.
- g. For 2011, the combined OASDI payroll tax rate is reduced by 2.0 percent for employees and for self-employed workers, resulting in a 4.2 percent effective tax rate for employees and a 10.4 percent effective tax rate for self-employed workers. The authorizing legislation, Public Law 111-312, does not specify percentage reductions attributable to the separate OASI and DI trust funds. Amounts equal to the revenue forgone will be transferred from the general fund of the Treasury to the trust funds.

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

Table 2.A4—Maximum annual amount of contributions, 1937–2011 (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

(Continued)

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

Table 2.A4—Maximum annual amount of contributions, 1937–2011 (in dollars)—Continued

Year	Employee					Self-employed person				
	Total, OASDI and HI	Subtotal, OASDI	OASI	DI	HI	Total, OASDI and HI	Subtotal, OASDI	OASI	DI	HI
2000	b	4,724.40	4,038.60	685.80	b	b	9,448.80	8,077.20	1,371.60	b
2001	b	4,984.80	4,261.20	723.60	b	b	9,969.60	8,522.40	1,447.20	b
2002	b	5,236.80	4,499.70	764.10	b	b	10,527.60	8,999.40	1,528.20	b
2003	b	5,394.00	4,611.00	783.00	b	b	10,788.00	9,222.00	1,566.00	b
2004	b	5,449.80	4,658.70	791.10	b	b	10,899.60	9,317.40	1,582.20	b
2005	b	5,580.00	4,770.00	810.00	b	b	11,160.00	9,540.00	1,620.00	b
2006	b	5,840.40	4,992.60	847.80	b	b	11,680.80	9,985.20	1,695.60	b
2007	b	6,045.00	5,167.50	877.50	b	b	12,090.00	10,335.00	1,755.00	b
2008	b	6,324.00	5,406.00	918.00	b	b	12,648.00	10,812.00	1,836.00	b
2009	b	6,621.60	5,660.40	961.20	b	b	13,243.20	11,320.80	1,922.40	b
2010	b	6,621.60	5,660.40	961.20	b	b	13,243.20	11,320.80	1,922.40	b
2011 ^c	b	6,621.60	5,660.40	961.20	b	b	13,243.20	11,320.80	1,922.40	b

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

NOTES: DI = Disability Insurance; HI = Hospital Insurance; OASI = Old-Age and Survivors Insurance; OASDI = Old-Age, Survivors, and Disability Insurance; . . . = not applicable.

Table shows the maximum contributions (taxes) received by the trust funds from an individual worker. Occasional temporary tax credits and rate reductions affect the amounts paid by workers, and are summarized in footnotes as applicable.

- a. In 1984, the 5.7 percent OASDI tax on taxable wages of employees was offset by a tax credit of 0.3 percent, resulting in an effective employee tax rate of 5.4 percent. However, the OASDI trust funds received the full 5.7 percent because of a general revenue transfer equivalent to 0.3 percent of taxable wages. Similar credits of 2.7 percent, 2.3 percent, and 2.0 percent were allowed against the combined OASDI and HI taxes on net earnings from self-employment in 1984, 1985, and from 1986 to 1989, respectively.
- b. Upper limit on earnings subject to HI taxes was repealed by the Omnibus Budget Reconciliation Act (OBRA) of 1993.
- c. For 2011, the combined OASDI payroll tax rate is reduced by 2.0 percent for employees and for self-employed workers. Thus, the maximum OASDI contribution for employees is \$4,485.60 and for self-employed workers is \$11,107.20. The authorizing legislation, Public Law 111-312, does not specify percentage reductions attributable to the separate OASI and DI trust funds. Amounts equal to the revenue forgone will be transferred from the general fund of the Treasury to the trust funds.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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

Table 2.A5—Tax credits enacted in 1983

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

NOTES: During this period, scheduled taxes were credited to the Social Security (Old-Age, Survivors, and Disability Insurance, or OASDI) trust funds, monies for tax credits were paid from the Treasury, and the reduced tax rates were paid by employees and the self-employed.

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

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

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

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<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																																																																				
<i>Quarter of coverage</i>																																																																					
1939	Calendar quarter in which \$50 of wages is earned. Four quarters of coverage (QC) are credited for covered earnings equal to maximum limitation for the year.																																																																				
1946	Calendar quarter in which \$50 of wages is paid.																																																																				
1950	Calendar quarter credited with \$100 of self-employment income (reported annually).																																																																				
1954	Calendar quarter credited with \$100 of agricultural wages (reported annually).																																																																				
1977	Calendar quarters of coverage (up to 4) for each \$250 of annual earnings, effective January 1, 1978 (<i>effective on January 1 of each year, dollar amount subject to automatic increase</i>):																																																																				
	<table border="0"> <thead> <tr> <th style="text-align: left;">Year</th> <th style="text-align: right;">Amount (dollars)</th> </tr> </thead> <tbody> <tr><td>1979</td><td style="text-align: right;">260</td></tr> <tr><td>1980</td><td style="text-align: right;">290</td></tr> <tr><td>1981</td><td style="text-align: right;">310</td></tr> <tr><td>1982</td><td style="text-align: right;">340</td></tr> <tr><td>1983</td><td style="text-align: right;">370</td></tr> <tr><td>1984</td><td style="text-align: right;">390</td></tr> <tr><td>1985</td><td style="text-align: right;">410</td></tr> <tr><td>1986</td><td style="text-align: right;">440</td></tr> <tr><td>1987</td><td style="text-align: right;">460</td></tr> <tr><td>1988</td><td style="text-align: right;">470</td></tr> <tr><td>1989</td><td style="text-align: right;">500</td></tr> <tr><td>1990</td><td style="text-align: right;">520</td></tr> <tr><td>1991</td><td style="text-align: right;">540</td></tr> <tr><td>1992</td><td style="text-align: right;">570</td></tr> <tr><td>1993</td><td style="text-align: right;">590</td></tr> <tr><td>1994</td><td style="text-align: right;">620</td></tr> <tr><td>1995</td><td style="text-align: right;">630</td></tr> <tr><td>1996</td><td style="text-align: right;">640</td></tr> <tr><td>1997</td><td style="text-align: right;">670</td></tr> <tr><td>1998</td><td style="text-align: right;">700</td></tr> <tr><td>1999</td><td style="text-align: right;">740</td></tr> <tr><td>2000</td><td style="text-align: right;">780</td></tr> <tr><td>2001</td><td style="text-align: right;">830</td></tr> <tr><td>2002</td><td style="text-align: right;">870</td></tr> <tr><td>2003</td><td style="text-align: right;">890</td></tr> <tr><td>2004</td><td style="text-align: right;">900</td></tr> <tr><td>2005</td><td style="text-align: right;">920</td></tr> <tr><td>2006</td><td style="text-align: right;">970</td></tr> <tr><td>2007</td><td style="text-align: right;">1,000</td></tr> <tr><td>2008</td><td style="text-align: right;">1,050</td></tr> <tr><td>2009</td><td style="text-align: right;">1,090</td></tr> <tr><td>2010</td><td style="text-align: right;">1,120</td></tr> <tr><td>2011</td><td style="text-align: right;">1,120</td></tr> </tbody> </table>	Year	Amount (dollars)	1979	260	1980	290	1981	310	1982	340	1983	370	1984	390	1985	410	1986	440	1987	460	1988	470	1989	500	1990	520	1991	540	1992	570	1993	590	1994	620	1995	630	1996	640	1997	670	1998	700	1999	740	2000	780	2001	830	2002	870	2003	890	2004	900	2005	920	2006	970	2007	1,000	2008	1,050	2009	1,090	2010	1,120	2011	1,120
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<i>Disability definition</i>																																																																					
1954	Inability to engage in substantial gainful activity because of any medically determinable permanent physical or mental impairment.																																																																				
1965	Disability lasting at least 12 months. For blind persons aged 55–64, inability to engage in usual occupation.																																																																				
1967	Disability that precludes engagement in any substantial gainful work existing in the national economy. For surviving spouse, disability precludes any gainful activity.																																																																				
1990	More restrictive definition for surviving spouse eliminated.																																																																				
<i>Period of disability</i>																																																																					
1954	Continuous period of at least 6 months as defined above or of blindness.																																																																				
1972	At least 5 months of disability.																																																																				

(Continued)

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

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

Year enacted	Provision
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.
2004	Workers who are not citizens or nationals of the United States (referred to here as noncitizens) must meet additional requirements to be fully or currently insured. Noncitizen workers whose Social Security number (SSN) was originally assigned on or after January 1, 2004, must have been issued an SSN for work purposes at any time on or after January 1, 2004; or must have been admitted to the United States at any time as a nonimmigrant visitor for business (B-1) or as an alien crewman (D-1 or D-2).
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.
2004	Workers who are not citizens or nationals of the United States (referred to here as noncitizens) must meet additional requirements to be fully or currently insured. Noncitizen workers whose Social Security number (SSN) was originally assigned on or after January 1, 2004, must have been issued an SSN for work purposes at any time on or after January 1, 2004; or must have been admitted to the United States at any time as a nonimmigrant visitor for business (B-1) or as an alien crewman (D-1 or D-2).
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, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A8—Factors for indexing earnings, 1951–2011

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 —							
			1996	1997	1998	1999	2000	2001	2002	2003
1951	3,600	2,799.16	8.4859494	8.8260978	9.2577416	9.7979394	10.3107504	10.8853513	11.4873105	11.7613570
1952	3,600	2,973.32	7.9888912	8.3091157	8.7154763	9.2240324	9.7068059	10.2477500	10.8144498	11.0724443
1953	3,600	3,139.44	7.5661679	7.8694481	8.2543065	8.7359529	9.1931809	9.7055016	10.2422152	10.4865581
1954	3,600	3,155.64	7.5273257	7.8290489	8.2119317	8.6911054	9.1459862	9.6556768	10.1896351	10.4327236
1955	4,200	3,301.44	7.1948998	7.4832982	7.8492718	8.3072841	8.7420762	9.2292575	9.7396348	9.9719880
1956	4,200	3,532.36	6.7245496	6.9940946	7.3361435	7.7642143	8.1705828	8.6259158	9.1029284	9.3200919
1957	4,200	3,641.72	6.5226129	6.7840636	7.1158409	7.5310568	7.9252221	8.3668816	8.8295695	9.0402118
1958	4,200	3,673.80	6.4656568	6.7248244	7.0537046	7.4652948	7.8560183	8.2938211	8.7524688	8.9612717
1959	4,800	3,855.80	6.1604673	6.4074018	6.7207583	7.1129208	7.4852015	7.9023393	8.3393381	8.5382852
1960	4,800	4,007.12	5.9278310	6.1654405	6.4669638	6.8443171	7.2025395	7.6039250	8.0244215	8.2158558
1961	4,800	4,086.76	5.8123134	6.0452926	6.3409400	6.7109397	7.0621813	7.4557449	7.8680471	8.0557508
1962	4,800	4,291.40	5.5351470	5.7570164	6.0385655	6.3909214	6.7254136	7.1002097	7.4928508	7.6716037
1963	4,800	4,396.64	5.4026552	5.6192138	5.8940236	6.2379453	6.5644310	6.9302558	7.3134985	7.4879726
1964	4,800	4,576.32	5.1905308	5.3985866	5.6626066	5.9930250	6.3066918	6.6581533	7.0263487	7.1939724
1965	4,800	4,658.72	5.0987245	5.3031004	5.5624506	5.8870248	6.1951437	6.5403888	6.9020718	7.0667308
1966	6,600	4,938.36	4.8100037	5.0028066	5.2474708	5.5536656	5.8443370	6.1700322	6.5112345	6.6665695
1967	6,600	5,213.44	4.5562105	4.7388404	4.9705952	5.2606341	5.5359686	5.8444789	6.1676782	6.3148171
1968	7,800	5,571.76	4.2632005	4.4340855	4.6509361	4.9223226	5.1799503	5.4686203	5.7710346	5.9087111
1969	7,800	5,893.76	4.0302846	4.1918334	4.3968367	4.6533961	4.8969486	5.1698474	5.4557396	5.5858942
1970	7,800	6,186.24	3.8397363	3.9936472	4.1889581	4.4333876	4.6654252	4.9254216	5.1977970	5.3217981
1971	7,800	6,497.08	3.6560316	3.8025790	3.9885456	4.2212809	4.4422171	4.6897745	4.9491187	5.0671871
1972	9,000	7,133.80	3.3297163	3.4631837	3.6325521	3.8445148	4.0457316	4.2711935	4.5073902	4.6149205
1973	10,800	7,580.16	3.1336449	3.2592531	3.4186482	3.6181294	3.8074975	4.0196830	4.2419711	4.3431695
1974	13,200	8,030.76	2.9578184	3.0763788	3.2268303	3.4151189	3.5938616	3.7941415	4.0039573	4.0994775
1975	14,100	8,630.92	2.7521435	2.8624596	3.0024493	3.1776450	3.3439587	3.5303119	3.7255379	3.8144161
1976	15,300	9,226.48	2.5744954	2.6776907	2.8086443	2.9725312	3.1281095	3.3024339	3.4850582	3.5681994
1977	16,500	9,779.44	2.4289254	2.5262858	2.6498348	2.8044551	2.9512365	3.1157040	3.2880022	3.3664423
1978	17,700	10,556.03	2.2502333	2.3404310	2.4548907	2.5981359	2.7341188	2.8864867	3.0461092	3.1187786
1979	22,900	11,479.46	2.0692202	2.1521622	2.2574145	2.3891368	2.5141810	2.6542921	2.8010743	2.8678980
1980	25,900	12,513.46	1.8982384	1.9743268	2.0708821	2.1917200	2.3064316	2.4349652	2.5696186	2.6309206
1981	29,700	13,773.10	1.7246321	1.7937618	1.8814864	1.9912728	2.0954934	2.2122717	2.3346102	2.3903057
1982	32,400	14,531.34	1.6346414	1.7001639	1.7833111	1.8873690	1.9861513	2.0968362	2.2127911	2.2655805
1983	35,700	15,239.24	1.5587083	1.6211871	1.7004719	1.7996960	1.8938897	1.9994330	2.1100015	2.1603387
1984	37,800	16,135.07	1.4721678	1.5311777	1.6060606	1.6997757	1.7887397	1.8884232	1.9928528	2.0403952
1985	39,600	16,822.51	1.4120087	1.4686072	1.5404301	1.6303156	1.7156441	1.8112541	1.9114163	1.9570159
1986	42,000	17,321.82	1.3713068	1.4262739	1.4960264	1.5833209	1.6661898	1.7590438	1.8563188	1.9006040
1987	43,800	18,426.51	1.2890954	1.3407672	1.4063379	1.4883991	1.5662999	1.6535871	1.7450304	1.7866606
1988	45,000	19,334.04	1.2285860	1.2778323	1.3403251	1.4185344	1.4927785	1.5759686	1.6631196	1.7027957
1989	48,000	20,099.55	1.1817941	1.2291648	1.2892776	1.3645082	1.4359247	1.5159464	1.5997781	1.6379431
1990	51,300	21,027.98	1.1296154	1.1748946	1.2323533	1.3042622	1.3725256	1.4490141	1.5291445	1.5656245
1991	53,400	21,811.60	1.0890320	1.1326844	1.1880788	1.2574043	1.3232152	1.3969557	1.4742073	1.5093767
1992	55,500	22,935.42	1.0356702	1.0771837	1.1298638	1.1957924	1.2583785	1.3285059	1.4019721	1.4354182
1993	57,600	23,132.67	1.0268391	1.0679986	1.1202295	1.1855960	1.2476485	1.3171778	1.3900177	1.4231786
1994	60,600	23,753.53	1.0000000	1.0400837	1.0909494	1.1546073	1.2150379	1.2827500	1.3536860	1.3859801
1995	61,200	24,705.66	1.0000000	1.0000000	1.0489054	1.1101100	1.1682117	1.2333141	1.3015163	1.3325659
1996	62,700	25,913.90	1.0000000	1.0000000	1.0000000	1.0583509	1.1137436	1.1758107	1.2408329	1.2704348
1997	65,400	27,426.00	1.0000000	1.0000000	1.0000000	1.0000000	1.0523387	1.1109837	1.1724211	1.2003909
1998	68,400	28,861.44	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0557283	1.1141100	1.1406888
1999	72,600	30,469.84	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0552999	1.0804756

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A8—Factors for indexing earnings, 1951–2011—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 —							
			1996	1997	1998	1999	2000	2001	2002	2003
2000	76,200	32,154.82	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0238565
2001	80,400	32,921.92	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2002	84,900	33,252.09	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2003	87,000	34,064.95	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2004	87,900	35,648.55	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2005	90,000	36,952.94	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2006	94,200	38,651.41	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2007	97,500	40,405.48	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2008	102,000	41,334.97	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2009	106,800	40,711.61	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2010	106,800	--	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2011	106,800	--	1.0000000	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, 1951–2011—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 —							
			2004	2005	2006	2007	2008	2009	2010	2011
1951	3,600	2,799.16	11.8793102	12.1697045	12.7354456	13.2014390	13.8082175	14.4348590	14.7669194	14.5442240
1952	3,600	2,973.32	11.1834885	11.4568731	11.9894764	12.4281746	12.9994114	13.5893479	13.9019581	13.6923069
1953	3,600	3,139.44	10.5917265	10.8506453	11.3550665	11.7705514	12.3115619	12.8702826	13.1663513	12.9677936
1954	3,600	3,155.64	10.5373522	10.7949418	11.2967734	11.7101254	12.2483585	12.8042109	13.0987597	12.9012213
1955	4,200	3,301.44	10.0719959	10.3182096	10.7978791	11.1929764	11.7074398	12.2387443	12.5202851	12.3314705
1956	4,200	3,532.36	9.4135620	9.6436801	10.0919923	10.4612610	10.9420925	11.4386642	11.7017999	11.5253287
1957	4,200	3,641.72	9.1308750	9.3540827	9.7889322	10.1471118	10.6135041	11.0951638	11.3503976	11.1792258
1958	4,200	3,673.80	9.0511432	9.2724019	9.7034542	10.0585062	10.5208258	10.9982797	11.2512848	11.0816076
1959	4,800	3,855.80	8.6239146	8.8347295	9.2454354	9.5837284	10.0242258	10.4791431	10.7202059	10.5585378
1960	4,800	4,007.12	8.2982516	8.5011055	8.8963021	9.2218202	9.6456832	10.0834215	10.3153811	10.1598180
1961	4,800	4,086.76	8.1365409	8.3354418	8.7229370	9.0421116	9.4577147	9.8869226	10.1143620	9.9618304
1962	4,800	4,291.40	7.7485413	7.9379573	8.3069744	8.6109288	9.0067134	9.4154542	9.6320478	9.4867899
1963	4,800	4,396.64	7.5630686	7.7479507	8.1081348	8.4048137	8.7911246	9.1900815	9.4014907	9.2597097
1964	4,800	4,576.32	7.2661199	7.4437430	7.7897852	8.0748156	8.4459588	8.8292515	9.0323601	8.8961458
1965	4,800	4,658.72	7.1376022	7.3120836	7.6520053	7.9319942	8.2965729	8.6730862	8.8726023	8.7387974
1966	6,600	4,938.36	6.7334277	6.8980289	7.2187022	7.4828364	7.8267704	8.1819632	8.3701816	8.2439535
1967	6,600	5,213.44	6.3781476	6.5340639	6.8378173	7.0880148	7.4138016	7.7502532	7.9285405	7.8089726
1968	7,800	5,571.76	5.9679688	6.1138581	6.3980771	6.6321844	6.9370199	7.2518342	7.4186559	7.3067774
1969	7,800	5,893.76	5.6419145	5.7798332	6.0485242	6.2698413	6.5580224	6.8556371	7.0133446	6.9075785
1970	7,800	6,186.24	5.3751697	5.5065678	5.7625553	5.9734087	6.2479648	6.5315086	6.6817598	6.5809943
1971	7,800	6,497.08	5.1180053	5.2431169	5.4868572	5.6876227	5.9490433	6.2190215	6.3620842	6.2661396
1972	9,000	7,133.80	4.6612030	4.7751479	4.9971334	5.1799798	5.4180675	5.6639491	5.7942429	5.7068617
1973	10,800	7,580.16	4.3867267	4.4939619	4.7028757	4.8749551	5.0990230	5.3304257	5.4530472	5.3708114
1974	13,200	8,030.76	4.1405907	4.2418090	4.4390008	4.6014250	4.8129206	5.0313395	5.1470807	5.0694592
1975	14,100	8,630.92	3.8526704	3.9468504	4.1303303	4.2814601	4.4782491	4.6814801	4.7891731	4.7169491
1976	15,300	9,226.48	3.6039844	3.6920852	3.8637216	4.0050962	4.1891827	4.3792952	4.4800368	4.4124747
1977	16,500	9,779.44	3.4002039	3.4833232	3.6452547	3.7786356	3.9523132	4.1316763	4.2267216	4.1629797
1978	17,700	10,556.03	3.1500564	3.2270607	3.3770793	3.5006475	3.6615479	3.8277155	3.9157685	3.8567160
1979	22,900	11,479.46	2.8966598	2.9674697	3.1054205	3.2190486	3.3670059	3.5198067	3.6007765	3.5464743
1980	25,900	12,513.46	2.6573058	2.7222647	2.8488164	2.9530554	3.0887868	3.2289615	3.3032407	3.2534255
1981	29,700	13,773.10	2.4142778	2.4732958	2.5882735	2.6829791	2.8062971	2.9336518	3.0011377	2.9558785
1982	32,400	14,531.34	2.2883017	2.3442401	2.4532184	2.5429823	2.6598655	2.7805750	2.8445395	2.8016418
1983	35,700	15,239.24	2.1820045	2.2353444	2.3392604	2.4248545	2.5363082	2.6514104	2.7124036	2.6714987
1984	37,800	16,135.07	2.0608581	2.1112366	2.2093830	2.2902250	2.3954907	2.5042023	2.5618092	2.5231753
1985	39,600	16,822.51	1.9766426	2.0249624	2.1190982	2.1966365	2.2976007	2.4018699	2.4571226	2.4200675
1986	42,000	17,321.82	1.9196649	1.9665918	2.0580141	2.1333174	2.2313712	2.3326348	2.3862949	2.3503079
1987	43,800	18,426.51	1.8045788	1.8486925	1.9346339	2.0054226	2.0975980	2.1927907	2.2432338	2.2094043
1988	45,000	19,334.04	1.7198728	1.7619158	1.8438231	1.9112891	1.9991378	2.0898622	2.1379375	2.1056960
1989	48,000	20,099.55	1.6543699	1.6948116	1.7735994	1.8384959	1.9229988	2.0102679	2.0565122	2.0254986
1990	51,300	21,027.98	1.5813259	1.6199820	1.6952912	1.7573224	1.8380943	1.9215103	1.9657128	1.9360685
1991	53,400	21,811.60	1.5245140	1.5617813	1.6343849	1.6941875	1.7720575	1.8524767	1.8950911	1.8665119
1992	55,500	22,935.42	1.4498139	1.4852551	1.5543012	1.6111735	1.6852279	1.7617066	1.8022330	1.7750540
1993	57,600	23,132.67	1.4374514	1.4725905	1.5410478	1.5974351	1.6708581	1.7466847	1.7868655	1.7599183
1994	60,600	23,753.53	1.3998799	1.4341005	1.5007685	1.5556820	1.6271859	1.7010305	1.7401611	1.7139183
1995	61,200	24,705.66	1.3459300	1.3788318	1.4429305	1.4957277	1.5644759	1.6354746	1.6730972	1.6478657
1996	62,700	25,913.90	1.2831758	1.3145435	1.3756536	1.4259891	1.4915320	1.5592203	1.5950887	1.5710337
1997	65,400	27,426.00	1.2124294	1.2420677	1.2998086	1.3473689	1.4092981	1.4732546	1.5071454	1.4844166
1998	68,400	28,861.44	1.1521286	1.1802928	1.2351619	1.2803568	1.3392059	1.3999814	1.4321867	1.4105883
1999	72,600	30,469.84	1.0913116	1.1179891	1.1699618	1.2127711	1.2685137	1.3260811	1.3565864	1.3361281

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A8—Factors for indexing earnings, 1951–2011—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 —							
			2004	2005	2006	2007	2008	2009	2010	2011
2000	76,200	32,154.82	1.0341246	1.0594042	1.1086534	1.1492193	1.2020409	1.2565917	1.2854984	1.2661122
2001	80,400	32,921.92	1.0100289	1.0347194	1.0828211	1.1224418	1.1740327	1.2273124	1.2555455	1.2366110
2002	84,900	33,252.09	1.0000000	1.0244454	1.0720695	1.1112968	1.1623754	1.2151260	1.2430789	1.2243324
2003	87,000	34,064.95	1.0000000	1.0000000	1.0464877	1.0847789	1.1346387	1.1861306	1.2134164	1.1951173
2004	87,900	35,648.55	1.0000000	1.0000000	1.0000000	1.0365903	1.0842351	1.1334396	1.1595134	1.1420271
2005	90,000	36,952.94	1.0000000	1.0000000	1.0000000	1.0000000	1.0459631	1.0934307	1.1185841	1.1017150
2006	94,200	38,651.41	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0453818	1.0694298	1.0533021
2007	97,500	40,405.48	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0230041	1.0075764
2008	102,000	41,334.97	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	0.9849193
2009	106,800	40,711.61	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2010	106,800	--	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2011	106,800	--	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

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, 1951–2011 (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 —							
			2004	2005	2006	2007	2008	2009	2010	2011
1951	3,600	2,799.16	42,765.52	43,810.94	45,847.60	47,525.18	49,709.58	51,965.49	53,160.91	52,359.21
1952	3,600	2,973.32	40,260.56	41,244.74	43,162.12	44,741.43	46,797.88	48,921.65	50,047.05	49,292.30
1953	3,600	3,139.44	38,130.22	39,062.32	40,878.24	42,373.99	44,321.62	46,333.02	47,398.86	46,684.06
1954	3,600	3,155.64	37,934.47	38,861.79	40,668.38	42,156.45	44,094.09	46,095.16	47,155.53	46,444.40
1955	4,200	3,301.44	42,302.38	43,336.48	45,351.09	47,010.50	49,171.25	51,402.73	52,585.20	51,792.18
1956	4,200	3,532.36	39,536.96	40,503.46	42,386.37	43,937.30	45,956.79	48,042.39	49,147.56	48,406.38
1957	4,200	3,641.72	38,349.67	39,287.15	41,113.52	42,617.87	44,576.72	46,599.69	47,671.67	46,952.75
1958	4,200	3,673.80	38,014.80	38,944.09	40,754.51	42,245.73	44,187.47	46,192.77	47,255.40	46,542.75
1959	4,800	3,855.80	41,394.79	42,406.70	44,378.09	46,001.90	48,116.28	50,299.89	51,456.99	50,680.98
1960	4,800	4,007.12	39,831.61	40,805.31	42,702.25	44,264.74	46,299.28	48,400.42	49,513.83	48,767.13
1961	4,800	4,086.76	39,055.40	40,010.12	41,870.10	43,402.14	45,397.03	47,457.23	48,548.94	47,816.79
1962	4,800	4,291.40	37,193.00	38,102.20	39,873.48	41,332.46	43,232.22	45,194.18	46,233.83	45,536.59
1963	4,800	4,396.64	36,302.73	37,190.16	38,919.05	40,343.11	42,197.40	44,112.39	45,127.16	44,446.61
1964	4,800	4,576.32	34,877.38	35,729.97	37,390.97	38,759.11	40,540.60	42,380.41	43,355.33	42,701.50
1965	4,800	4,658.72	34,260.49	35,098.00	36,729.63	38,073.57	39,823.55	41,630.81	42,588.49	41,946.23
1966	6,600	4,938.36	44,440.62	45,526.99	47,643.43	49,386.72	51,656.68	54,000.96	55,243.20	54,410.09
1967	6,600	5,213.44	42,095.77	43,124.82	45,129.59	46,780.90	48,931.09	51,151.67	52,328.37	51,539.22
1968	7,800	5,571.76	46,550.16	47,688.09	49,905.00	51,731.04	54,108.76	56,564.31	57,865.52	56,992.86
1969	7,800	5,893.76	44,006.93	45,082.70	47,178.49	48,904.76	51,152.57	53,473.97	54,704.09	53,879.11
1970	7,800	6,186.24	41,926.32	42,951.23	44,947.93	46,592.59	48,734.13	50,945.77	52,117.73	51,331.76
1971	7,800	6,497.08	39,920.44	40,896.31	42,797.49	44,363.46	46,402.54	48,508.37	49,624.26	48,875.89
1972	9,000	7,133.80	41,950.83	42,976.33	44,974.20	46,619.82	48,762.61	50,975.54	52,148.19	51,361.76
1973	10,800	7,580.16	47,376.65	48,534.79	50,791.06	52,649.52	55,069.45	57,568.60	58,892.91	58,004.76
1974	13,200	8,030.76	54,655.80	55,991.88	58,594.81	60,738.81	63,530.55	66,413.68	67,941.47	66,916.86
1975	14,100	8,630.92	54,322.65	55,650.59	58,237.66	60,368.59	63,143.31	66,008.87	67,527.34	66,508.98
1976	15,300	9,226.48	55,140.96	56,488.90	59,114.94	61,277.97	64,094.49	67,003.22	68,544.56	67,510.86
1977	16,500	9,779.44	56,103.36	57,474.83	60,146.70	62,347.49	65,213.17	68,172.66	69,740.91	68,689.17
1978	17,700	10,556.03	55,756.00	57,118.98	59,774.30	61,961.46	64,809.40	67,750.56	69,309.10	68,263.87
1979	22,900	11,479.46	66,333.51	67,955.06	71,114.13	73,716.21	77,104.44	80,603.57	82,457.78	81,214.26
1980	25,900	12,513.46	68,824.22	70,506.65	73,784.34	76,484.13	79,999.58	83,630.10	85,553.93	84,263.72
1981	29,700	13,773.10	71,704.05	73,456.88	76,871.72	79,684.48	83,347.02	87,129.46	89,133.79	87,789.59
1982	32,400	14,531.34	74,140.98	75,953.38	79,484.27	82,392.63	86,179.64	90,090.63	92,163.08	90,773.19
1983	35,700	15,239.24	77,897.56	79,801.80	83,511.59	86,567.31	90,546.20	94,655.35	96,832.81	95,372.50
1984	37,800	16,135.07	77,900.44	79,804.74	83,514.68	86,570.50	90,549.55	94,658.85	96,836.39	95,376.03
1985	39,600	16,822.51	78,275.05	80,188.51	83,916.29	86,986.81	90,984.99	95,114.05	97,302.05	95,834.67
1986	42,000	17,321.82	80,625.93	82,596.86	86,436.59	89,599.33	93,717.59	97,970.66	100,224.39	98,712.93
1987	43,800	18,426.51	79,040.55	80,972.73	84,736.96	87,837.51	91,874.79	96,044.23	98,253.64	96,771.91
1988	45,000	19,334.04	77,394.28	79,286.21	82,972.04	86,008.01	89,961.20	94,043.80	96,207.19	94,756.32
1989	48,000	20,099.55	79,409.75	81,350.96	85,132.77	88,247.80	92,303.94	96,492.86	98,712.59	97,223.93
1990	51,300	21,027.98	81,122.02	83,105.08	86,968.44	90,150.64	94,294.24	98,573.48	100,841.07	99,320.31
1991	53,400	21,811.60	81,409.05	83,399.12	87,276.15	90,469.61	94,627.87	98,922.26	101,197.86	99,671.74
1992	55,500	22,935.42	80,464.67	82,431.66	86,263.71	89,420.13	93,530.15	97,774.72	100,023.93	98,515.50
1993	57,600	23,132.67	82,797.20	84,821.21	88,764.35	92,012.26	96,241.43	100,609.04	102,923.45	101,371.29
1994	60,600	23,753.53	84,832.72	86,906.49	90,946.57	94,274.33	98,607.47	103,082.45	105,453.76	103,863.45
1995	61,200	24,705.66	82,370.92	84,384.51	88,307.35	91,538.54	95,745.93	100,091.05	102,393.55	100,849.38
1996	62,700	25,913.90	80,455.12	82,421.88	86,253.48	89,409.52	93,519.05	97,763.11	100,012.06	98,503.81
1997	65,400	27,426.00	79,292.89	81,231.23	85,007.48	88,117.93	92,168.10	96,350.85	98,567.31	97,080.85
1998	68,400	28,861.44	78,805.60	80,732.03	84,485.07	87,576.40	91,601.68	95,758.73	97,961.57	96,484.24
1999	72,600	30,469.84	79,229.22	81,166.01	84,939.23	88,047.18	92,094.10	96,273.49	98,488.17	97,002.90

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A9—Indexed earnings for workers with maximum earnings, 1951–2011 (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 —							
			2004	2005	2006	2007	2008	2009	2010	2011
2000	76,200	32,154.82	78,800.29	80,726.60	84,479.39	87,570.51	91,595.52	95,752.29	97,954.98	96,477.75
2001	80,400	32,921.92	81,206.32	83,191.44	87,058.82	90,244.32	94,392.23	98,675.92	100,945.86	99,423.52
2002	84,900	33,252.09	84,900.00	86,975.41	91,018.70	94,349.10	98,685.67	103,164.20	105,537.40	103,945.82
2003	87,000	34,064.95	87,000.00	87,000.00	91,044.43	94,375.77	98,713.57	103,193.36	105,567.23	103,975.21
2004	87,900	35,648.55	87,900.00	87,900.00	87,900.00	91,116.28	95,304.27	99,629.34	101,921.23	100,384.18
2005	90,000	36,952.94	90,000.00	90,000.00	90,000.00	90,000.00	94,136.67	98,408.76	100,672.57	99,154.35
2006	94,200	38,651.41	94,200.00	94,200.00	94,200.00	94,200.00	94,200.00	98,474.97	100,740.29	99,221.06
2007	97,500	40,405.48	97,500.00	97,500.00	97,500.00	97,500.00	97,500.00	97,500.00	99,742.90	98,238.70
2008	102,000	41,334.97	102,000.00	102,000.00	102,000.00	102,000.00	102,000.00	102,000.00	102,000.00	100,461.77
2009	106,800	40,711.61	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00
2010	106,800	--	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00
2011	106,800	--	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00	106,800.00

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

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 2011, the indexing factor for 1982 is $\$40,711.61/\$14,531.34$ or 2.8016418. Multiplication of maximum taxable earnings of \$32,400 for 1982 by this factor gives maximum indexed earnings of \$90,773.19 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
Average monthly wage (AMW)	
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.
Average indexed monthly earnings (AIME)	
1977	For workers who attain age 62, become disabled, or die after 1978, AIME is computed by using indexed earnings after 1950 for the same computation period applicable in calculating the AMW. Indexed earnings for a given year equal actual creditable earnings multiplied by the national average wage for the second year before worker attains age 62, becomes disabled, or dies, divided by the national average wage for the given year, except that for years after the second year before the worker attains age 62, becomes disabled, or dies, indexed earnings equal actual creditable earnings.
1980	For disabled workers, the number of years of earnings used equals the number of years elapsed after 1950 (or year age 21 attained, if later) and before year of disability, minus dropout years equal to one-fifth of the number of elapsed years rounded to the next lower integer (to a maximum of 5 dropout years). However, the number of years of earnings used is at least 2. <i>Effective for initial entitlement after June 1980.</i> Disabled workers with computations using fewer than 3 dropout years under the one-fifth rule may be credited with additional dropout years based on child care, up to a total of 3 dropout years. (To receive this credit, a worker must have had no earnings in that year and have been living with his or her child or spouse's child under age 3.) However, the number of years of earnings used is at least 2. <i>Effective July 1981.</i>
1983	For workers who die after 1978 but before attaining age 62, indexed earnings for a given year equal actual creditable earnings, multiplied by the national average wage for the earlier of (1) the year in which the worker reached or would have reached age 60 or (2) the second year before the survivor becomes eligible for aged or disabled widow(er) benefits, and then divided by the national average wage for the given year. This computation method applies only if it results in a higher benefit. <i>Effective for surviving spouses first eligible after 1984.</i>

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

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2.A OASDI: Benefit Computation and Automatic Adjustments

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

Eligibility year	Calculation of PIA (based on percentage of AIME) ^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	
<i>Enacted in 1977^b</i>						
1979	180	905	1,085	June 1979	9.9	^c 122
1980	194	977	1,171	June 1980	14.3	^c 122
<i>Enacted in 1981</i>						
1981	211	1,063	1,274	June 1981	11.2	^c 122
1982	230	1,158	1,388	June 1982	7.4	^d
<i>Enacted in 1983</i>						
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

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

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

Eligibility year	Calculation of PIA (based on percentage of AIME) ^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	
<i>Enacted in 1983 (cont.)</i>						
2001	561	2,820	3,381	December 2001	2.6	d
2002	592	2,975	3,567	December 2002	1.4	d
2003	606	3,047	3,653	December 2003	2.1	d
2004	612	3,077	3,689	December 2004	2.7	d
2005	627	3,152	3,779	December 2005	4.1	d
2006	656	3,299	3,955	December 2006	3.3	d
2007	680	3,420	4,100	December 2007	2.3	d
2008	711	3,577	4,288	December 2008	5.8	d
2009	744	3,739	4,483	December 2009	0.0	d
2010	761	3,825	4,586	December 2010	0.0	d
2011	749	3,768	4,517	December 2011	--	d

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

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.

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2.A OASDI: Benefit Computation and Automatic Adjustments

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

Year effective	Provision																				
	<i>Enacted in 1983</i>																				
1986	Workers first eligible for pensions based on noncovered employment and disability or retired workers after December 31, 1985. ^a The benefit computation formula uses a reduced factor of the usual first AIME bend point.																				
	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><i>Year eligible</i></th> <th style="text-align: center;"><i>Factor (percent)</i></th> </tr> </thead> <tbody> <tr><td>1986</td><td style="text-align: center;">80</td></tr> <tr><td>1987</td><td style="text-align: center;">70</td></tr> <tr><td>1988</td><td style="text-align: center;">60</td></tr> <tr><td>1989</td><td style="text-align: center;">50</td></tr> <tr><td>1990 and later</td><td style="text-align: center;">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="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><i>Years of coverage</i></th> <th style="text-align: center;"><i>Factor (percent)</i></th> </tr> </thead> <tbody> <tr><td>26</td><td style="text-align: center;">50</td></tr> <tr><td>27</td><td style="text-align: center;">60</td></tr> <tr><td>28</td><td style="text-align: center;">70</td></tr> <tr><td>29</td><td style="text-align: center;">80</td></tr> </tbody> </table>	<i>Years of coverage</i>	<i>Factor (percent)</i>	26	50	27	60	28	70	29	80										
<i>Years of coverage</i>	<i>Factor (percent)</i>																				
26	50																				
27	60																				
28	70																				
29	80																				
	<i>Enacted in 1988</i>																				
1989	5 percent added to factor for each year of coverage over 20.																				
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<i>Years of coverage</i>	<i>Factor (percent)</i>																				
21	45																				
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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>Year</i>	<i>Earnings (dollars)</i>
	1991	9,900
	1992	10,350
	1993	10,725
	1994	11,250
	1995	11,325
	1996	11,625
	1997	12,150
	1998	12,675
	1999	13,425
	2000	14,175
	2001	14,925
	2002	15,750
	2003	16,125
	2004	16,275
	2005	16,725
	2006	17,475
	2007	18,150
	2008	18,975
	2009	19,800
	2010	19,800
	2011	19,800

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

- a. Reduction in PIA will not be greater than one-half the amount of the pension based on noncovered employment performed after 1956.
- b. See Table 2.A12. Before 1991, a year of substantial coverage for WEP was the same amount as for the minimum PIA (25 percent of the "old law" contribution and benefit base). For 1991 and following, a year of substantial coverage under WEP provisions remains 25 percent of the old law base, while the criterion for computing the special minimum PIA was changed to 15 percent of the base.

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2.A OASDI: Benefit Computation and Automatic Adjustments

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

Year enacted	Number of years of coverage	PIA computation		
1972	For 1937–1950, the number (disregarding any remainder and not exceeding 14) obtained by dividing total creditable wages in 1937–1950 by \$900			Maximum amount ^a for workers with 30 or more years of coverage (dollars)
	After 1950, the number of years with creditable earnings equal to at least 25 percent of the effective annual maximum taxable earnings, that is:	Effective date	Amount ^a per year of coverage over 10 years (dollars)	
	Year	Amount (dollars)	January 1973	8.50
	1951–1954	900		170.00
	1955–1958	1,050		
	1959–1965	1,200		
	1966–1967	1,650		
	1968–1971	1,950		
	1972	2,250		
	1973	2,700		
	1974	3,300		
	1975	3,525		
	1976	3,825		
	1977	4,125		
	1978	4,425		
1973	...			Maximum amount ^a for workers with 30 or more years of coverage (dollars)
		Effective date	Amount ^a per year of coverage over 10 years (dollars)	
		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:	Effective date	Amount ^a per year of coverage over 10 years (dollars)	Maximum amount ^a for workers with 30 or more years of coverage (dollars)
	Year	Amount (dollars)	January 1979	11.50
	1979	4,725	June 1979	^c 12.64
	1980	5,100	June 1980	^c 14.45
	1981	^d 5,550	June 1981	^c 16.07
	1982	6,075	June 1982	^c 17.26
	1983	6,675	December 1983	^c 17.86
	1984	7,050	December 1984	^c 18.49
	1985	7,425	December 1985	^c 19.06
	1986	7,875	December 1986	^c 19.31
	1987	8,175	December 1987	^c 20.12
	1988	8,400	December 1988	^c 20.92
	1989	8,925	December 1989	^c 21.90
	1990	9,525	December 1990	^c 23.08
			December 1991	^c 23.93
			December 1992	^c 24.65
			December 1993	^c 25.29
			December 1994	^c 26.00
			December 1995	^c 26.68
			December 1996	^c 27.45
			December 1997	^c 28.03
			December 1998	^c 28.39
			December 1999	^{c,e} 29.10
			December 2000	^c 30.12
			December 2001	^c 30.90
			December 2002	^c 31.33
			December 2003	^c 31.99
			December 2004	^c 32.85

(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		
		December 2005	^c 34.20	682.70
		December 2006	^c 35.33	705.20
		December 2007	^c 36.14	721.40
		December 2008	^c 38.24	763.20
		December 2009	^c 38.24	763.20
		December 2010	^c 38.24	763.20
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: ^f			
	<i>Year</i>	<i>Amount (dollars)</i>		
	1991	5,940		
	1992	6,210		
	1993	6,435		
	1994	6,750		
	1995	6,795		
	1996	6,975		
	1997	7,290		
	1998	7,605		
	1999	8,055		
	2000	8,505		
	2001	8,955		
	2002	9,450		
	2003	9,675		
	2004	9,765		
	2005	10,035		
	2006	10,485		
	2007	10,890		
	2008	11,385		
	2009	11,880		
	2010	11,880		
	2011	11,880		

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

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*.
- Revised data.
- 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.

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2.A OASDI: Benefit Computation and Automatic Adjustments

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

Eligibility year	Calculation of maximum family benefit (based on percentage of PIA) (dollars)				First applicable cost-of-living adjustment	
	150 percent of the first	Plus 272 percent of the next	Plus 134 percent of the next	Plus 175 percent of the amount above	Effective date	Percentage increase
1979	230	102	101	433	June 1979	9.9
1980	248	110	109	467	June 1980	14.3
1981	270	120	118	508	June 1981	11.2
1982	294	131	129	554	June 1982	7.4
1983	324	144	142	610	December 1983	3.5
1984	342	151	150	643	December 1984	3.5
1985	358	159	158	675	December 1985	3.1
1986	379	169	166	714	December 1986	1.3
1987	396	175	174	745	December 1987	4.2
1988	407	181	179	767	December 1988	4.0
1989	433	193	190	816	December 1989	4.7
1990	455	201	200	856	December 1990	5.4
1991	473	209	208	890	December 1991	3.7
1992	495	219	217	931	December 1992	3.0
1993	513	227	226	966	December 1993	2.6
1994	539	240	237	1,016	December 1994	2.8
1995	544	241	239	1,024	December 1995	2.6
1996	559	247	246	1,052	December 1996	2.9
1997	581	258	255	1,094	December 1997	2.1
1998	609	271	267	1,147	December 1998	1.3
1999	645	286	283	1,214	December 1999	^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	2.7
2005	801	355	352	1,508	December 2005	4.1
2006	838	372	368	1,578	December 2006	3.3
2007	869	386	381	1,636	December 2007	2.3
2008	909	403	399	1,711	December 2008	5.8
2009	950	422	417	1,789	December 2009	0.0
2010	972	431	427	1,830	December 2010	0.0
2011	957	425	421	1,803	December 2011	--

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

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.

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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, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

- 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: (410) 965-0090 or statistics@ssa.gov.

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A16—Percentage of average monthly wage (AMW) applicable to primary insurance amount (PIA) based on formula for computing PIA from AMW, and percentage increases in PIA

AMW (dollars)	April 1952	September 1952	September 1954	January 1959	January 1965	February 1968	January 1970	January 1971	September 1972	June 1974	June 1975	June 1976
First 110	^a 50.00	^a 55.00	55.00	58.85	62.97	71.16	81.83	90.01	108.01	119.89	129.48	137.77
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	47.10	50.10
Next 150	...	...	...	...	21.40	24.18	27.81	30.59	36.71	40.75	44.01	46.82
Next 100	...	...	...	...	...	28.43	32.69	35.96	43.15	47.90	51.73	55.05
Next 100	...	...	...	...	...	...	...	20.00	24.00	26.64	28.77	30.61
Next 250	...	...	...	...	...	...	...	...	^d 20.00	22.20	23.98	25.51
Next 175	...	...	...	...	...	...	...	...	...	^e 20.00	21.60	22.98
Next 100	...	...	...	...	...	...	...	...	...	...	20.00	21.28
Next 100	...	...	...	...	...	...	...	...	...	...	...	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	^l 8.0	6.4

(Continued)

Table 2.A16—Percentage of average monthly wage (AMW) applicable to primary insurance amount (PIA) based on formula for computing PIA from AMW, and percentage increases in PIA—Continued

AMW (dollars)	June 1977	June 1978	June 1979	June 1980	June 1981	June 1982	Dec. 1983	Dec. 1984	Dec. 1985	Dec. 1986	Dec. 1987	Dec. 1988
First 110	145.90	155.38	170.76	195.18	217.04	233.10	241.26	249.70	257.44	260.79	271.74	282.61
Next 290	53.06	56.51	62.10	70.98	78.93	84.77	87.74	90.81	93.62	94.84	98.82	102.77
Next 150	49.58	52.81	58.04	66.34	73.77	79.23	82.00	84.87	87.50	88.64	92.36	96.05
Next 100	58.30	62.09	68.24	78.00	86.74	93.16	96.42	99.79	102.88	104.22	108.60	112.94
Next 100	32.42	34.53	37.95	43.38	48.24	51.81	53.62	55.50	57.22	57.96	60.39	62.81
Next 250	27.02	28.78	31.63	36.15	40.20	43.17	44.68	46.24	47.67	48.29	50.32	52.33
Next 175	24.34	25.92	28.49	32.56	36.21	38.89	40.25	41.66	42.95	43.51	45.34	47.15
Next 100	22.54	24.01	26.39	30.16	33.54	36.02	37.28	38.58	39.78	40.30	41.99	43.67
Next 100	21.18	22.56	24.79	28.33	31.50	33.83	35.01	36.24	37.36	37.85	39.44	41.02
Next 100	20.00	21.30	23.41	26.76	29.76	31.96	33.08	34.24	35.30	35.76	37.26	38.75
Next 435	...	20.00	21.98	25.12	27.93	30.00	31.05	32.14	33.14	33.57	34.98	36.38
Next 250	...	...	20.00	22.86	25.42	27.30	28.26	29.25	30.16	30.55	31.83	33.10
Next 315	...	...	...	20.00	22.24	23.89	24.73	25.60	26.39	26.73	27.85	28.96
Next 225	...	...	...	...	20.00	21.48	22.23	23.01	23.72	24.03	25.04	26.04
Next 275	...	...	...	...	...	20.00	20.70	21.42	22.08	22.37	23.31	24.24
Next 175	...	...	...	...	...	...	20.00	20.70	21.34	21.62	22.53	23.43
Next 150	...	...	...	...	...	...	...	20.00	20.63	20.90	21.78	22.65
Next 200	...	...	...	...	...	...	...	...	20.00	20.26	21.11	21.95
Next 150	...	...	...	...	...	...	...	...	...	20.00	20.84	21.67
Next 100	...	...	...	...	...	...	...	...	...	...	20.00	20.80
Next 250	...	...	...	...	...	...	...	...	...	...	...	20.00
Percentage increase in PIA	5.9	6.5	9.9	14.3	11.2	7.4	3.5	3.5	3.1	1.3	4.2	4.0

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A16—Percentage of average monthly wage (AMW) applicable to primary insurance amount (PIA) based on formula for computing PIA from AMW, and percentage increases in PIA—Continued

AMW (dollars)	Dec. 1989	Dec. 1990	Dec. 1991	Dec. 1992	Dec. 1993	Dec. 1994	Dec. 1995	Dec. 1996	Dec. 1997	Dec. 1998	Dec. 1999	Dec. 2000
First 110	295.89	311.87	323.41	333.11	341.77	351.34	360.47	370.93	378.72	383.64	393.23	407.00
Next 290	107.60	113.42	117.62	121.15	124.30	127.78	131.10	134.90	137.73	139.52	143.01	148.02
Next 150	100.56	105.99	109.91	113.21	116.15	119.40	122.50	126.06	128.71	130.38	133.64	138.32
Next 100	118.25	124.64	129.25	133.13	136.59	140.41	144.06	148.24	151.35	153.32	157.15	162.65
Next 100	65.76	69.31	71.87	74.03	75.95	78.08	80.11	82.43	84.16	85.26	87.39	90.45
Next 250	54.79	57.75	59.89	61.69	63.29	65.06	66.75	68.69	70.13	71.04	72.82	75.37
Next 175	49.37	52.04	53.97	55.59	57.04	58.64	60.16	61.91	63.21	64.03	65.63	67.93
Next 100	45.72	48.19	49.97	51.47	52.81	54.29	55.70	57.32	58.52	59.28	60.77	62.89
Next 100	42.95	45.27	46.94	48.35	49.61	51.00	52.33	53.84	54.97	55.69	57.08	59.08
Next 100	40.57	42.76	44.34	45.67	46.86	48.17	49.42	50.86	51.93	52.60	53.92	55.81
Next 435	38.09	40.15	41.64	42.89	44.01	45.24	46.42	47.76	48.76	49.40	50.63	52.40
Next 250	34.66	36.53	37.88	39.02	40.03	41.15	42.22	43.44	44.35	44.93	46.05	47.66
Next 315	30.32	31.96	33.14	34.13	35.02	36.00	36.94	38.01	38.81	39.31	40.30	41.71
Next 225	27.26	28.73	29.79	30.68	31.48	32.36	33.20	34.16	34.88	35.33	36.21	37.48
Next 275	25.38	26.75	27.74	28.57	29.31	30.13	30.91	31.81	32.48	32.90	33.72	34.90
Next 175	24.53	25.85	26.81	27.61	28.33	29.12	29.88	30.74	31.39	31.79	32.59	33.73
Next 150	23.71	24.99	25.91	26.69	27.38	28.15	28.88	29.72	30.34	30.74	31.51	32.61
Next 200	22.98	24.22	25.12	25.87	26.54	27.28	27.99	28.80	29.40	29.79	30.53	31.60
Next 150	22.69	23.92	24.81	25.55	26.21	26.94	27.64	28.44	29.04	29.41	30.15	31.21
Next 100	21.78	22.96	23.81	24.52	25.16	25.86	26.53	27.30	27.87	28.24	28.94	29.95
Next 250	20.94	22.07	22.89	23.58	24.19	24.87	25.52	26.26	26.81	27.16	27.84	28.81
Next 275	20.00	21.08	21.86	22.52	23.11	23.76	24.38	25.08	25.61	25.94	26.59	27.52
Next 175	...	20.00	20.74	21.36	21.92	22.53	23.12	23.79	24.29	24.61	25.22	26.10
Next 175	...	...	20.00	20.60	21.14	21.73	22.29	22.94	23.42	23.73	24.32	25.17
Next 175	...	...	...	20.00	20.52	21.09	21.64	22.27	22.74	23.03	23.61	24.44
Next 250	...	...	...	...	20.00	20.56	21.09	21.71	22.17	22.45	23.02	23.82
Next 50	...	...	...	...	...	20.00	20.52	21.12	21.56	21.84	22.39	23.17
Next 125	...	...	...	...	...	...	20.00	20.58	21.01	21.29	21.82	22.58
Next 225	...	...	...	...	...	...	...	20.00	20.42	20.69	21.20	21.94
Next 250	...	...	...	...	...	...	...	...	20.00	20.26	20.77	21.49
Next 350	...	...	...	...	...	...	...	...	...	20.00	20.50	21.22
Next 300	...	...	...	...	...	...	...	...	...	...	20.00	20.70
Next 350	...	...	...	...	...	...	...	...	...	...	...	20.00
Percentage increase in PIA	4.7	5.4	3.7	3.0	2.6	2.8	2.6	2.9	2.1	1.3	^m 2.5	3.5

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A16—Percentage of average monthly wage (AMW) applicable to primary insurance amount (PIA) based on formula for computing PIA from AMW, and percentage increases in PIA—Continued

AMW (dollars)	Dec. 2001	Dec. 2002	Dec. 2003	Dec. 2004	Dec. 2005	Dec. 2006	Dec. 2007	Dec. 2008	Dec. 2009	Dec. 2010
First 110	417.58	423.43	432.32	443.99	462.19	477.45	488.43	516.76	516.76	516.76
Next 290	151.87	153.99	157.23	161.47	168.09	173.64	177.63	187.93	187.93	187.93
Next 150	141.91	143.90	146.92	150.89	157.08	162.26	165.99	175.62	175.62	175.62
Next 100	166.88	169.22	172.77	177.44	184.71	190.81	195.20	206.52	206.52	206.52
Next 100	92.80	94.10	96.07	98.67	102.71	106.10	108.54	114.84	114.84	114.84
Next 250	77.33	78.41	80.06	82.22	85.59	88.41	90.45	95.69	95.69	95.69
Next 175	69.70	70.67	72.16	74.10	77.14	79.69	81.52	86.25	86.25	86.25
Next 100	64.53	65.43	66.81	68.61	71.42	73.78	75.48	79.85	79.85	79.85
Next 100	60.61	61.46	62.75	64.44	67.09	69.30	70.89	75.01	75.01	75.01
Next 100	57.26	58.06	59.28	60.88	63.37	65.46	66.97	70.85	70.85	70.85
Next 435	53.77	54.52	55.66	57.17	59.51	61.47	62.89	66.54	66.54	66.54
Next 250	48.90	49.59	50.63	52.00	54.13	55.91	57.20	60.52	60.52	60.52
Next 315	42.79	43.39	44.30	45.50	47.36	48.92	50.05	52.95	52.95	52.95
Next 225	38.46	38.99	39.81	40.89	42.56	43.97	44.98	47.59	47.59	47.59
Next 275	35.81	36.31	37.07	38.08	39.64	40.94	41.89	44.32	44.32	44.32
Next 175	34.61	35.09	35.83	36.79	38.30	39.57	40.48	42.82	42.82	42.82
Next 150	33.46	33.93	34.64	35.57	37.03	38.25	39.13	41.40	41.40	41.40
Next 200	32.42	32.88	33.57	34.47	35.89	37.07	37.92	40.12	40.12	40.12
Next 150	32.02	32.46	33.15	34.04	35.44	36.61	37.45	39.62	39.62	39.62
Next 100	30.73	31.16	31.82	32.68	34.02	35.14	35.95	38.03	38.03	38.03
Next 250	29.56	29.98	30.61	31.43	32.72	33.80	34.58	36.58	36.58	36.58
Next 275	28.23	28.63	29.23	30.02	31.25	32.28	33.02	34.94	34.94	34.94
Next 175	26.78	27.16	27.73	28.48	29.64	30.62	31.33	33.14	33.14	33.14
Next 175	25.82	26.19	26.74	27.46	28.58	29.53	30.21	31.96	31.96	31.96
Next 175	25.07	25.42	25.96	26.66	27.75	28.67	29.32	31.03	31.03	31.03
Next 250	24.44	24.78	25.30	25.99	27.05	27.94	28.59	30.24	30.24	30.24
Next 50	23.78	24.11	24.62	25.28	26.32	27.18	27.81	29.42	29.42	29.42
Next 125	23.17	23.49	23.99	24.63	25.64	26.49	27.10	28.67	28.67	28.67
Next 225	22.52	22.83	23.31	23.94	24.92	25.74	26.34	27.86	27.86	27.86
Next 250	22.05	22.36	22.83	23.45	24.41	25.21	25.79	27.29	27.29	27.29
Next 350	21.77	22.07	22.54	23.15	24.09	24.89	25.46	26.94	26.94	26.94
Next 300	21.24	21.54	21.99	22.58	23.51	24.28	24.84	26.28	26.28	26.28
Next 350	20.52	20.81	21.24	21.82	22.71	23.46	24.00	25.39	25.39	25.39
Next 375	20.00	20.28	20.71	21.26	22.14	22.87	23.39	24.75	24.75	24.75
Next 175	...	20.00	20.42	20.97	21.83	22.55	23.07	24.41	24.41	24.41
Next 75	...	...	20.00	20.54	21.38	22.09	22.60	23.91	23.91	23.91
Next 175	...	...	...	20.00	20.82	21.51	22.00	23.28	23.28	23.28
Next 350	...	...	...	...	20.00	20.66	21.14	22.36	22.36	22.36
Next 275	...	...	...	...	...	20.00	20.46	21.65	21.65	21.65
Next 375	...	...	...	...	...	...	20.00	21.16	21.16	21.16
Next 400	...	...	...	...	...	...	...	20.00	20.00	20.00
Percentage increase in PIA	2.6	1.4	2.1	2.7	4.1	3.3	2.3	5.8	0.0	0.0

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

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

... = 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 (COLAs).

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A16—Percentage of average monthly wage (AMW) applicable to primary insurance amount (PIA) based on formula for computing PIA from AMW, and percentage increases in PIA—*Continued*

- m. The 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: (410) 965-0090 or statistics@ssa.gov.

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
	December 2004	347.00	434.3% of first \$436 + 216.9% of next \$191 ^b	150% of PIA
	December 2005	361.20	452.1% of first \$436 + 225.8% of next \$191 ^b	150% of PIA
	December 2006	373.10	467.0% of first \$436 + 233.3% of next \$191 ^b	150% of PIA
	December 2007	381.60	477.7% of first \$436 + 238.7% of next \$191 ^b	150% of PIA
December 2008	403.70	505.4% of first \$436 + 252.5% of next \$191 ^b	150% of PIA	
December 2009	403.70	505.4% of first \$436 + 252.5% of next \$191 ^b	150% of PIA	
December 2010	403.70	505.4% of first \$436 + 252.5% of next \$191 ^b	150% of PIA	

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

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

- Based on earnings; subject to reduction if claimed before age 65.
- For AMW of \$628 or more, 175 percent of PIA.
- Superseded by legislation in 1973.
- 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.)
- Superseded by legislation in 1981 that restored the minimum PIA for these groups.
- Minimum PIA eliminated by legislation in 1981.
- 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: (410) 965-0090 or statistics@ssa.gov.

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, 2010; 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 the Social Security Program Rules page (<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.

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A17.2—Full retirement age and maximum reduction of widow(er)s' benefits, by year of birth

Year of birth ^a	Year of attainment of age 60	Year of attainment of age 65	Full retirement age	Maximum reduction months	Monthly reduction ^b
1939 or earlier	1999 and earlier	2004 and earlier	65 years	60	0.475
1940	2000	2005	65 years and 2 months	62	0.460
1941	2001	2006	65 years and 4 months	64	0.445
1942	2002	2007	65 years and 6 months	66	0.432
1943	2003	2008	65 years and 8 months	68	0.419
1944	2004	2009	65 years and 10 months	70	0.407
1945–1956	2005–2016	2010–2021	66 years	72	0.396
1957	2017	2022	66 years and 2 months	74	0.385
1958	2018	2023	66 years and 4 months	76	0.375
1959	2019	2024	66 years and 6 months	78	0.365
1960	2020	2025	66 years and 8 months	80	0.356
1961	2021	2026	66 years and 10 months	82	0.348
1962 or later	2022 and later	2027 and later	67 years	84	0.339

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

NOTES: 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).

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

b. Monthly reduction percentages are approximate due to rounding. For survivors whose full retirement age (FRA) 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 primary insurance amount (PIA), with a maximum reduction of 28.5 percent at age 60. For survivors whose FRA is older than 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.

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2.A OASDI: Benefit Computation and Automatic Adjustments

Table 2.A18—Automatic adjustment provisions

Year enacted	Provision
	<i>Quarter of coverage</i>
1977	Mandatory annual determination, beginning in 1978, as to whether an adjustment is required in the amount of wages and self-employment earnings an individual needs in order to be credited with a quarter of coverage (QC) in the succeeding year. The amount required for a QC is the product of \$250 (in effect in 1978) multiplied by the following quotient: the national average wage for the year before the year of determination, divided by the average wage for 1976 (see Table 2.A8 for average annual wages after 1950). The resulting product, rounded to the nearest multiple of \$10, is the new amount required for a QC. In no case, however, is the new amount reduced below the amount in effect in the year of determination.
	<i>Maximum amount of taxable and creditable earnings</i>
1972	The 1972 Act (as modified by the legislation in 1973) mandated a determination in 1974, and in every subsequent year in which a cost-of-living benefit increase is established, as to whether an adjustment is required in the maximum amount of annual earnings that will be taxed and credited toward benefits. The determination in the years after 1975 is made by multiplying the "maximum" in effect in the year of determination by the following quotient: the national average wage for the year before the year of determination, divided by the average wage for the year before the most recent year in which an automatic determination was made that resulted in an increase or in which an increase in the maximum was enacted. (See Table 2.A8 for annual amounts of the average wage after 1950). The resulting product, rounded to the nearest multiple of \$300, is the new maximum amount of taxable and creditable earnings, effective with respect to remuneration paid after the year of determination and with respect to taxable years beginning after that year. In no case, however, is the maximum reduced to an amount below the maximum in the year of determination.
1976	In the 1974 and 1975 determinations, the quotient was the average wage for the year of determination, estimated from data for the first calendar quarter, divided by the corresponding amount for the year before the year of determination. Public Law (P.L.) 94-202 (signed January 2, 1976) revised the adjustment method by increasing by a year the lag in average wages used in the computation. Thus, for example, the determination in 1976 was based on the percentage increase in the average wage from 1974 to 1975.
1977	Statutory in lieu of automatic increases in the maximum instituted for 1979, 1980, and 1981. Also, for purposes of establishing a "year of coverage" used in the computation of the special minimum primary insurance amount (PIA), annual maximum taxable and creditable earnings after 1978 are the amounts that would have been determined under the automatic adjustment provisions if the statutory increases in the maximum under the 1977 Act had not been enacted (see Table 2.A12).
1989	Automatic increases in the maximum for 1990, 1991, and 1992 determined under a transitional rule, specified by the Omnibus Budget Reconciliation Act of 1989, for computing "deemed" average annual wage for 1988, 1989, and 1990. The purpose of the legislation was to include contributions to certain "deferred compensation" plans, most importantly section 401(k) pension plans, in the average annual average wage.
1994	The determination for years after 1994 is made by multiplying \$60,600, the "maximum" for 1994, by the following quotient: the national average wage index for the year before the year in which the determination is made, divided by the national average wage index for 1992. (See Table 2.A8 for annual amounts of the national average wage index.) The resulting product, rounded to the nearest \$300, is the new maximum amount of taxable and creditable earnings, effective with respect to remuneration paid in (and taxable years beginning in) the year following the year the determination is made. In no case, however, is the new maximum reduced to an amount below the maximum in the year of determination.
	<i>Benefits Computation</i>
1977	New benefit computation method based on average indexed monthly earnings (AIME) after 1950, effective for workers first eligible after 1978. Provision for automatic adjustment of the dollar amounts, or bend points, defining (1) the AIME brackets in the PIA formula (see Table 2.A11) and (2) the PIA brackets in the maximum family benefit formula (see Table 2.A13). New bend points are established by multiplying the bend points in effect in 1979—\$180 and \$1,085 for the PIA formula and \$230, \$332, and \$433 for the maximum family benefit formula—by the following quotient: the national average wage for the second year before the year for which the determination was made, divided by the average wage for 1977 (see Table 2.A8 for average annual wages after 1950). The resulting products, rounded to the nearest dollar, are the new bend points.
1980	Modified maximum family benefit formula applicable to workers with initial entitlement to disability benefits in or after July 1980 (see Table 2.A14). New formula for disabled workers has no bend points subject to automatic adjustment.
	<i>Cost-of-living increase</i>
1972	Under the original provisions (based on 1972 and 1973 legislation), the arithmetical mean of the Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W) 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 (COLA). 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 COLA 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 COLA for December 1999 was originally determined to be 2.4 percent, based on the CPI. The underlying CPI was later recomputed by the Bureau of Labor Statistics (BLS); 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 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.
2007	The rules for calculating automatic cost-of-living increases to PIAs under title II of the Social Security Act (the Act) were revised. The arithmetical mean of the CPI for each month is computed for the beginning and ending quarters of the measuring period, and the result is rounded to the same number of decimal places as the published CPI figures. Through December 2006, BLS published CPI figures rounded to the nearest one-tenth of 1 percent. BLS began publishing CPI figures rounded to the nearest one-thousandth of 1 percent in January 2007.
	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 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. 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 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	P.L. 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	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. P.L. 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, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

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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	Aug. 1950	Sept. 1950	Sep. 1952	Sept. 1954	Jan. 1959	Jan. 1965	Feb. 1968	Jan. 1970	Jan. 1971	Sept. 1972	June 1974	June 1975	June 1976	June 1977	June 1978	June 1979
August 1950	100	177	199	225	241	258	291	335	368	442	491	530	564	597	636	699
September 1950	...	100	113	127	136	146	164	189	208	250	277	299	318	337	359	395
September 1952	100	113	121	129	146	168	185	222	246	266	283	300	319	351
September 1954	100	107	114	129	149	164	196	218	235	250	265	283	310
January 1959	100	107	121	139	153	184	204	220	234	248	264	290
January 1965	100	113	130	143	172	190	206	219	232	247	271
February 1968	100	115	127	152	168	182	194	205	218	240
January 1970	100	110	132	147	158	168	178	190	209
January 1971	100	120	133	144	153	162	173	190
September 1972	100	111	120	128	135	144	158
June 1974	100	108	115	122	130	142
June 1975	100	106	113	120	132
June 1976	100	106	113	124
June 1977	100	107	117
June 1978	100	110
June 1979	100
Cost-of-living adjustment	...	^a 77.0	12.5	13.0	7.0	7.0	13.0	15.0	10.0	20.0	11.0	8.0	6.4	5.9	6.5	9.9

(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 1980	June 1981	June 1982	Dec. 1983	Dec. 1984	Dec. 1985	Dec. 1986	Dec. 1987	Dec. 1988	Dec. 1989	Dec. 1990	Dec. 1991	Dec. 1992	Dec. 1993	Dec. 1994	Dec. 1995
August 1950	799	888	954	987	1,022	1,053	1,067	1,112	1,156	1,211	1,276	1,323	1,363	1,398	1,437	1,475
September 1950	451	502	539	558	577	595	603	628	653	684	721	748	770	790	812	833
September 1952	401	446	479	496	513	529	536	558	581	608	641	665	684	702	722	741
September 1954	355	395	424	439	454	468	474	494	514	538	567	588	606	621	639	655
January 1959	332	369	396	410	424	437	443	462	480	503	530	550	566	581	597	613
January 1965	310	345	370	383	397	409	414	432	449	470	495	514	529	543	558	573
February 1968	274	305	328	339	351	362	367	382	397	416	438	455	468	480	494	507
January 1970	239	265	285	295	305	315	319	332	345	362	381	395	407	418	429	441
January 1971	217	241	259	268	277	286	290	302	314	329	347	359	370	380	390	401
September 1972	181	201	216	223	231	238	241	252	262	274	289	299	308	316	325	334
June 1974	163	181	194	201	208	215	218	227	236	247	260	270	278	285	293	301
June 1975	151	168	180	186	193	199	201	210	218	229	241	250	257	264	271	278
June 1976	142	158	169	175	181	187	189	197	205	215	226	235	242	248	255	262
June 1977	134	149	160	165	171	176	179	186	194	203	214	222	228	234	241	247
June 1978	126	140	150	155	161	166	168	175	182	190	201	208	214	220	226	232
June 1979	114	127	137	141	146	151	153	159	166	173	183	189	195	200	206	211
June 1980	100	111	119	124	128	132	134	139	145	152	160	166	171	175	180	185
June 1981	...	100	107	111	115	119	120	125	130	136	144	149	153	157	162	166
June 1982	...	...	100	104	107	110	112	117	121	127	134	139	143	147	151	155
December 1983	...	...	...	100	104	107	108	113	117	123	129	134	138	142	146	149
December 1984	...	...	...	...	100	103	104	109	113	118	125	130	133	137	141	144
December 1985	...	...	...	...	...	100	101	106	110	115	121	126	129	133	136	140
December 1986	...	...	...	...	...	...	100	104	108	113	120	124	128	131	135	138
December 1987	...	...	...	...	...	...	...	100	104	109	115	119	123	126	129	133
December 1988	...	...	...	...	...	...	...	...	100	105	110	114	118	121	124	128
December 1989	...	...	...	...	...	...	...	...	...	100	105	109	113	116	119	122
December 1990	...	...	...	...	...	...	...	...	...	...	100	104	107	110	113	116
December 1991	...	...	...	...	...	...	...	...	...	...	...	100	103	106	109	111
December 1992	...	...	...	...	...	...	...	...	...	...	...	...	100	103	105	108
December 1993	...	...	...	...	...	...	...	...	...	...	...	...	...	100	103	105
December 1994	...	...	...	...	...	...	...	...	...	...	...	...	...	...	100	103
December 1995	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	100
Cost-of-living adjustment	14.3	11.2	7.4	3.5	3.5	3.1	1.3	4.2	4.0	4.7	5.4	3.7	3.0	2.6	2.8	2.6

(Continued)

2.A OASDI: Benefit Computation and Automatic Adjustments

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

Base date	Dec. 1996	Dec. 1997	Dec. 1998	Dec. 1999	Dec. 2000	Dec. 2001	Dec. 2002	Dec. 2003	Dec. 2004	Dec. 2005	Dec. 2006	Dec. 2007	Dec. 2008	Dec. 2009	Dec. 2010
August 1950	1,518	1,549	1,570	1,609	1,665	1,708	1,732	1,769	1,817	1,890	1,953	1,997	2,112	2,112	2,112
September 1950	857	875	887	909	941	965	979	999	1,026	1,067	1,102	1,127	1,192	1,192	1,192
September 1952	762	778	788	808	836	858	870	888	912	949	981	1,003	1,061	1,061	1,061
September 1954	674	689	698	715	740	759	770	786	807	839	867	886	937	937	937
January 1959	630	644	652	668	692	710	720	735	754	785	811	829	877	877	877
January 1965	589	601	609	625	646	663	672	687	705	733	758	775	819	819	819
February 1968	521	532	539	553	572	587	595	608	624	649	670	685	724	724	724
January 1970	453	463	469	481	497	510	517	528	543	563	582	595	629	629	629
January 1971	412	421	426	437	452	464	470	480	493	512	529	541	572	572	572
September 1972	343	351	355	364	377	387	392	400	411	428	442	451	477	477	477
June 1974	309	316	320	328	339	348	353	361	370	385	398	406	429	429	429
June 1975	286	292	296	304	314	323	327	334	343	356	368	376	397	397	397
June 1976	269	275	278	285	295	303	307	314	322	335	346	353	373	373	373
June 1977	254	260	263	270	279	286	290	296	304	316	327	334	353	353	353
June 1978	239	244	247	253	262	269	273	278	286	296	306	312	330	330	330
June 1979	217	222	225	230	238	245	248	253	260	269	278	284	300	300	300
June 1980	190	194	197	201	209	214	217	222	227	235	243	248	262	262	262
June 1981	171	174	177	181	188	192	195	199	205	213	220	224	236	236	236
June 1982	159	162	165	169	175	179	182	185	190	197	203	207	219	219	219
December 1983	154	157	159	163	169	173	176	179	184	190	197	201	212	212	212
December 1984	149	152	154	157	163	167	170	173	178	184	190	194	205	205	205
December 1985	144	147	149	153	158	162	164	168	172	179	184	188	198	198	198
December 1986	142	145	147	151	156	160	162	166	170	176	182	186	196	196	196
December 1987	137	139	141	145	150	154	156	159	163	169	174	178	188	188	188
December 1988	131	134	136	139	144	148	150	153	157	163	168	171	180	180	180
December 1989	125	128	130	133	138	141	143	146	150	156	161	164	173	173	173
December 1990	119	121	123	126	131	134	136	139	142	148	152	155	163	163	163
December 1991	115	117	119	122	126	129	131	134	137	142	147	150	158	158	158
December 1992	111	114	115	118	122	125	127	130	133	138	142	145	153	153	153
December 1993	109	111	112	115	119	122	124	126	130	135	139	142	150	150	150
December 1994	106	108	109	112	116	119	121	123	126	131	136	138	146	146	146
December 1995	103	105	106	109	113	116	117	120	123	127	131	134	141	141	141
December 1996	100	102	103	106	110	113	114	117	120	124	128	131	138	138	138
December 1997	...	100	101	104	107	110	112	114	117	122	126	128	135	135	135
December 1998	...	...	100	103	106	109	110	113	116	120	124	126	133	133	133
December 1999	...	...	...	100	104	106	108	110	113	116	120	123	130	130	130
December 2000	...	...	...	...	100	103	104	106	109	113	117	119	125	125	125
December 2001	...	...	...	...	...	100	101	104	106	110	114	116	122	122	122
December 2002	...	...	...	...	...	...	100	102	105	109	113	115	121	121	121
December 2003	...	...	...	...	...	...	...	100	103	107	110	112	118	118	118
December 2004	...	...	...	...	...	...	...	...	100	104	108	110	116	116	116
December 2005	...	...	...	...	...	...	...	...	...	100	103	105	111	111	111
December 2006	...	...	...	...	...	...	...	...	...	...	100	102	107	107	107
December 2007	...	...	...	...	...	...	...	...	...	...	...	100	105	105	105
December 2008	...	...	...	...	...	...	...	...	...	...	...	...	100	100	100
December 2009	...	...	...	...	...	...	...	...	...	...	...	...	...	100	100
December 2010	...	...	...	...	...	...	...	...	...	...	...	...	...	...	100
Cost-of-living adjustment	2.9	2.1	1.3	^b 2.5	3.5	2.6	1.4	2.1	2.7	4.1	3.3	2.3	5.8	0.0	0.0

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

NOTES: Growth reflects cost-of-living adjustments only. The amounts shown in the are computed using unrounded data, with results rounded to the nearest dollar.

... = not applicable.

- Average increase in benefits of about 77 percent—from 100 percent at the lowest level to 50 percent at the highest level.
- The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.

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

Year enacted	Age	Percentage of PIA	Condition or qualification																																	
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 percent for each month under age 65.																																	
1961	Men: 62–64	...	Reduced 5/9 of 1 percent for each month under age 65.																																	
1972	Increased 1/12 of 1 percent 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 percent 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 2000, the age at which 100 percent of PIA is payable will be gradually increased, as follows: <table style="margin-left: 40px; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><i>Applicable PIA payable at age—</i></th> <th style="text-align: left;"><i>Applicable to workers who attain age 62 in—</i></th> </tr> </thead> <tbody> <tr><td>65 and 2 months</td><td>2000</td></tr> <tr><td>65 and 4 months</td><td>2001</td></tr> <tr><td>65 and 6 months</td><td>2002</td></tr> <tr><td>65 and 8 months</td><td>2003</td></tr> <tr><td>65 and 10 months</td><td>2004</td></tr> <tr><td>66</td><td>2005–2016</td></tr> <tr><td>66 and 2 months</td><td>2017</td></tr> <tr><td>66 and 4 months</td><td>2018</td></tr> <tr><td>66 and 6 months</td><td>2019</td></tr> <tr><td>66 and 8 months</td><td>2020</td></tr> <tr><td>66 and 10 months</td><td>2021</td></tr> <tr><td>67</td><td>2022 and later</td></tr> </tbody> </table>	<i>Applicable PIA payable at age—</i>	<i>Applicable to workers who attain age 62 in—</i>	65 and 2 months	2000	65 and 4 months	2001	65 and 6 months	2002	65 and 8 months	2003	65 and 10 months	2004	66	2005–2016	66 and 2 months	2017	66 and 4 months	2018	66 and 6 months	2019	66 and 8 months	2020	66 and 10 months	2021	67	2022 and later							
<i>Applicable PIA payable at age—</i>	<i>Applicable to workers who attain age 62 in—</i>																																			
65 and 2 months	2000																																			
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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 percent for each of the first 36 months of receipt of benefits immediately preceding the age at which 100 percent of PIA is payable, plus 5/12 of 1 percent 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 percent of PIA is payable and age 70 in which no benefits are received: <table style="margin-left: 40px; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><i>Age 62 in years—</i></th> <th style="text-align: left;"><i>Rate of increase</i></th> <th style="text-align: left;"><i>Annual rate (percent)</i></th> </tr> </thead> <tbody> <tr><td>1987–1988</td><td>7/24 of 1 percent</td><td>3.5</td></tr> <tr><td>1989–1990</td><td>8/24 of 1 percent</td><td>4</td></tr> <tr><td>1991–1992</td><td>9/24 of 1 percent</td><td>4.5</td></tr> <tr><td>1993–1994</td><td>10/24 of 1 percent</td><td>5</td></tr> <tr><td>1995–1996</td><td>11/24 of 1 percent</td><td>5.5</td></tr> <tr><td>1997–1998</td><td>12/24 of 1 percent</td><td>6</td></tr> <tr><td>1999–2000</td><td>13/24 of 1 percent</td><td>6.5</td></tr> <tr><td>2001–2002</td><td>14/24 of 1 percent</td><td>7</td></tr> <tr><td>2003–2004</td><td>15/24 of 1 percent</td><td>7.5</td></tr> <tr><td>2005 and later</td><td>16/24 of 1 percent</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 percent	3.5	1989–1990	8/24 of 1 percent	4	1991–1992	9/24 of 1 percent	4.5	1993–1994	10/24 of 1 percent	5	1995–1996	11/24 of 1 percent	5.5	1997–1998	12/24 of 1 percent	6	1999–2000	13/24 of 1 percent	6.5	2001–2002	14/24 of 1 percent	7	2003–2004	15/24 of 1 percent	7.5	2005 and later	16/24 of 1 percent	8
<i>Age 62 in years—</i>	<i>Rate of increase</i>	<i>Annual rate (percent)</i>																																		
1987–1988	7/24 of 1 percent	3.5																																		
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1991–1992	9/24 of 1 percent	4.5																																		
1993–1994	10/24 of 1 percent	5																																		
1995–1996	11/24 of 1 percent	5.5																																		
1997–1998	12/24 of 1 percent	6																																		
1999–2000	13/24 of 1 percent	6.5																																		
2001–2002	14/24 of 1 percent	7																																		
2003–2004	15/24 of 1 percent	7.5																																		
2005 and later	16/24 of 1 percent	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 percent 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 percent 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 percent 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, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

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

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

Year enacted	Age	Percentage of PIA	Condition or qualification
<i>Wife</i>			
1939	65 or older	50	Fully insured.
1956	62–64	...	Reduced 25/36 of 1 percent 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 2000, the age at which 50 percent of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1 percent for each of the first 36 months under the age at which 50 percent of PIA is payable, plus 5/12 of 1 percent 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 percent 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 2000, the age at which 50 percent of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1 percent for each of the first 36 months under the age at which 50 percent of PIA is payable, plus 5/12 of 1 percent 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 percent 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 2000, the age at which 50 percent of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1 percent for each of the first 36 months under the age at which 50 percent of PIA is payable, plus 5/12 of 1 percent 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 percent 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 2000, the age at which 50 percent of PIA is payable will be gradually increased (see Table 2.A20).
	62–66	...	Reduced 25/36 of 1 percent for each of the first 36 months under the age at which 50 percent of PIA is payable, plus 5/12 of 1 percent 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
<i>Husband (father)</i>			
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, 2010; 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 the Social Security Program Rules page (<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 percent 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 percent of PIA.																									
	60–64	...	Reduced 19/40 of 1 percent 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 percent 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 2000, the age at which 100 percent 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
<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 percent of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2 percent 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 percent, plus 43/198 of 1 percent for each month under age 60. Includes divorced wife, dependent and married 20 years.																									
1972	...	100	Reduced 28 1/2 percent, plus 43/240 of 1 percent 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 percent 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 percent of PIA.																									
	60–64	...	Reduced 19/40 of 1 percent 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 percent 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 2000, the age at which 100 percent 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 percent of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2 percent 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 percent, plus 43/198 of 1 percent for each month under age 62.
1972	...	100	Reduced 28 1/2 percent, plus 43/240 of 1 percent 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.

(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			
1939	Under 18	50	Fully or currently insured. ^a Student aged 16–17.
1946	...	...	Student requirement eliminated.
1950	...	...	Plus 25 percent of PIA divided among the children.
1960	...	75	Additional 25 percent of PIA eliminated.
1965	...	...	Full-time student.
1972	...	...	Benefits extended to end of quarter or semester in which 22nd birthday occurs while undergraduate student.
	...	...	Includes grandchild under certain circumstances.
1981	18–22	...	Student category eliminated (to be phased out gradually for those entitled before May 1982), except for elementary or secondary school students under age 19.
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 percent of PIA divided among the children.
1960	...	75	Additional 25 percent 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 percent 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 percent of PIA.
	60–64	...	Reduced 19/40 of 1 percent 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 percent 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 2000, the age at which 100 percent 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 percent of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2 percent at age 60.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.

(Continued)

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

Year enacted	Age	Percentage of PIA	Condition or qualification
Disabled widower			
1967	50–61	82.5	Fully insured. Dependent. Reduced 5/9 of 1 percent per month between ages 60–62, plus 43/198 of 1 percent for each month under age 60.
1972	50–59	100	Reduced 28 1/2 percent, plus 43/240 of 1 percent for each month under age 60. Disability requirement eliminated for ages 60–61.
	...	...	Dependency requirement eliminated.
1977	...	...	Increased by any delayed retirement increment wife would be receiving.
	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982, dependent, and not remarried before age 60.
1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
	...	...	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 percent 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 percent 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 percent 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 2000, the age at which 100 percent 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 percent of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2 percent 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 percent, plus 43/240 of 1 percent 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.

(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
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, 2010; 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 the Social Security Program Rules page (<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: (410) 965-0090 or statistics@ssa.gov.

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, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

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2.A OASDI: Benefit Types and Levels

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	...

(Continued)

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

Year enacted	Effective date	Age	Amount ^a (dollars)	
			Individual	Couple
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	...
	December 2004	...	237.70	...
	December 2005	...	247.40	...
	December 2006	...	255.50	...
	December 2007	...	261.30	...
	December 2008	...	276.40	...
	December 2009	...	276.40	...
	December 2010	...	276.40	...

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

NOTE: ... = not applicable.

- a. Monthly benefit reduced by amount of any government pension excluding workers' compensation benefits and veterans' compensation for service-connected disability or death. Not available for persons receiving assistance.
- b. Provision for future automatic cost-of-living adjustments (COLAs).
- c. Suspended by legislation in 1973.
- d. Beginning June 1975, subject to automatic COLAs. Benefits no longer available to persons receiving payments under the Supplemental Security Income program.
- e. Separate rate for couples eliminated. Rate for individuals applied to all beneficiaries.
- f. Effective for applications after November 5, 1990.
- g. The 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: (410) 965-0090 or statistics@ssa.gov.

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. ^a
<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, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

NOTE: OASDI = Old-Age, Survivors, and Disability Insurance; PIA = Primary Insurance Amount.

a. The amount of the lump sum is effectively fixed at \$255 because of increases in the pre-1981 PIA. The 1981 legislation eliminating the minimum PIA is not applicable to the calculation of the lump-sum death payment.

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Table 2.A26—Monthly benefit amount for selected beneficiary families with first eligibility in 2010, by average indexed monthly earnings for stipulated yearly wage levels, effective December 2010 (in dollars)

Beneficiary family	Federal minimum wage ^a	75 percent of average wage	Average wage ^b	150 percent of average wage	Maximum taxable earnings ^c
<i>Retired-worker families^d</i>					
Average indexed monthly earnings	1,443.00	2,583.00	3,444.00	5,166.00	7,949.00
Primary insurance amount	903.10	1,267.90	1,543.40	1,995.90	2,413.30
Maximum family benefit	1,354.60	2,262.80	2,818.40	3,492.80	4,223.20
Monthly benefit amount for retired worker claiming benefits at age 62					
Worker alone	677.00	950.00	1,157.00	1,496.00	1,809.00
Worker with spouse claiming benefits at—					
Full retirement age or older ^e	1,128.00	1,583.00	1,928.00	2,493.00	3,015.00
Age 62	993.00	1,393.00	1,697.00	2,194.00	2,653.00
<i>Survivor families^f</i>					
Average indexed monthly earnings	1,223.00	2,583.00	3,444.00	5,166.00	8,557.00
Primary insurance amount	832.70	1,267.90	1,543.40	1,995.90	2,504.50
Maximum family benefit	1,249.00	2,262.80	2,818.40	3,492.80	4,382.80
Monthly benefit amount for survivor of worker deceased at age 40					
1 surviving child	624.00	950.00	1,157.00	1,496.00	1,878.00
Widowed mother or father and 1 child	1,248.00	1,900.00	2,314.00	2,992.00	3,756.00
Widowed mother or father and 2 children	1,248.00	2,262.00	2,817.00	3,492.00	4,380.00
<i>Disabled-worker families^g</i>					
Average indexed monthly earnings	1,294.00	2,583.00	3,444.00	5,166.00	8,430.00
Primary insurance amount	855.40	1,267.90	1,543.40	1,995.90	2,485.50
Maximum family benefit ^h	1,099.90	1,901.80	2,315.10	2,993.80	3,728.20
Monthly benefit amount for disabled worker age 50					
Worker alone	855.00	1,267.00	1,543.00	1,995.00	2,485.00
Worker, spouse, and 1 child	1,099.00	1,899.00	2,313.00	2,991.00	3,727.00

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

- 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 2010 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 2010 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 2010, 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.

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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, 1957–2011 (in dollars)

Year ^a	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2010 ^b	At retirement		Effective December 2010 ^b	
			Men	Women	Men	Women
1957	24.00	380.10	...	86.80	...	937.70
1958	24.00	380.10	...	86.80	...	937.70
1959	26.40	380.10	...	92.80	...	937.70
1960	26.40	378.50	...	95.20	...	961.80
1961	26.40	376.50	...	96.00	...	968.70
1962	32.00	375.20	93.60	96.80	944.70	977.30
1963	32.00	373.40	94.40	97.60	951.30	983.90
1964	32.00	373.40	95.20	98.40	957.40	990.20
1965	35.20	373.00	102.80	105.40	962.70	988.20
1966	35.20	369.70	102.80	106.20	959.50	991.60
1967	35.20	367.60	105.40	108.80	980.80	1,011.80
1968	^c 44.00	362.70	^c 121.00	^c 124.80	985.70	1,018.10
1969	44.00	359.20	124.80	128.40	1,007.20	1,036.70
1970	51.20	354.10	146.80	151.90	1,016.90	1,051.90
1971	56.40	349.40	163.60	170.50	1,015.20	1,059.00
1972	56.40	344.40	167.10	172.90	1,023.50	1,058.80
1973	67.60	339.70	207.60	212.90	1,042.50	1,070.20
1974	67.60	334.20	217.00	219.70	1,074.70	1,087.60
1975	75.10	329.80	253.10	253.10	1,112.60	1,112.60
1976	81.20	325.90	285.60	285.60	1,148.80	1,148.80
1977	86.40	323.50	319.40	319.40	1,199.30	1,199.30
1978	91.50	322.00	354.60	354.60	1,254.30	1,254.30
1979	97.60	323.30	^d 388.90	^d 388.90	1,292.00	1,292.00
1980	97.60	293.80	^d 402.80	^d 402.80	1,217.40	1,217.40
1981	97.60	256.60	432.00	432.00	1,141.80	1,141.80
1982	^e	^e	474.60	474.60	1,128.40	1,128.40
1983	^e	^e	526.40	526.40	1,164.90	1,164.90
1984	^e	^e	559.40	559.40	1,196.30	1,196.30
1985	^e	^e	591.30	591.30	1,222.30	1,222.30
1986	^e	^e	630.50	630.50	1,264.00	1,264.00
1987	^e	^e	662.10	662.10	1,310.40	1,310.40
1988	^e	^e	686.70	686.70	1,304.50	1,304.50
1989	^e	^e	734.00	734.00	1,340.40	1,340.40
1990	^e	^e	774.60	774.60	1,351.40	1,351.40
1991	^e	^e	810.00	810.00	1,340.60	1,340.60
1992	^e	^e	854.10	854.10	1,363.70	1,363.70
1993	^e	^e	893.60	893.60	1,385.30	1,385.30
1994	^e	^e	948.00	948.00	1,432.40	1,432.40
1995	^e	^e	965.90	965.90	1,419.90	1,419.90
1996	^e	^e	999.90	999.90	1,432.60	1,432.60
1997	^e	^e	1,049.10	1,049.10	1,461.00	1,461.00
1998	^e	^e	1,109.60	1,109.60	1,513.50	1,513.50
1999	^e	^e	1,183.60	1,183.60	^f 1,593.70	^f 1,593.70

(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, 1957–2011 (in dollars)—Continued

Year ^a	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2010 ^b	At retirement		Effective December 2010 ^b	
			Men	Women	Men	Women
2000	e	e	1,241.70	1,241.70	1,631.20	1,631.20
2001	e	e	1,307.30	1,307.30	1,659.20	1,659.20
2002	e	e	1,375.30	1,375.30	1,701.50	1,701.50
2003	e	e	1,404.30	1,404.30	1,713.50	1,713.50
2004	e	e	1,414.80	1,414.80	1,690.80	1,690.80
2005	e	e	1,444.90	1,444.90	1,681.50	1,681.50
2006	e	e	1,522.50	1,522.50	1,702.10	1,702.10
2007	e	e	1,589.40	1,589.40	1,720.20	1,720.20
2008	e	e	1,672.70	1,672.70	1,769.70	1,769.70
2009	e	e	1,759.70	1,759.70	1,759.70	1,759.70
2010	e	e	1,809.90	1,809.90	1,809.90	1,809.90
2011	e	e	1,793.60	1,793.60	...	...

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

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

... = not applicable.

- Assumes the worker began to work at age 22, retired at the beginning of the year, had no prior disability, and received the maximum reduction. Through 1999, the assumed reduction was 36 months at 5/9 of 1 percent per month, or 20 percent. In 2000, with the increase in the full retirement age (FRA) to 65 and 2 months, the reduction increased to 20.008333 percent (see Tables 2.A17.1 and 2.A20). In 2001, the FRA increased to 65 and 4 months for a maximum reduction of 21.666667 percent. In 2002, the FRA increased to 65 and 6 months for a maximum reduction of 22.5 percent. In 2003, the FRA increased to 65 and 8 months for a maximum reduction of 23.333333 percent. In 2004, the FRA increased to 65 and 10 months for a maximum reduction of 24.16667 percent. In 2005, the FRA increased to 66 for a maximum reduction of 25 percent.
- Final benefit amount payable after Supplementary Medical Insurance (SMI) premium or any other deduction is rounded to next lower \$1.
- Effective February 1968.
- Derived from transitional guarantee computation based on primary insurance amount (PIA) table of 1978.
- 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.)
- 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.A28—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 65, by year they attained age 65, 1940–2011 (in dollars)

Year ^a	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2010 ^b	At retirement		Effective December 2010 ^b	
			Men	Women	Men	Women
1940	10.00	403.40	41.20	41.20	782.20	782.20
1941	10.00	403.40	41.60	41.60	782.20	782.20
1942	10.00	403.40	42.00	42.00	791.50	791.50
1943	10.00	403.40	42.40	42.40	791.50	791.50
1944	10.00	403.40	42.80	42.80	791.50	791.50
1945	10.00	403.40	43.20	43.20	800.10	800.10
1946	10.00	403.40	43.60	43.60	809.80	809.80
1947	10.00	403.40	44.00	44.00	817.30	817.30
1948	10.00	403.40	44.40	44.40	817.30	817.30
1949	10.00	403.40	44.80	44.80	825.60	825.60
1950	10.00	403.40	45.20	45.20	835.80	835.80
1951	20.00	403.40	68.50	68.50	835.80	835.80
1952	20.00	403.40	68.50	68.50	835.80	835.80
1953	25.00	403.40	85.00	85.00	923.50	923.50
1954	25.00	403.40	85.00	85.00	923.50	923.50
1955	30.00	403.40	98.50	98.50	923.50	923.50
1956	30.00	403.40	103.50	103.50	975.70	975.70
1957	30.00	403.40	108.50	108.50	1,019.90	1,019.90
1958	30.00	403.40	108.50	108.50	1,019.90	1,019.90
1959	33.00	403.40	116.00	116.00	1,019.90	1,019.90
1960	33.00	403.40	119.00	119.00	1,045.50	1,045.50
1961	33.00	403.40	120.00	120.00	1,053.80	1,053.80
1962	40.00	403.40	121.00	123.00	1,063.30	1,081.50
1963	40.00	403.40	122.00	125.00	1,071.80	1,097.50
1964	40.00	403.40	123.00	127.00	1,081.50	1,116.10
1965	44.00	403.40	131.70	135.90	1,081.50	1,116.10
1966	44.00	403.40	132.70	135.90	1,089.40	1,116.10
1967	44.00	403.40	135.90	140.00	1,116.10	1,149.00
1968	^c 55.00	403.40	^c 156.00	^c 161.60	1,132.80	1,173.60
1969	55.00	403.40	160.50	167.30	1,166.00	1,215.10
1970	64.00	403.40	189.80	196.40	1,198.60	1,241.30
1971	70.40	403.40	213.10	220.40	1,223.10	1,264.20
1972	70.40	403.40	216.10	224.70	1,241.30	1,289.80
1973	84.50	403.40	266.10	276.40	1,272.90	1,322.30
1974	84.50	403.40	274.60	284.90	1,312.90	1,362.90
1975	93.80	403.40	316.30	333.70	1,362.90	1,437.80
1976	101.40	403.40	364.00	378.80	1,451.20	1,510.40
1977	107.90	403.40	412.70	422.40	1,547.00	1,582.80
1978	114.30	403.40	459.80	459.80	1,627.40	1,627.40
1979	121.80	403.40	503.40	503.40	1,672.50	1,672.50
1980	133.90	403.40	572.00	572.00	1,729.40	1,729.40
1981	153.10	403.40	677.00	677.00	1,790.70	1,790.70
1982	^d 170.30	403.40	^d 679.30	^d 679.30	1,614.90	1,614.90
1983	^d 166.40	366.90	709.50	709.50	1,571.00	1,571.00
1984	^d 150.50	320.10	703.60	703.60	1,505.20	1,505.20
1985	^e	^e	717.20	717.20	1,482.70	1,482.70
1986	^e	^e	760.10	760.10	1,524.00	1,524.00
1987	^e	^e	789.20	789.20	1,562.40	1,562.40
1988	^e	^e	838.60	838.60	1,593.40	1,593.40
1989	^e	^e	899.60	899.60	1,643.30	1,643.30
1990	^e	^e	975.00	975.00	1,701.50	1,701.50
1991	^e	^e	1,022.90	1,022.90	1,693.60	1,693.60
1992	^e	^e	1,088.70	1,088.70	1,738.60	1,738.60
1993	^e	^e	1,128.80	1,128.80	1,750.10	1,750.10
1994	^e	^e	1,147.50	1,147.50	1,733.90	1,733.90
1995	^e	^e	1,199.10	1,199.10	1,762.80	1,762.80
1996	^e	^e	1,248.90	1,248.90	1,789.60	1,789.60
1997	^e	^e	1,326.60	1,326.60	1,847.50	1,847.50
1998	^e	^e	1,342.80	1,342.80	1,831.70	1,831.70
1999	^e	^e	1,373.10	1,373.10	1,848.90	1,848.90

(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, 1940–2011 (in dollars)—Continued

Year ^a	Minimum benefit payable		Maximum benefit payable			
	At retirement	Effective December 2010 ^b	At retirement		Effective December 2010 ^b	
			Men	Women	Men	Women
2000	e	e	1,435.30	1,435.30	1,885.70	1,885.70
2001	e	e	^f 1,538.20	^f 1,538.20	1,952.50	1,952.50
2002	e	e	1,660.50	1,660.50	2,054.50	2,054.50
2003 ^g	e	e	1,721.70	1,721.70	2,100.90	2,100.90
2004 ^h	e	e	1,784.80	1,784.80	2,133.10	2,133.10
2005 ⁱ	e	e	1,874.30	1,874.30	2,181.20	2,181.20
2006 ^j	e	e	1,961.90	1,961.90	2,193.40	2,193.40
2007 ^k	e	e	1,998.70	1,998.70	2,163.10	2,163.10
2008 ^l	e	e	2,030.60	2,030.60	2,148.30	2,148.30
2009 ^m	e	e	2,172.40	2,172.40	2,172.40	2,172.40
2010 ⁿ	e	e	2,191.70	2,191.70	2,191.70	2,191.70
2011 ^o	e	e	2,249.50	2,249.50	...	...

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

NOTE: ... = not applicable.

- a. Through 2002, assumes that the worker began to work at age 22, retired at the beginning of the year with unreduced benefits, had no earnings after retirement, and had no prior period of disability. Effective 2003, the same assumptions apply except that the benefit is reduced by 2 months because, for a worker retiring at age 65 in 2003, the age at which one can receive an unreduced benefit—the full retirement age (FRA)—has been raised from 65 to 65 and 2 months. In 2004, the FRA is 65 and 4 months, so the benefit is reduced by 4 months. In 2005, the FRA is 65 and 6 months, so the benefit is reduced by 6 months. In 2006, the FRA is 65 and 8 months, so the benefit is reduced by 8 months. In 2007, the FRA is 65 and 10 months, so the benefit is reduced by 10 months. Beginning in 2008, the FRA is 66, so the benefit is reduced by 12 months.
- b. Final benefit amount payable after Supplementary Medical Insurance (SMI) premium or any other deduction is rounded to next lower \$1.
- c. Effective February 1968.
- d. Derived from transitional guarantee computation based on primary insurance amount (PIA) table of 1978.
- e. In 1981, legislation eliminated the minimum PIA for workers who attain age 62 in 1982 or later. (The minimum is retained until 1991 for members of religious orders who are under a vow of poverty, provided that the order had elected Social Security coverage before December 29, 1981.)
- f. The cost-of-living adjustment (COLA) for December 1999 was originally determined to be 2.4 percent, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to Public Law 106-554, benefits were calculated and paid in August 2001 and later as if the COLA for December 1999 had been 2.5 percent. Affected beneficiaries received a one-time payment to cover the shortfall that occurred before August 2001.
- g. The full retirement benefit at age 65 and 2 months is \$1,741.10.
- h. The full retirement benefit at age 65 and 4 months is \$1,825.40.
- i. The full retirement benefit at age 65 and 6 months is \$1,939.00.
- j. The full retirement benefit at age 65 and 8 months is \$2,053.20.
- k. The full retirement benefit at age 65 and 10 months is \$2,116.30.
- l. The full retirement benefit at age 66 in 2008 is \$2,185.40.
- m. The full retirement benefit at age 66 in 2009 is \$2,323.80.
- n. The full retirement benefit at age 66 in 2010 is \$2,346.80.
- o. The full retirement benefit at age 66 in 2011 is \$2,366.10.

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

Table 2.A29—Earnings (retirement) test for years through 1999, by year enacted

Year enacted	Effective year	Beneficiaries exempt	Earnings subject to test	Amount permitted without reduction in benefits (exempt amount)		Reduction in monthly benefit ^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 for years through 1999, by year enacted—Continued

Year enacted	Effective year	Beneficiaries exempt	Earnings subject to test	Amount permitted without reduction in benefits (exempt amount)		Reduction in monthly benefit ^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 at full retirement age ^k	...	...	...

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>).

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 (FRA) 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 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. P.L. 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.

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

Table 2.A29.1—Earnings (retirement) test for 2000–2011, 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 ^b (dollars)	Monthly wages ^c (dollars)	
For beneficiaries who have reached full retirement age^d						
2000	2000	...	The earnings test no longer applies effective with the month of attainment of full retirement age.	...	...	...
For beneficiaries who will not reach full retirement age during year^d						
2000	2000	...	...	10,080	840	\$1 for each \$2 of earnings above \$10,080
	2001			10,680	890	\$1 for each \$2 of earnings above \$10,680
	2002			11,280	940	\$1 for each \$2 of earnings above \$11,280
	2003			11,520	960	\$1 for each \$2 of earnings above \$11,520
	2004			11,640	970	\$1 for each \$2 of earnings above \$11,640
	2005			12,000	1,000	\$1 for each \$2 of earnings above \$12,000
	2006			12,480	1,040	\$1 for each \$2 of earnings above \$12,480
	2007			12,960	1,080	\$1 for each \$2 of earnings above \$12,960
	2008			13,560	1,130	\$1 for each \$2 of earnings above \$13,560
	2009			14,160	1,180	\$1 for each \$2 of earnings above \$14,160
	2010			14,160	1,180	\$1 for each \$2 of earnings above \$14,160
	2011			14,160	1,180	\$1 for each \$2 of earnings above \$14,160
For beneficiaries who will reach full retirement age during year^d						
2000	2000	...	...	17,000	^e 1,416.67	\$1 for each \$3 of earnings above \$17,000
	2001			25,000	^f 2,083.33	\$1 for each \$3 of earnings above \$25,000
	2002			30,000	2,500.00	\$1 for each \$3 of earnings above \$30,000
	2003			30,720	2,560.00	\$1 for each \$3 of earnings above \$30,720
	2004			31,080	2,590.00	\$1 for each \$3 of earnings above \$31,080
	2005			31,800	2,650.00	\$1 for each \$3 of earnings above \$31,800
	2006			33,240	2,770.00	\$1 for each \$3 of earnings above \$33,240
	2007			34,440	2,870.00	\$1 for each \$3 of earnings above \$34,440
	2008			36,120	3,010.00	\$1 for each \$3 of earnings above \$36,120
	2009			37,680	3,140.00	\$1 for each \$3 of earnings above \$37,680
	2010			37,680	3,140.00	\$1 for each \$3 of earnings above \$37,680
	2011			37,680	3,140.00	\$1 for each \$3 of earnings above \$37,680

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

NOTES: Public Law (P.L.) 106-182, enacted April 7, 2000, eliminated the earnings test beginning with the month a beneficiary reaches full retirement age (FRA). The annual earnings test that applies in the year of attainment of FRA is based on the annual limits established under P.L. 104-121 (including the \$1 for \$3 withholding rate). In determining annual earnings for purposes of the annual earnings test under this legislation, only earnings before the month of attainment of FRA will be considered. P.L. 106-182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year, which continues to be pegged to increases in the average wage.

... = not applicable.

- Earnings of a retired-worker beneficiary affect total monthly family benefit. Earnings of a dependent or survivor beneficiary affect only his or her benefit. However, earnings of a retired-worker beneficiary do not affect the benefit to a divorced spouse who has been divorced at least 2 years. The 2-year requirement is waived if the worker was entitled to benefits before the divorce.
- Automatic adjustment provisions and legislative history of the earnings test are in Table 2.A18.
- Monthly test for self-employment income is defined in terms of substantial services. Each individual may use a monthly test for 1 grace year, usually the year of retirement.
- Full retirement age is 65 for beneficiaries who attain age 62 (age 60 for widow(er)s) before 2000, gradually increasing to age 67 for beneficiaries who attain age 62 in 2022 or later. See Table 2.A17.1 for the FRA by year of birth.
- Actual amount is \$1,416.66 2/3.
- Actual amount is \$2,083.33 1/3.

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

Table 2.A30—Monthly earnings guidelines for substantial gainful activity, 1961–2011 (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	...	810	1,350
January 2005	...	830	1,380
January 2006	...	860	1,450
January 2007	...	900	1,500
January 2008	...	940	1,570
January 2009	...	980	1,640
January 2010	...	1,000	1,640
January 2011	...	1,000	1,640

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, "Cost-of-Living Increase and Other Determinations for 2011; Correction," *Federal Register*, vol. 75, no. 229 (November 30, 2010).

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 from those of nonblind beneficiaries.
- c. Pre-1978 guidelines are the same as those for 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).

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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, 2010; 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 the Social Security Program Rules page (<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.

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

Table 2.A32—Taxation of Social Security benefits: Examples (in dollars)

Modified adjusted gross income ^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—lesser 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—lesser 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, 2010; 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 the Social Security Program Rules page (<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 more than \$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.

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2.B Other Programs: Supplemental Security Income

Table 2.B1—Federal benefit rates, by living arrangement, 1974–2011

Act	Effective date	Amount ^a (dollars)	
		Individual	Couple
<i>Own household ^b</i>			
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
January 1, 2005	579.00	869.00	
January 1, 2006	603.00	904.00	
January 1, 2007	623.00	934.00	
January 1, 2008	637.00	956.00	
January 1, 2009	674.00	1,011.00	
January 1, 2010	674.00	1,011.00	
January 1, 2011	674.00	1,011.00	

(Continued)

2.B Other Programs: Supplemental Security Income

Table 2.B1—Federal benefit rates, by living arrangement, 1974–2011—Continued

Act	Effective date	Amount ^a (dollars)	
		Individual	Couple
<i>Receiving institutional care covered by Medicaid ^g</i>			
1972	January 1, 1974	25.00	50.00
1987	July 1, 1988	30.00	60.00

SOURCES: Social Security Act of 1935 (the Act), as amended through December 31, 2010; 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 the Social Security Program Rules page (<http://www.socialsecurity.gov/regulations/index.htm>). Social Security Administration, Office of the Chief Actuary, "SSI Federal Payment Amounts," <http://www.socialsecurity.gov/OACT/COLA/SSlamts.html>.

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

- a. For those without countable income. These payments are reduced by the amount of countable income of the individual or couple.
- b. Includes persons in private institutions whose care is not provided by Medicaid.
- c. Superseded by the provision of 1973.
- d. Mechanism established for providing cost-of-living adjustments.
- e. General benefit increase.
- f. Benefits originally paid in 2000 and through July 2001 were based on federal benefit rates of \$512 and \$530, respectively. Pursuant to Public Law 106-554, monthly payments beginning in August 2001 were effectively based on the higher \$531 amount. Lump-sum compensation payments were made on the basis of an adjusted benefit rate for months prior to August 2001.
- g. Must be receiving more than 50 percent of the cost of the care from Medicaid (Title XIX of the Social Security Act).

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2.C Other Programs: Medicare

Table 2.C1—Medicare cost sharing and premium amounts, 1966–2012 ^a

Effective date ^b	Hospital Insurance (Medicare Part A)				Supplementary Medical Insurance (Medicare Parts B and D)										
	All expenses in "benefit period" covered except—				Monthly premium ^d (dollars)	Part B					Part D ^c				
						Annual deductible ^e (dollars)	Coinsurance ^e (percent)	Monthly premium (dollars)		Annual deductible ^f (dollars)	Initial coverage limit ^f (dollars)	Out-of-pocket threshold ^f (dollars)	Base beneficiary monthly premium ^g (dollars)		
	For enrollee ^h (aged and disabled)	Government amounts for—													
Aged		Disabled													
	Inpatient hospital deductible (IHD) covers first 60 days (dollars)	Inpatient hospital daily coinsurance Days 61 through 90 (1/4 x IHD) (dollars)	Lifetime reserve days after 90 (1/2 x IHD) (dollars)	Skilled nursing facility daily coinsurance for days 21 through 100 (1/8 x IHD) (dollars)											
1966	40	10	...	...	...	50	20	3.00	3.00	...	...	...	...	...
1967	40	10	...	5.00	...	50	20	3.00	3.00	...	...	...	...	...
1968	40	10	20	5.00	...	ⁱ 50	ⁱ 20	^j 4.00	^j 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	^k 20	5.80	5.80	...	...	...	...	...
1973	72	18	36	9.00	33	60	20	^l 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	^{m,n} 60	ⁿ 20	11.00	34.20	62.20	...	...	...	...
1982	260	65	130	32.50	113	^o 75	^o 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	^p 560	^p	^p	^q 25.50	156	75	20	^r 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	245	100	20	41.10	82.50	111.10	...	...	...	...
1995	716	179	358	89.50	261	100	20	46.10	100.10	165.50	...	...	...	...
1996	736	184	368	92.00	289	100	20	42.50	127.30	167.70	...	...	...	...
1997	760	190	380	95.00	311	100	20	43.80	131.40	177.00	...	...	...	...
1998	764	191	382	95.50	309	100	20	43.80	132.00	150.40	...	...	...	...
1999	768	192	384	96.00	309	100	20	45.50	139.10	160.50	...	...	...	...
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	^s	^s	^s	^s	

(Continued)

Table 2.C1—Medicare cost sharing and premium amounts, 1966–2012 ^a—Continued

Effective date ^b	Hospital Insurance (Medicare Part A)				Supplementary Medical Insurance (Medicare Parts B and D)									
	All expenses in "benefit period" covered except—				Part B					Part D ^c				
					Monthly premium ^d (dollars)	Annual deductible ^e (dollars)	Coinsurance ^e (percent)	Monthly premium (dollars)		Annual deductible ^f (dollars)	Initial coverage limit ^f (dollars)	Out-of-pocket threshold ^f (dollars)	Base beneficiary monthly premium ^g (dollars)	
	For enrollee ^h (aged and disabled)	Government amounts for—												
	Inpatient hospital deductible (IHD) covers first 60 days (dollars)	Inpatient hospital daily coinsurance Days 61 through 90 (1/4 x IHD) (dollars)	Lifetime reserve days after 90 (1/2 x IHD) (dollars)	Skilled nursing facility daily coinsurance for days 21 through 100 (1/8 x IHD) (dollars)					Aged	Disabled				
2005	912	228	456	114.00	375	110	20	78.20	234.60	305.40	s	s	s	s
2006	952	238	476	119.00	393	124	20	88.50	265.30	318.90	250	2,250	^t 3,600	32.20
2007	992	248	496	124.00	410	131	20	^u 93.50	^v 280.50	^v 301.10	265	2,400	^t 3,850	27.35
2008	1,024	256	512	128.00	423	135	20	^u 96.40	^v 289.00	^v 323.00	275	2,510	^t 4,050	27.93
2009	1,068	267	534	133.50	443	135	20	^u 96.40	^v 289.00	^v 352.00	295	2,700	^t 4,350	30.36
2010	1,100	275	550	137.50	461	155	20	^{u,w} 110.50	^v 331.50	^v 430.30	310	2,830	^t 4,550	31.94
2011	1,132	283	566	141.50	450	162	20	^{u,x} 115.40	^v 346.00	^v 417.20	310	2,840	^t 4,550	^y 32.34
2012	1,156	289	578	144.50	451	140	20	^u 99.90	^v 299.70	^v 285.10	320	2,930	^t 4,700	^y 31.08

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: The structure of Medicare has become increasingly complex over the years. This table provides a summary of Medicare cost sharing and premium provisions. It should be used as an overview and general guide. It is not intended to explain fully all of the provisions or exclusions of the applicable Medicare laws, regulations, and rulings. Original sources of authority should be consulted for specific details.

Values for certain 2012 premiums, copayments, and out-of-pocket thresholds not shown in the table are provided in footnotes as applicable. Corresponding values for prior years are available in previous editions of this table.

... = not applicable.

- a. As of November 1, 2011.
- b. Deductible and coinsurance amounts begin in January unless otherwise noted. Monthly premium amounts took effect in July through 1983 and in January beginning in 1984.
- c. Enrollment in Part D is voluntary. Substantial premium and cost-sharing subsidies and waivers are available for Part D beneficiaries who meet certain low-income and limited-resources criteria. Subsidy levels vary.
- d. Standard premium rate for voluntary enrollment by certain aged and disabled individuals not otherwise entitled to Hospital Insurance (HI). (Most individuals aged 65 and older and many disabled individuals under age 65 are insured for HI benefits without payment of any premium.) Beginning in 1994, a reduced premium is available to premium-paying HI enrollees with at least 30 quarters of Medicare-covered employment (either their own or through a current or former spouse if the marriage meets certain duration criteria). In most cases, a surcharge applies for beneficiaries who enroll after their initial enrollment period.
- e. Most services under Part B are subject to the annual deductible and coinsurance percentages shown. Some noteworthy exceptions are footnoted; others include (1) clinical lab tests, home health agency services, and certain prescribed preventive care services, which are not subject to the deductible or coinsurance and for which the beneficiary pays nothing; (2) outpatient psychiatric services, for which the coinsurance is 50 percent but phases down to 20 percent over the 5-year period 2010–2014; and (3) most services reimbursed under the outpatient hospital prospective payment system, for which the coinsurance percentage varies by service but currently falls in the range of 20 percent to 50 percent.
- f. Under the standard Part D benefit design, the beneficiary pays an initial deductible and 25 percent of the remaining costs until reaching the initial coverage limit. Between the initial coverage limit and the out-of-pocket threshold is a "coverage gap." Beneficiaries in the coverage gap paid the full cost of their prescription drugs from 2006 to 2009. For 2010, beneficiaries in the coverage gap (excluding those low-income enrollees eligible for cost-sharing subsidies) received a \$250 rebate; for 2011, these beneficiaries received a 50-percent discount on covered brand-name prescription drugs and a 7-percent discount on covered generic drugs; and in 2012, these beneficiaries will receive a 50-percent discount on covered brand-name prescription drugs and a 14-percent discount on covered generic drugs. In determining out-of-pocket costs, costs reimbursed through insurance are not counted toward the out-of-pocket threshold, except for cost-sharing assistance provided to low-income enrollees by Part D and State Pharmacy Assistance programs and, starting in 2011, the 50-percent discount on brand-name drugs purchased by enrollees in the Part D coverage gap. For costs incurred after the out-of-pocket threshold is reached, "catastrophic coverage" requires enrollees to pay the greater of a 5-percent coinsurance or a small copayment (for 2012, \$2.60 for generic or preferred multi-source drugs and \$6.50 for other drugs). Many Part D plans differ from this standard coverage design; in fact, the majority of beneficiaries are enrolled in plans with low or no deductibles, flat payments for covered drugs, and, in some cases, additional partial coverage in the coverage gap.
- g. The Part D premiums paid by individual beneficiaries equal the base beneficiary premium adjusted by a number of factors. Premiums vary significantly from one plan to another and seldom equal the base beneficiary premium. The estimated average monthly premium for 2012, as calculated and announced prior to the start of the year (based on the bids submitted by Part D plans, the specific plan-by-plan premiums, and the estimated number of beneficiaries in each plan) is \$30. A surcharge for enrollment after the initial enrollment period may apply.
- h. Represents standard premium for voluntary enrollment in Part B. This is the amount paid by most beneficiaries in most years (2010 and 2011 are notable exceptions). Three factors can alter the premium paid by a beneficiary: enrollment after the initial enrollment period, for which a surcharge may apply; adjustments for beneficiaries whose income is above certain thresholds; and a "hold-harmless" provision that prohibits Part B premium increases that exceed the dollar amount of a beneficiary's Social Security cost-of-living adjustment. See also footnotes u, w, and x.
- i. Professional inpatient services of pathologists and radiologists not subject to deductible or coinsurance, beginning in April 1968.
- j. Beginning in April 1968.
- k. Home health services not subject to coinsurance, beginning in January 1973.
- l. Standard monthly premiums for July and August 1973 were reduced to \$5.80 and \$6.10, respectively, by the Cost of Living Council.

(Continued)

2.C Other Programs: Medicare

Table 2.C1—Medicare cost sharing and premium amounts, 1966–2012^a—Continued

- m. Home health services not subject to deductible, beginning July 1, 1981.
- n. Professional inpatient services of pathologists and radiologists not subject to deductible or coinsurance, but only when physician accepts assignment.
- o. Effective October 1, 1982, professional inpatient services of pathologists and radiologists are subject to deductible and coinsurance.
- p. The 1989 deductible was applied on an annual basis rather than a benefit-period basis. Once the beneficiary paid the deductible, 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 to 190 days).
- q. In 1989 the coinsurance amount was equal to 20 percent of the estimated national average daily cost of covered skilled nursing facility care, the beneficiary paid the coinsurance amount for the first 8 days of care during the year, and benefits were available for up to 150 days of care during the year.
- r. Includes the standard monthly Part B premium and a supplemental monthly flat premium under the Medicare Catastrophic Coverage Act of 1988. Persons enrolled in Part B only and residents of Puerto Rico and other territories and commonwealths paid lower supplemental flat premiums.
- s. A temporary Medicare-endorsed prescription drug discount card program was offered. See the Medicare section of "Program Descriptions and Legislative History" (page 52 in this Supplement).
- t. The 2012 out-of-pocket threshold of \$4,700 is equivalent to total covered drug costs of \$6,657.50 during the initial coverage period and the coverage gap. This amount includes the covered drug costs paid by the beneficiary *and* the 50-percent discount on covered brand-name drugs during the coverage gap. The dollar value of this discount counts toward out-of-pocket spending, even though the beneficiary does not pay it. (The dollar value of the 14-percent discount on covered generic drugs does *not* count toward out-of-pocket spending.) See previous editions of this table for prior years' equivalent total covered drug costs.
- u. See footnote h. The 2012 Part B income-related monthly adjustment amounts and total monthly premium amounts to be paid by beneficiaries, according to income level and filing status, are shown in the Medicare section of "Program Descriptions and Legislative History" (page 39 in this Supplement). See previous editions of the Supplement for prior years' adjustment and premium amounts.
- v. For beneficiaries paying an income-related adjustment, the government amounts are to be reduced accordingly. See also footnotes h and u.
- w. Most Part B enrollees are protected by a "hold-harmless" provision prohibiting Part B premium increases that exceed the dollar amount of an individual's Social Security cost-of-living adjustment (COLA). Because the 2010 COLA equaled 0 percent, about 73 percent of Part B enrollees continued to pay the 2009 premium amount in 2010.
- x. See footnote w. Because the 2011 COLA again equaled 0 percent, most Part B enrollees continued to pay the same premium amount they paid in 2010.
- y. See footnote g. The 2012 Part D income-related monthly adjustment amounts to be paid by beneficiaries, according to income level and filing status, are shown in the Medicare section of "Program Descriptions and Legislative History" (page 40 in this Supplement). See previous editions of the Supplement for prior years' adjustment amounts.

CONTACT: John Shatto (410) 786-0706 or statistics@ssa.gov.

Table 2.C2—Federal medical assistance percentage and enhanced federal medical assistance percentage, by state or other area, 2010–2012

State or area	Federal medical assistance percentage ^a			Enhanced federal medical assistance percentage ^b		
	2010 ^c	2011 ^d	2012 ^e	2010 ^c	2011 ^d	2012 ^e
Alabama	68.01	68.54	68.62	77.61	77.98	78.03
Alaska	51.43	50.00	50.00	66.00	65.00	65.00
Arizona	65.75	65.85	67.30	76.03	76.10	77.11
Arkansas	72.78	71.37	70.71	80.95	79.96	79.50
California	50.00	50.00	50.00	65.00	65.00	65.00
Colorado	50.00	50.00	50.00	65.00	65.00	65.00
Connecticut	50.00	50.00	50.00	65.00	65.00	65.00
Delaware	50.21	53.15	54.17	65.15	67.21	67.92
District of Columbia ^f	70.00	70.00	70.00	79.00	79.00	79.00
Florida	54.98	55.45	56.04	68.49	68.82	69.23
Georgia	65.10	65.33	66.16	75.57	75.73	76.31
Hawaii	54.24	51.79	50.48	67.97	66.25	65.34
Idaho	69.40	68.85	70.23	78.58	78.20	79.16
Illinois	50.17	50.20	50.00	65.12	65.14	65.00
Indiana	65.93	66.52	66.96	76.15	76.56	76.87
Iowa	63.51	62.63	60.71	74.46	73.84	72.50
Kansas	60.38	59.05	56.91	72.27	71.34	69.84
Kentucky	70.96	71.49	71.18	79.67	80.04	79.83
Louisiana	67.61	63.61	61.09	77.33	74.53	72.76
Maine	64.99	63.80	63.27	75.49	74.66	74.29
Maryland	50.00	50.00	50.00	65.00	65.00	65.00
Massachusetts	50.00	50.00	50.00	65.00	65.00	65.00
Michigan	63.19	65.79	66.14	74.23	76.05	76.30
Minnesota	50.00	50.00	50.00	65.00	65.00	65.00
Mississippi	75.67	74.73	74.18	82.97	82.31	81.93
Missouri	64.51	63.29	63.45	75.16	74.30	74.42
Montana	67.42	66.81	66.11	77.19	76.77	76.28
Nebraska	60.56	58.44	56.64	72.39	70.91	69.65
Nevada	50.16	51.61	56.20	65.11	66.13	69.34
New Hampshire	50.00	50.00	50.00	65.00	65.00	65.00
New Jersey	50.00	50.00	50.00	65.00	65.00	65.00
New Mexico	71.35	69.78	69.36	79.95	78.85	78.55
New York	50.00	50.00	50.00	65.00	65.00	65.00
North Carolina	65.13	64.71	65.28	75.59	75.30	75.70
North Dakota	63.01	60.35	55.40	74.11	72.25	68.78
Ohio	63.42	63.69	64.15	74.39	74.58	74.91
Oklahoma	64.43	64.94	63.88	75.10	75.46	74.72
Oregon	62.74	62.85	62.91	73.92	74.00	74.04
Pennsylvania	54.81	55.64	55.07	68.37	68.95	68.55
Rhode Island	52.63	52.97	52.12	66.84	67.08	66.48
South Carolina	70.32	70.04	70.24	79.22	79.03	79.17
South Dakota	62.72	61.25	59.13	73.90	72.88	71.39
Tennessee	65.57	65.85	66.36	75.90	76.10	76.45
Texas	58.73	60.56	58.22	71.11	72.39	70.75
Utah	71.68	71.13	70.99	80.18	79.79	79.69
Vermont	58.73	58.71	57.58	71.11	71.10	70.31
Virginia	50.00	50.00	50.00	65.00	65.00	65.00
Washington	50.12	50.00	50.00	65.08	65.00	65.00
West Virginia	74.04	73.24	72.62	81.83	81.27	80.83
Wisconsin	60.21	60.16	60.53	72.15	72.11	72.37
Wyoming	50.00	50.00	50.00	65.00	65.00	65.00

(Continued)

2.C Other Programs: Medicaid

Table 2.C2—Federal medical assistance percentage and enhanced federal medical assistance percentage, by state or other area, 2010–2012—Continued

State or area	Federal medical assistance percentage ^a			Enhanced federal medical assistance percentage ^b		
	2010 ^c	2011 ^d	2012 ^e	2010 ^c	2011 ^d	2012 ^e
Outlying areas						
American Samoa ^g	50.00	50.00	50.00	65.00	65.00	65.00
Guam ^g	50.00	50.00	50.00	65.00	65.00	65.00
Northern Mariana Islands ^g	50.00	50.00	50.00	65.00	65.00	65.00
Puerto Rico ^g	50.00	50.00	50.00	65.00	65.00	65.00
U.S. Virgin Islands ^g	50.00	50.00	50.00	65.00	65.00	65.00

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

- a. Section 1905(b) of the Social Security Act (the Act) specifies the method to be used to compute the federal medical assistance percentage. From this section the following formula is derived: $N = 3\text{-year average national per capita personal income}$; $S = 3\text{-year average state per capita personal income}$. Federal medical assistance percentage: State share = $(S^2/N^2) \times 45$ or $(45/N^2) \times S^2$; Federal share = $100 - \text{state share}$ with 50–83 percent limits.
- b. This is the Title XXI enhanced federal medical assistance percentage rate specified in section 2105(b) of the Act. The enhanced federal medical assistance percentage cannot exceed 85 percent.
- c. Effective October 1, 2009, through September 30, 2010.
- d. Effective October 1, 2010, through September 30, 2011.
- e. Effective October 1, 2011, through September 30, 2012.
- f. The values for the District of Columbia (DC) in the table were set for the state plan under titles XIX and XXI and for capitation payments and Disproportionate Share Hospital (DSH) allotments under those titles. For other purposes, including programs remaining in Title IV of the Act, the percentage for DC is 50.00.
- g. For purposes of section 1118 of the Social Security Act, the federal medical assistance percentage used under titles I, X, XIV, and XVI, and part A of title IV will be 75 percent.

CONTACT: Thomas Musco (202) 690-6870 or statistics@ssa.gov.

Table 2.F1—Number of SSA offices, 2010

Office	Number
Headquarters (Baltimore, Maryland)	1
Regional offices ^a	10
Area Offices	54
Field offices ^b	1,297
Level 1	628
Level 2	630
Resident stations	31
Social Security Card Centers ^c	8
Teleservice centers	33
Program service centers ^d	6
Data operations center ^e	1
Office of Disability Adjudication and Review	
Headquarters (Falls Church, Virginia)	1
Regional offices	10
Hearing offices	156
Satellite offices	7
National hearing centers ^f	5
National case assistance centers ^f	2

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

- a. Regional offices are located in Boston, Massachusetts; New York, New York; Philadelphia, Pennsylvania; Atlanta, Georgia; Chicago, Illinois; Dallas, Texas; Kansas City, Missouri; Denver, Colorado; San Francisco, California; and Seattle, Washington.
- b. Field offices are designated as level 1, level 2, or resident stations depending on the characteristics of the facility, service area, and other conditions.
- c. Social Security Card Centers are located in Queens, New York; Brooklyn, New York; Orlando, Florida; Minneapolis, Minnesota; North Phoenix, Arizona; Downtown Phoenix, Arizona; Las Vegas, Nevada; and Sacramento, California.
- d. Program service centers are located in Jamaica, New York; Philadelphia, Pennsylvania; Birmingham, Alabama; Chicago, Illinois; Kansas City, Missouri; and Richmond, California.
- e. The data operations center is located in Wilkes-Barre, Pennsylvania.
- f. The National centers are part of the Social Security Administration's strategy to address the historic hearings backlogs and reduce case processing time by increasing adjudicatory capacity and efficiency with a focus on the electronic hearing process.

CONTACT: Kristy Brumfield for SSA data (410) 966-9785 and Carole Hoffman for Office of Disability Adjudication and Review data (703) 605-8754 or statistics@ssa.gov.

2.F SSA Administrative Data: Offices and Staff

Table 2.F2—Number of SSA employees and percentage with selected characteristics by grade, September 30, 2010

Characteristic	All grade levels	GS 1–4	GS 5–8	GS 9–12	GS 13–15	SES
	<i>Number</i>					
Total ^a	68,883	438	21,253	34,642	10,633	155
	<i>Percentage of total</i>					
Women	68.2	58.4	73.7	71.0	56.2	43.2
Minorities	49.2	56.2	57.9	50.0	34.5	25.2
Black	28.5	38.8	34.6	27.6	21.8	18.1
Hispanic	14.0	11.9	16.8	15.0	7.2	5.2
Asian/Pacific Islander	5.4	4.3	5.3	6.0	4.6	0.6
American Indian/Alaska Native	1.3	1.1	1.4	1.4	1.1	1.3
Employees with targeted disabilities	2.0	11.6	3.3	1.4	0.9	1.3

SOURCE: Social Security Administration's Human Resources Management Information System.

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

CONTACT: David V. Smith (410) 966-9424 or statistics@ssa.gov.

Table 2.F3—Number of work years, fiscal years 1995–2010

Year	Full-time permanent staff ^a	Total work years ^b
1995	62,504	67,063
1996	62,133	66,726
1997	61,224	69,378
1998	59,943	67,210
1999	59,752	66,459
2000	60,434	65,521
2001	61,490	65,562
2002	61,914	65,742
2003	63,569	65,343
2004	63,186	^c 66,154
2005	63,696	^d 68,026
2006	61,692	66,878
2007	60,206	63,939
2008	61,920	64,358
2009	65,203	67,170
2010	67,548	70,758

SOURCE: Social Security Administration's Payroll Reports.

a. On duty at end of fiscal year; includes seasonal employees.

b. Includes full-time, part-time, and temporary employees; employees in special programs; and overtime hours worked.

c. Includes 178 work years for activities related to Medicare Modernization Act.

d. Includes 1,962 work years for Medicare Modernization Act.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 2.F4—Number of Old-Age and Survivors Insurance claims, fiscal year 2010 (in thousands)

Workload	Total	Worker	Family members and survivors
Received	4,658.1	3,066.8	1,591.3
Processed ^a	4,701.0	3,083.7	1,617.3

SOURCE: Social Security Administration, Office of Systems, Integrated Work Measurement System.

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 2.F5—Number of Disability Insurance claims, fiscal year 2010 (in thousands)

Workload	Total	Worker	Family members and survivors
Received	3,421.7	3,095.2	326.5
Processed ^a	3,416.5	3,083.6	332.9

SOURCE: Social Security Administration, Office of Systems, Integrated Work Measurement System.

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 2.F6—Number of Supplemental Security Income claims, fiscal year 2010 (in thousands)

Workload	Total	Aged	Blind or disabled
Received	3,124.5	294.0	2,830.5
Processed ^a	3,079.1	292.8	2,786.3

SOURCE: Social Security Administration, Office of Systems, Integrated Work Measurement System.

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

2.F SSA Administrative Data: Service Delivery

Table 2.F7—Accuracy rates and use of 800 telephone number, fiscal years 2006–2010

Item	2006	2007	2008	2009	2010
<i>Accuracy rates (percent)</i>					
OASI payments					
Payment review/stewardship results					
Excess payments	99.8	99.9	99.8	99.8	99.7
Underpayments	99.9	99.9	99.9	99.9	99.9
SSI payments					
Payment review/stewardship results					
Excess payments	92.1	90.9	89.7	91.6	93.3
Underpayments	97.8	98.5	98.3	98.4	97.6
Disability Insurance benefits ^a					
Initial claims	93.4	93.8	94.4	94.9	96.8
Allowances	96.1	96.5	97.7	98.0	98.6
Denials	92.0	92.3	92.5	93.0	95.9
Reconsideration of denials	91.2	91.9	92.1	94.3	95.9
Reversals	96.2	97.5	97.8	97.9	98.3
Affirmations	90.5	91.0	91.2	93.7	95.6
<i>National 800 number network (1-800-772-1213) ^b</i>					
Network calls received (millions)	91.8	79.9	82.6	^c 85.8	82.2
Average wait for live agent service (minutes)	4.6	4.2	5.4	4.1	3.4

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

- a. Represents cases free of decisional and documentation errors.
- b. Data for 2006–2007 may not match those in previous editions of this table because of the introduction in 2008 of new measurements of call volume and processing time.
- c. Revised data.

CONTACT: Martha Takla (410) 966-3888, Roy Harper (410) 966-5997, or statistics@ssa.gov.

2.F SSA Administrative Data: Hearings and Appeals

Table 2.F8—Workload of SSA’s Administrative Law Judges (ALJs), fiscal years 2008–2010

Item	2008	2009	2010
Number of ALJs	960	1,057	1,154
Average monthly hearing dispositions per ALJ ^a	48	49	49
Average hearings pending per ALJ	643	575	528

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

NOTE: Number of ALJs and average monthly hearing dispositions per ALJ based on fiscal year average ALJ availability; average hearings pending per ALJ based on ALJs on duty. Data exclude Regional Chief ALJs.

a. Calculation excludes Attorney Adjudicator decisions, which numbered 24,575 in fiscal year 2008, 36,366 in fiscal year 2009, and 54,186 in fiscal year 2010.

CONTACT: Chuck Gramens (703) 605-8413 or statistics@ssa.gov.

Table 2.F9—Number of hearing level receipts, dispositions, and end-of-year pending cases, fiscal years 2009–2010

Program	Hearing level receipts		Hearing level dispositions		End-of-year pending cases	
	2009	2010	2009	2010	2009	2010
Total	622,851	720,161	660,842	737,616	722,822	705,367
OASI	2,047	2,170	2,051	2,170	1,596	1,596
Disability						
DI	193,020	220,974	228,225	232,801	210,470	198,643
SSI	173,210	204,447	168,887	200,681	209,318	213,084
DI and SSI	254,574	292,570	261,679	301,964	301,438	292,044

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

CONTACT: Chuck Gramens (703) 605-8413 or statistics@ssa.gov.

Table 2.F11—Number of SSA Appeals Council cases, fiscal years 2008–2010

Cases	2008	2009	2010
Beginning-of-year pending	53,163	62,210	80,040
Receipts	92,454	106,965	128,703
Dispositions	83,407	89,066	102,062
End-of-year pending	62,210	80,040	^a 106,664

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

a. The Appeals Review Processing System recategorized 17 cases after they had been counted as receipts or dispositions.

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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 1938–2011

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 1938–2011—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
2004 ^e	5.15	5.15	5.15	5.15	16.14	40.8
2005 ^e	5.15	5.15	5.15	5.15	16.56	40.7
2006 ^e	5.15	5.15	5.15	5.15	16.81	41.1
2007 ^{e,f}	5.85	5.85	5.85	5.85	17.26	41.2
2008 ^{e,g}	6.55	6.55	6.55	6.55	17.75	40.8
2009 ^{e,h}	7.25	7.25	7.25	7.25	ⁱ 18.24	39.8
2010 ^e	7.25	7.25	7.25	7.25	18.61	41.1
2011 ^e	7.25	7.25	7.25	7.25	--	--

SOURCE: Department of Labor, Bureau of Labor Statistics.

NOTE: . . . = not applicable; -- = not available.

- a. For year in which minimum wage rate changes were effective.
- b. The 1938 act was applicable generally to employees engaged in interstate commerce or in the production of goods for interstate commerce.
- c. The 1961 amendments extended coverage primarily to employees in large retail and service trades as well as local transit, construction, and gasoline service station employees.
- d. The 1966 amendments extended coverage to state and local government employees of hospitals, nursing homes, and schools, and to employees of laundries, dry cleaners, large hotels and motels, restaurants, and farms. Subsequent amendments extended coverage to the remaining federal, state, and local employees not protected in 1966, to certain workers in retail and service trades previously exempted, and to certain domestic workers in private household employment.
- e. A training wage may be paid for a period of 90 days to an employee who has not attained age 20. The training wage was \$3.35 per hour effective April 1, 1990, and \$3.61 per hour effective April 1, 1991, through March 31, 1993. Effective October 1, 1996, the training wage is \$4.25 per hour.
- f. Effective July 24, 2007.
- g. Effective July 24, 2008.
- h. Effective July 24, 2009.
- i. Revised data.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 3.C3—Contributions to the Social Security and Medicare trust funds, by program and source, 2001–2010 (in millions of dollars)

Program and source	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Social Security trust funds										
Old-Age and Survivors Insurance ^a	453,354	468,107	468,574	486,726	520,706	550,414	578,069	590,121	590,321	569,006
Employer	210,659	215,897	217,675	223,311	241,018	253,705	265,753	272,060	269,586	259,387
Employee	207,999	215,039	216,222	222,118	239,163	251,813	263,856	269,956	267,440	257,893
Self-employed	22,793	24,262	22,179	26,703	26,682	29,269	31,269	32,540	33,366	29,635
Taxation of benefits	11,903	12,909	12,497	14,593	13,843	15,628	17,192	15,566	19,930	22,090
Disability Insurance ^a	75,743	78,202	78,386	81,287	87,150	92,038	96,636	98,879	98,820	94,726
Employer	35,759	36,655	36,962	37,922	40,929	43,081	45,127	46,199	45,783	44,047
Employee	35,312	36,503	36,716	37,720	40,614	42,760	44,804	45,841	45,418	43,794
Self-employed	3,861	4,114	3,764	4,534	4,534	4,967	5,312	5,526	5,664	5,034
Taxation of benefits	811	930	944	1,111	1,073	1,230	1,393	1,313	1,955	1,852
Medicare trust funds										
Hospital Insurance ^a	160,896	162,650	159,164	166,977	182,565	194,238	205,289	213,364	206,173	199,102
Employer	71,181	71,334	69,885	72,760	80,159	84,417	89,093	91,981	88,242	84,397
Employee	71,181	71,334	69,885	72,760	80,159	84,417	89,093	91,981	88,242	84,397
Self-employed	9,631	10,040	9,472	10,964	11,065	12,439	13,669	14,732	14,405	13,238
Voluntarily enrolled ^b	1,370	1,626	1,604	1,915	2,416	2,645	2,841	2,938	2,908	3,310
Taxation of benefits	7,533	8,316	8,318	8,577	8,765	10,319	10,593	11,733	12,376	13,760
Supplementary Medical Insurance ^{a,c}	22,764	25,066	27,402	31,435	37,535	42,853	46,773	50,232	56,040	47,282
Aged	19,905	21,610	23,546	26,737	31,722	36,346	39,676	42,335	47,433	39,273
Disabled	2,859	3,456	3,856	4,699	5,813	6,507	7,096	7,897	8,606	8,009

SOURCE: Department of the Treasury.

- a. Totals do not necessarily equal the sum of rounded components. Employment taxes depend on tax rates and, for the Old-Age and Survivors Insurance and Disability Insurance Trust Funds, wage bases (taxable maximums). (Beginning in 1994, no wage base applies to Medicare's Hospital Insurance program.) Employer and employee contributions differ by estimated amounts of employee tax overpayments and by employee tax on tips.
- b. Beginning in July 1973, aged ineligible may voluntarily enroll for HI.
- c. Includes premiums paid on behalf of eligibles by state governments under "buy-in" arrangements.

CONTACT: Michael Stephens (410) 965-3028 or statistics@ssa.gov.

3.C Interprogram Data

Table 3.C4—Average monthly amount of Social Security and Supplemental Security Income, December 1950–2010 (in current and 2010 dollars)

Year	Average monthly Social Security benefit in current-payment status				Average monthly Supplemental Security Income amount for—		Consumer Price Index ^a
	Retired workers		Widowed mother or father and 2 children		Aged recipients ^b		
	Current dollars	2010 dollars	Current dollars	2010 dollars	Current dollars	2010 dollars	
1950	43.86	384.56	93.90	823.32	43.05	377.46	25.0
1951	42.14	348.57	93.80	775.89	44.55	368.50	26.5
1952	49.25	404.33	106.00	870.23	48.80	400.64	26.7
1953	51.10	416.40	111.90	911.84	48.90	398.47	26.9
1954	59.14	485.52	130.50	1,071.37	48.70	399.81	26.7
1955	61.90	506.29	135.40	1,107.45	50.05	409.36	26.8
1956	63.09	501.06	141.00	1,119.83	53.25	422.91	27.6
1957	64.58	498.45	146.30	1,129.19	55.50	428.37	28.4
1958	66.35	503.25	151.70	1,150.61	56.95	431.95	28.9
1959	72.78	542.63	170.70	1,272.70	56.70	422.74	29.4
1960	74.04	544.62	188.00	1,382.87	58.90	433.25	29.8
1961	75.65	552.75	189.30	1,383.15	57.60	420.86	30.0
1962	76.19	549.37	190.70	1,375.05	61.55	443.81	30.4
1963	76.88	545.38	192.50	1,365.57	62.80	445.49	30.9
1964	77.57	544.98	193.40	1,358.76	63.65	447.18	31.2
1965	83.92	578.47	219.80	1,515.10	63.10	434.95	31.8
1966	84.35	561.99	221.90	1,478.43	68.05	453.39	32.9
1967	85.37	552.01	224.40	1,450.99	70.15	453.60	33.9
1968	98.86	610.43	257.10	1,587.50	69.55	429.45	35.5
1969	100.40	583.76	255.80	1,487.30	73.90	429.68	37.7
1970	118.10	650.44	291.10	1,603.24	77.65	427.66	39.8
1971	132.17	704.91	320.00	1,706.67	77.50	413.33	41.1
1972	162.35	837.34	383.10	1,975.89	79.95	412.35	42.5
1973	166.42	789.59	391.00	1,855.13	76.15	361.30	46.2
1974	188.21	794.91	438.40	1,851.59	91.06	384.59	51.9
1975	207.18	818.27	468.60	1,850.76	90.93	359.13	55.5
1976	224.86	846.90	503.40	1,895.97	94.37	355.43	58.2
1977	243.00	857.74	546.60	1,929.38	96.62	341.05	62.1
1978	263.20	852.19	591.90	1,916.46	100.43	325.17	67.7
1979	294.30	841.08	655.00	1,871.92	122.67	350.58	76.7
1980	341.40	867.15	759.20	1,928.35	128.20	325.63	86.3
1981	385.97	900.05	858.00	2,000.78	137.81	321.36	94.0
1982	419.30	941.71	885.50	1,988.75	145.69	327.21	97.6
1983	440.77	953.77	923.00	1,997.25	157.89	341.65	101.3
1984	460.57	958.76	948.30	1,974.05	157.88	328.65	105.3
1985	478.62	959.87	981.50	1,968.39	164.26	329.42	109.3
1986	488.44	968.92	994.00	1,971.81	173.66	344.49	110.5
1987	512.65	973.77	1,032.30	1,960.83	180.64	343.12	115.4
1988	536.77	976.43	1,070.40	1,947.15	188.23	342.41	120.5
1989	566.85	985.36	1,120.04	1,946.97	198.81	345.59	126.1
1990	602.56	987.15	1,177.70	1,929.39	212.66	348.39	133.8
1991	629.32	1,000.34	1,216.76	1,934.11	221.30	351.77	137.9
1992	652.64	1,008.17	1,252.40	1,934.64	227.39	351.26	141.9
1993	674.06	1,013.40	1,282.60	1,928.30	236.52	355.59	145.8
1994	697.34	1,021.09	1,328.40	1,945.13	242.54	355.14	149.7
1995	719.80	1,027.88	1,365.50	1,949.95	250.65	357.93	153.5
1996	744.96	1,029.60	1,450.60	2,004.86	260.75	360.38	158.6
1997	774.84	1,052.98	1,502.60	2,041.97	268.46	364.83	161.3
1998	779.69	1,042.76	1,537.70	2,056.52	277.45	371.06	163.9
1999	804.30	1,047.55	1,590.40	2,071.39	289.19	376.65	168.3

(Continued)

Table 3.C4—Average monthly amount of Social Security and Supplemental Security Income, December 1950–2010 (in current and 2010 dollars)—Continued

Year	Average monthly Social Security benefit in current-payment status				Average monthly Supplemental Security Income amount for—		Consumer Price Index ^a
	Retired workers		Widowed mother or father and 2 children		Aged recipients ^b		
	Current dollars	2010 dollars	Current dollars	2010 dollars	Current dollars	2010 dollars	
2000	844.48	1,063.85	1,675.40	2,110.62	299.69	377.54	174.0
2001	874.44	1,084.76	1,755.10	2,177.24	314.22	389.80	176.7
2002	895.00	1,084.49	1,812.10	2,195.76	330.04	399.92	180.9
2003	922.08	1,096.69	1,880.97	2,237.16	342.28	407.10	184.3
2004	954.89	1,099.90	1,952.80	2,249.36	350.53	403.76	190.3
2005	1,002.00	1,116.05	2,061.30	2,295.92	360.25	401.25	196.8
2006	1,044.40	1,134.45	2,146.70	2,331.80	373.05	405.22	201.8
2007	1,078.60	1,125.85	2,221.10	2,318.41	384.15	400.98	210.0
2008	1,152.90	1,202.26	2,371.80	2,473.35	393.46	410.31	210.2
2009	1,164.30	1,182.10	2,403.30	2,440.03	399.14	405.24	215.9
2010	1,175.50	1,175.50	2,418.40	2,418.40	399.75	399.75	219.2

SOURCES: Social Security Administration, Master Beneficiary Record and Supplemental Security Record, 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. Through 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.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 1940–2010, 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	908	...	55	...	32	932	3.5	57.4
2004	926	...	54	...	31	950	3.3	57.0
2005	919	...	53	...	31	943	3.3	57.6
2006	919	...	53	...	30	942	3.3	57.1
2007	904	...	53	...	30	926	3.4	57.3
2008	898	...	52	...	30	921	3.3	56.8
2009	901	...	51	...	29	924	3.2	56.0
2010								
United States	894	...	50	...	28	940	3.1	56.2
Alabama	926	16	45	14	34	937	3.7	76.0
Alaska	893	38	54	10	33	914	3.7	61.3
Arizona	850	48	29	28	17	862	2.0	58.7
Arkansas	926	18	38	18	30	933	3.3	80.7
California	835	50	127	1	64	899	7.6	49.9
Colorado	881	42	27	32	15	893	1.7	55.7
Connecticut	906	33	26	35	13	919	1.4	49.2
Delaware	913	27	19	41	12	921	1.3	61.1
District of Columbia	759	51	61	5	35	785	4.7	57.8
Florida	840	49	48	11	25	863	2.9	51.1
Georgia	904	34	48	12	33	919	3.6	68.5
Hawaii	875	44	44	16	23	896	2.6	52.5
Idaho	939	8	19	43	14	945	1.5	72.3
Illinois	896	37	37	20	17	916	1.9	44.7
Indiana	946	6	15	49	10	952	1.1	66.5
Iowa	947	5	15	48	11	951	1.1	69.8
Kansas	918	23	18	45	11	925	1.2	63.4
Kentucky	919	20	56	8	40	935	4.3	71.8
Louisiana	883	40	57	7	42	899	4.7	72.6
Maine	931	12	25	37	19	936	2.1	77.9
Maryland	855	47	35	24	16	874	1.9	46.7
Massachusetts	884	39	56	9	29	911	3.2	51.7
Michigan	946	7	28	31	15	958	1.6	54.9
Minnesota	927	15	27	34	11	942	1.2	42.4
Mississippi	928	14	67	3	53	942	5.7	78.8

(Continued)

Table 3.C5—Population aged 65 or older receiving Social Security (OASDI) benefits, Supplemental Security Income (SSI) payments, or both, by state, December 1940–2010, 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				
2010 (cont.)								
Missouri	917	24	23	39	15	925	1.7	67.5
Montana	912	29	19	42	13	919	1.4	66.7
Nebraska	919	22	16	47	11	924	1.2	66.3
Nevada	868	46	32	26	18	882	2.1	57.4
New Hampshire	961	2	11	51	7	966	0.7	61.2
New Jersey	906	32	45	15	21	930	2.3	46.6
New Mexico	874	45	59	6	40	892	4.6	68.5
New York	879	43	90	2	44	925	5.0	48.9
North Carolina	917	25	35	22	26	926	2.9	74.8
North Dakota	923	19	17	46	12	928	1.3	71.3
Ohio	903	35	24	38	13	914	1.5	56.6
Oklahoma	919	21	29	29	21	927	2.3	72.6
Oregon	933	9	28	30	16	945	1.7	58.0
Pennsylvania	926	17	31	27	17	939	1.9	55.5
Rhode Island	930	13	47	13	28	948	3.1	60.9
South Carolina	931	11	35	23	26	940	2.8	75.4
South Dakota	981	1	25	36	16	991	1.6	61.9
Tennessee	932	10	38	19	27	942	2.9	72.7
Texas	882	41	64	4	43	902	4.9	67.2
Utah	909	30	18	44	9	917	1.0	52.0
Vermont	957	3	27	33	21	963	2.2	77.8
Virginia	897	36	34	25	20	912	2.2	57.7
Washington	916	26	36	21	14	938	1.6	39.0
West Virginia	908	31	39	17	26	920	2.9	68.2
Wisconsin	956	4	20	40	13	964	1.3	62.3
Wyoming	913	28	11	50	9	916	1.0	78.4

SOURCES: Social Security Administration, Master Beneficiary Record and Supplemental Security Record (Characteristic Extract Record format), and 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: (410) 965-0090 or statistics@ssa.gov.

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 2010

Type of benefit	All OASDI beneficiaries	Number receiving SSI			Percentage of all OASDI beneficiaries		
		Total	Aged	Blind and disabled	Total	Aged	Blind and disabled
Total	54,031,968	2,698,911	657,934	2,040,977	5.0	1.2	3.8
Retirement	37,489,475	1,102,887	567,886	535,001	2.9	1.5	1.4
Workers aged 65 or older	31,160,998	814,754	505,915	308,839	2.6	1.6	1.0
Men	15,884,654	345,656	212,097	133,559	2.2	1.3	0.8
Women	15,276,344	469,098	293,818	175,280	3.1	1.9	1.1
Workers aged 62–64	3,432,082	49,081	0	49,081	1.4	0	1.4
Men	1,697,581	29,476	0	29,476	1.7	0	1.7
Women	1,734,501	19,605	0	19,605	1.1	0	1.1
Wives and husbands	2,316,536	132,982	61,957	71,025	5.7	2.7	3.1
Aged 65 or older	2,069,699	121,156	61,957	59,199	5.9	3.0	2.9
Aged 62–64	210,524	11,069	0	11,069	5.3	0	5.3
Under age 62 with children	36,313	757	0	757	2.1	0	2.1
Disabled adult children	250,262	102,022	14	102,008	40.8	^a	40.8
Aged 65 or older	1,308	554	14	540	42.4	1.1	41.3
Aged 18–64	248,954	101,468	0	101,468	40.8	0	40.8
Children under age 18 and students aged 18–19	329,597	4,048	0	4,048	1.2	0	1.2
Survivors	6,358,336	402,792	88,350	314,442	6.3	1.4	4.9
Nondisabled widow(er)s	4,040,960	169,724	86,209	83,515	4.2	2.1	2.1
Aged 65 or older	3,585,010	164,168	86,209	77,959	4.6	2.4	2.2
Aged 60–64	455,950	5,556	0	5,556	1.2	0	1.2
Disabled widow(er)s	244,953	36,255	26	36,229	14.8	^a	14.8
Widowed mothers and fathers	158,061	3,296	15	3,281	2.1	^a	2.1
Parents	1,573	68	63	5	4.3	4.0	0.3
Disabled adult children	601,420	170,616	2,037	168,579	28.4	0.3	28.0
Aged 65 or older	76,222	21,855	2,037	19,818	28.7	2.7	26.0
Aged 18–64	525,198	148,761	0	148,761	28.3	0	28.3
Children under age 18 and students aged 18–19	1,311,369	22,833	0	22,833	1.7	0	1.7
Disability	10,184,157	1,193,232	1,698	1,191,534	11.7	^a	11.7
Workers	8,203,951	1,049,503	496	1,049,007	12.8	^a	12.8
Men	4,309,685	439,744	206	439,538	10.2	^a	10.2
Women	3,894,266	609,759	290	609,469	15.7	^a	15.7
Wives and husbands	160,300	11,473	1,202	10,271	7.2	0.7	6.4
Aged 65 or older	38,048	4,568	1,202	3,366	12.0	3.2	8.8
Aged 62–64	49,246	2,754	0	2,754	5.6	0	5.6
Under age 62 with children	73,006	4,151	0	4,151	5.7	0	5.7
Disabled adult children aged 18–64	97,518	67,039	0	67,039	68.7	0	68.7
Children under age 18 and students aged 18–19	1,722,388	65,217	0	65,217	3.8	0	3.8

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

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

OASDI = Old-Age, Survivors, and Disability Insurance.

a. Less than 0.05 percent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 1978–2010

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
2004	9,792,950	7,019,198	6,116,444	692,019	210,735	4,017,108	2,773,752	1,243,356
2005	10,094,657	7,298,737	6,385,405	700,331	213,001	4,082,870	2,795,920	1,286,950
2006	10,646,193	7,803,692	6,806,918	776,596	220,178	4,152,130	2,842,501	1,309,629
2007	11,000,748	8,118,382	7,098,723	794,677	224,982	4,221,920	2,882,366	1,339,554
2008	11,486,100	8,528,164	7,426,691	871,466	230,007	4,333,096	2,957,936	1,375,160
2009	11,997,296	8,945,376	7,788,013	920,883	236,480	4,451,288	3,051,920	1,399,368
2010	12,570,871	9,398,104	8,203,951	949,200	244,953	4,631,507	3,172,767	1,458,740

SOURCES: 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: (410) 965-0090 or statistics@ssa.gov.

3.C Interprogram Data

Table 3.C7a—Number of persons aged 15 or older reporting only one race and having Social Security (OASDI) benefits or Supplemental Security Income (SSI) in March 2011, by sex, age, and race, and average annual benefit in 2010

Sex and age	All persons		White	Black or African American	American Indian, Alaska Native	Asian	Native Hawaiian and Other Pacific Islander	
	Total	Reporting only one race						
Social Security beneficiaries (thousands)								
Total	44,514	44,037	38,073	4,540	245	1,123	57	
Sex								
Male	19,744	19,517	16,978	1,922	107	484	25	
Female	24,770	24,520	21,095	2,617	138	639	32	
Age								
15–54	4,921	4,813	3,654	1,026	51	72	10	
55–64	6,416	6,344	5,322	822	54	138	8	
65–74	17,161	16,979	14,860	1,483	73	537	27	
75 or older	16,016	15,900	14,236	1,209	66	376	13	
Supplemental Security Income recipients (thousands)								
Total	5,562	5,445	3,644	1,480	96	212	13	
Sex								
Male	2,360	2,310	1,619	563	45	76	6	
Female	3,202	3,136	2,026	917	51	136	7	
Age								
15–54	3,163	3,090	2,066	896	67	53	8	
55–64	1,330	1,298	888	366	14	29	1	
65–74	573	566	364	128	9	64	1	
75 or older	496	491	327	90	5	66	3	
Average annual benefit in 2010 (dollars)								
Social Security	12,870	12,884	13,105	11,367	11,325	11,924	a	
Supplemental Security Income	7,129	7,137	7,147	7,158	6,887	6,882	a	

SOURCE: Census Bureau, Current Population Survey, public-use file of the March 2011 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 Census Bureau, *Current Population Reports*, Series P-60.

Totals do not necessarily equal the sum of rounded components.

OASDI = Old-Age, Survivors, and Disability Insurance.

a. Average benefits are not shown for fewer than 75,000 weighted cases.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 3.C7b—Number of persons aged 15 or older reporting one or more races and having Social Security (OASDI) benefits or Supplemental Security Income (SSI) in March 2011, by sex, age, and race, and average annual benefit in 2010

Sex and age	All persons			White alone or in combination	Black or African American alone or in combination	American Indian, Alaska Native alone or in combination	Asian alone or in combination	Native Hawaiian and Other Pacific Islander alone or in combination
	Total	Reporting only one race	Reporting two or more races					
Social Security beneficiaries (thousands)								
Total ^a	44,514	44,037	477	38,495	4,690	584	1,165	77
Sex								
Male	19,744	19,517	227	17,184	1,994	266	502	35
Female	24,770	24,520	250	21,312	2,696	318	663	42
Age								
15–54	4,921	4,813	108	3,746	1,063	115	89	15
55–64	6,416	6,344	72	5,392	839	107	142	9
65–74	17,161	16,979	181	15,018	1,542	208	548	35
75 or older	16,016	15,900	116	14,339	1,246	154	386	18
Supplemental Security Income recipients (thousands)								
Total ^a	5,562	5,445	117	3,745	1,506	182	226	20
Sex								
Male	2,360	2,310	50	1,660	576	82	83	8
Female	3,202	3,136	67	2,085	929	100	143	12
Age								
15–54	3,163	3,090	73	2,129	920	117	61	11
55–64	1,330	1,298	31	914	367	41	33	5
65–74	573	566	7	371	128	16	64	1
75 or older	496	491	5	332	90	8	68	3
Average annual benefit in 2010 (dollars)								
Social Security	12,870	12,884	11,628	13,090	11,336	11,690	11,947	11,620
Supplemental Security Income	7,129	7,137	6,784	7,132	7,184	6,569	6,935	^b

SOURCE: Census Bureau, Current Population Survey, public-use file of the March 2011 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 Census Bureau, *Current Population Reports*, Series P-60.

Totals do not necessarily equal the sum of rounded components.

"In combination" means in combination with one or more other races.

OASDI = Old-Age, Survivors, and Disability Insurance.

- a. The sum of the five race groups adds to more than the total because individuals may report more than one race.
b. Average benefits are not shown for fewer than 75,000 weighted cases.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2011, by age and sex, and average annual benefit in 2010

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	44,514	19,744	24,770	3,087	1,367	1,720	6.9	6.9	6.9
15–34	1,558	729	829	200	99	101	12.8	13.6	12.2
35–44	1,123	508	615	111	49	62	9.9	9.6	10.1
45–54	2,240	1,087	1,153	205	100	106	9.2	9.2	9.2
55–64	6,416	3,034	3,383	517	231	286	8.1	7.6	8.4
65–74	17,161	7,870	9,290	1,147	493	654	6.7	6.3	7.0
75 or older	16,016	6,516	9,501	907	396	511	5.7	6.1	5.4
Supplemental Security Income recipients									
Total, all ages	5,562	2,360	3,202	868	366	503	15.6	15.5	15.7
15–34	1,266	637	629	222	116	107	17.6	18.2	16.9
35–44	725	303	422	114	48	66	15.7	15.7	15.7
45–54	1,172	523	649	154	61	93	13.1	11.6	14.3
55–64	1,330	554	776	163	75	88	12.2	13.5	11.3
65–74	573	193	380	117	40	76	20.4	20.9	20.1
75 or older	496	149	346	99	26	73	20.0	17.4	21.1
Average annual benefit in 2010 (dollars)									
Social Security	12,870	14,633	11,465	10,629	12,132	9,434	...	...	...
Supplemental Security Income	7,129	7,716	6,697	7,147	8,227	6,361	...	...	...

SOURCE: Census Bureau, Current Population Survey, public-use file of the March 2011 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 Census Bureau, *Current Population Reports*, Series P-60.

Totals do not necessarily equal the sum of rounded components.

OASDI = Old-Age, Survivors, and Disability Insurance; ... = not applicable.

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 3.E1—Weighted average poverty thresholds for nonfarm families, by size, 1959–2010 (in dollars)

Year	Unrelated individuals			Families										Annual average CPI ^a
				2 persons			3 persons	4 persons	5 persons	6 persons	7 persons	8 persons	9 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	...	...	...	29.2
1960	1,490	1,526	1,418	1,924	1,982	1,788	2,359	3,022	3,560	4,002	...	...	...	29.6
1961	1,506	1,545	1,433	1,942	2,005	1,808	2,383	3,054	3,597	4,041	...	...	...	29.9
1962	1,519	1,562	1,451	1,962	2,027	1,828	2,412	3,089	3,639	4,088	...	...	...	30.3
1963	1,539	1,581	1,470	1,988	2,052	1,850	2,442	3,128	3,685	4,135	...	...	...	30.6
1964	1,558	1,601	1,488	2,015	2,079	1,875	2,473	3,169	3,732	4,193	...	...	...	31.0
1965	1,582	1,626	1,512	2,048	2,114	1,906	2,514	3,223	3,797	4,264	...	...	...	31.5
1966	1,628	1,674	1,556	2,107	2,175	1,961	2,588	3,317	3,908	4,388	...	...	...	32.5
1967	1,675	1,722	1,600	2,168	2,238	2,017	2,661	3,410	4,019	4,516	...	...	...	33.4
1968	1,748	1,797	1,667	2,262	2,333	2,102	2,774	3,553	4,188	4,706	...	...	...	34.8
1969	1,840	1,893	1,757	2,383	2,458	2,215	2,924	3,743	4,415	4,958	...	...	...	36.7
1970	1,954	2,010	1,861	2,525	2,604	2,348	3,099	3,968	4,680	5,260	...	...	...	38.8
1971	2,040	2,098	1,940	2,633	2,716	2,448	3,229	4,137	4,880	5,489	...	...	...	40.5
1972	2,109	2,168	2,005	2,724	2,808	2,530	3,339	4,275	5,044	5,673	...	...	...	41.8
1973	2,247	2,307	2,130	2,895	2,984	2,688	3,548	4,540	5,358	6,028	...	...	...	44.4
1974	2,495	2,562	2,364	3,211	3,312	2,982	3,936	5,038	5,950	6,699	...	...	...	49.3
1975	2,724	2,797	2,581	3,506	3,617	3,257	4,293	5,500	6,499	7,316	...	...	...	53.8
1976	2,884	2,959	2,730	3,711	3,826	3,445	4,540	5,815	6,876	7,760	...	...	...	56.9
1977	3,075	3,152	2,906	3,951	4,072	3,666	4,833	6,191	7,320	8,261	...	...	...	60.6
1978	3,311	3,392	3,127	4,249	4,383	3,944	5,201	6,662	7,880	8,891	...	...	...	65.2
1979	3,689	3,778	3,479	4,725	4,878	4,390	5,784	7,412	8,775	9,914	...	...	...	72.6
1980	4,190	4,290	3,949	5,363	5,537	4,983	6,565	8,414	9,966	11,269	12,761	14,199	16,896	82.4
1981	4,620	4,729	4,359	5,917	6,111	5,498	7,250	9,287	11,007	12,449	14,110	15,655	18,572	90.9
1982	4,901	5,019	4,626	6,281	6,487	5,836	7,693	9,862	11,684	13,207	15,036	16,719	19,698	96.5
1983	5,061	5,180	4,775	6,483	6,697	6,023	7,938	10,178	12,049	13,630	15,500	17,170	20,310	99.6
1984	5,278	5,400	4,979	6,762	6,983	6,282	8,277	10,609	12,566	14,207	16,096	17,961	21,247	103.9
1985	5,469	5,593	5,156	6,998	7,231	6,503	8,573	10,989	13,007	14,696	16,656	18,512	22,083	107.6
1986	5,572	5,701	5,255	7,138	7,372	6,630	8,737	11,203	13,259	14,986	17,049	18,791	22,497	109.6
1987	5,778	5,909	5,447	7,397	7,641	6,872	9,056	11,611	13,737	15,509	17,649	19,515	23,105	113.6
1988	6,022	6,155	5,674	7,704	7,958	7,157	9,435	12,092	14,304	16,146	18,232	20,253	24,129	118.3
1989	6,310	6,451	5,947	8,076	8,343	7,501	9,885	12,674	14,990	16,921	19,162	21,328	25,480	124.0
1990	6,652	6,800	6,268	8,509	8,794	7,905	10,419	13,359	15,792	17,839	20,241	22,582	26,848	130.7
1991	6,932	7,086	6,532	8,865	9,165	8,241	10,860	13,924	16,456	18,587	21,058	23,605	27,942	136.2
1992	7,143	7,299	6,729	9,137	9,443	8,487	11,186	14,335	16,952	19,137	21,594	24,053	28,745	140.3
1993	7,363	7,518	6,930	9,414	9,728	8,740	11,522	14,763	17,449	19,718	22,383	24,838	29,529	144.5
1994	7,547	7,710	7,108	9,661	9,976	8,967	11,821	15,141	17,900	20,235	22,923	25,427	30,300	148.2
1995	7,763	7,929	7,309	9,933	10,259	9,219	12,158	15,569	18,408	20,804	23,552	26,237	31,280	152.4
1996	7,995	8,163	7,525	10,233	10,564	9,491	12,516	16,036	18,952	21,389	24,268	27,091	31,971	156.9
1997	8,183	8,350	7,698	10,473	10,805	9,712	12,802	16,400	19,380	21,886	24,802	27,593	32,566	160.5
1998	8,316	8,480	7,818	10,634	10,972	9,862	13,003	16,660	19,680	22,228	25,257	28,166	33,339	163.0
1999	8,501	8,667	7,990	10,869	11,214	10,075	13,290	17,029	20,127	22,727	25,912	28,967	34,417	166.6

(Continued)

3.E Poverty

Table 3.E1—Weighted average poverty thresholds for nonfarm families, by size, 1959–2010 (in dollars)—Continued

Year	Unrelated individuals			Families										Annual average CPI ^a
	All ages	Under age 65	Aged 65 or older	2 persons			3 persons	4 persons	5 persons	6 persons	7 persons	8 persons	9 persons or more	
				All ages	Householder under age 65	Householder aged 65 or older								
2000	8,794	8,959	8,259	11,239	11,590	10,419	13,738	17,603	20,819	23,528	26,754	29,701	35,060	172.2
2001	9,039	9,214	8,494	11,569	11,920	10,715	14,128	18,104	21,405	24,195	27,517	30,627	36,286	177.1
2002	9,183	9,359	8,628	11,756	12,110	10,885	14,348	18,392	21,744	24,576	28,001	30,907	37,062	179.9
2003	9,393	9,573	8,825	12,015	12,384	11,133	14,680	18,810	22,245	25,122	28,544	31,589	37,656	184.0
2004	9,645	9,827	9,060	12,334	12,714	11,430	15,067	19,307	22,831	25,788	29,236	32,641	39,048	188.9
2005	9,973	10,160	9,367	12,755	13,145	11,815	15,577	19,971	23,613	26,683	30,249	33,610	40,288	195.3
2006	10,294	10,488	9,669	13,167	13,569	12,201	16,079	20,614	24,382	27,560	31,205	34,774	41,499	201.6
2007	10,590	10,787	9,944	13,540	13,954	12,550	16,530	21,203	25,080	28,323	32,233	35,816	42,739	207.3
2008	10,991	11,201	10,326	14,051	14,489	13,030	17,163	22,025	26,049	29,456	33,529	37,220	44,346	215.3
2009	10,956	11,161	10,289	13,991	14,439	12,982	17,098	21,954	25,991	29,405	33,372	37,252	44,366	214.5
2010	11,139	11,344	10,458	14,218	14,676	13,194	17,374	22,314	26,439	29,897	34,009	37,934	45,220	218.1

SOURCE: Census Bureau, Current Population Survey.

NOTES: CPI = Consumer Price Index; . . . = not applicable.

Poverty thresholds in dollars for larger families before 1981 are:

Year	7 persons or more
1959	4,849
1960	4,921
1961	4,967
1962	5,032
1963	5,092
1964	5,156
1965	5,248
1966	5,395
1967	5,550
1968	5,789
1969	6,101
1970	6,468
1971	6,751
1972	6,983
1973	7,435
1974	8,253
1975	9,022
1976	9,588
1977	10,216
1978	11,002
1979	12,280
1980	13,955

Beginning with poverty reports for 1981, the Census Bureau discontinued making distinctions based on householder's sex or between farm and nonfarm families of the same size and composition. Additionally, larger Current Population Survey samples permitted separate poverty income criteria for families of 7, 8, and 9 or more persons. The Social Security Administration developed separate criteria for these larger families by number of children for the base year 1978 on the same basis as the original poverty matrix for smaller families, and has since updated the criteria by means of the all-items CPI. For additional details, see Census Bureau's *Current Population Reports* Series P-60, No. 133, "Characteristics of the Population Below the Poverty Level, 1980."

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.

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Table 3.E2—Number and percentage of poor persons, by age, at end of selected years 1959–2010

Age and family status ^a	1959	1970	1980	1985	1990 ^b	1995	2000	2005	2010
Total population ^c (millions)									
All ages	176.5	202.5	225.0	236.6	248.6	263.7	275.9	293.1	305.7
Children under 18 in families—	64.0	69.9	62.2	62.0	64.9	70.3	70.6	72.0	73.0
With male householder ^d	58.3	60.8	50.6	49.5	49.5	52.1	54.5	54.4	53.5
With female householder	5.7	9.0	11.5	12.5	15.4	18.2	16.1	17.6	19.6
18–54 ^e	81.0	94.9	116.3	125.2	132.3	140.7	147.4	153.6	155.1
55–64	15.5	18.4	21.7	22.1	21.3	21.1	23.8	31.0	37.0
65 or older	15.6	19.3	24.7	27.3	30.1	31.7	33.0	35.5	39.2
In families	11.9	13.4	16.7	18.4	20.1	21.1	22.3	23.8	26.6
Unrelated individuals	3.7	5.8	8.0	8.9	10.0	10.6	10.7	11.7	12.5
Men	1.2	1.4	1.7	2.0	2.3	2.7	2.9	3.4	3.9
Women	2.5	4.4	6.3	7.0	7.7	7.9	7.8	8.3	8.6
Number poor ^c (millions)									
All ages	39.5	25.3	29.3	33.1	33.6	36.4	31.1	36.9	46.2
Children under 18 in families—	17.2	10.5	11.1	12.5	13.3	14.4	11.1	12.3	15.7
With male householder ^d	13.1	5.7	5.2	5.8	5.3	5.6	4.9	5.0	6.9
With female householder	4.1	4.8	5.9	6.7	8.0	8.9	6.2	7.3	8.8
18–54 ^e	13.4	8.2	12.2	14.8	14.6	16.5	14.1	18.0	22.6
55–64	3.3	2.1	2.1	2.3	2.1	2.2	2.2	2.7	3.7
65 or older	5.5	4.7	3.9	3.5	3.7	3.3	3.4	3.6	3.5
In families	3.2	2.0	1.4	1.2	1.2	1.1	1.1	1.3	1.4
Unrelated individuals	2.3	2.7	2.4	2.3	2.5	2.3	2.2	2.3	2.1
Men	0.7	0.5	0.4	0.4	0.4	0.4	0.5	0.5	0.6
Women	1.6	2.2	2.0	1.9	2.1	1.9	1.7	1.7	1.5
Percentage poor ^c									
All ages	22.4	12.6	13.0	14.0	13.5	13.8	11.3	12.6	15.1
Children under 18 in families—	26.9	15.0	17.9	20.1	20.5	20.5	15.7	17.1	21.4
With male householder ^d	22.4	9.3	10.4	11.7	10.7	10.7	8.9	9.2	12.8
With female householder	72.2	53.4	50.8	53.6	52.1	48.6	38.4	41.6	45.0
18–54 ^e	16.5	8.7	10.5	11.8	11.0	11.7	9.6	11.7	14.6
55–64	21.5	11.4	9.5	10.5	9.7	10.2	9.4	8.7	10.1
65 or older	35.2	24.6	15.7	12.6	12.2	10.5	10.2	10.1	9.0
In families	26.9	14.7	8.5	6.4	5.9	5.0	5.1	5.6	5.3
Unrelated individuals	61.9	47.1	30.6	25.6	24.8	21.4	20.8	19.5	16.7
Men	59.0	38.9	24.4	20.5	17.3	14.3	18.3	15.6	14.6
Women	63.3	49.7	32.3	27.0	26.9	23.8	21.8	21.1	17.7

SOURCES: Census Bureau, Current Population Survey, public-use file of the March 2011 Income Supplement. Data for 1970 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 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: (410) 965-0090 or statistics@ssa.gov.

3.E Poverty

Table 3.E3—Shares of money income from earnings and other sources for aged and nonaged families, 2010

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	Poor ^a	Nonpoor	Total	Poor ^a	Nonpoor	Total	Poor ^a	Nonpoor	Total	Poor ^a	Nonpoor
Number of families and unrelated individuals (millions)	12.5	2.1	10.4	13.5	0.8	12.7	41.6	10.5	31.1	65.2	8.5	56.7
	Percentage receiving income of specified type ^b											
Earnings	17.5	3.5	20.0	46.7	19.1	48.2	82.8	51.4	90.0	93.0	68.5	96.3
Public program payments												
Social Security ^c	89.9	83.6	91.0	89.7	77.2	90.4	8.1	14.4	6.6	12.4	12.6	12.3
Supplemental Security Income	4.2	15.6	2.2	3.8	13.6	3.2	4.4	17.0	1.5	3.6	10.6	2.6
Other public assistance	2.1	2.6	2.0	3.8	5.8	3.7	10.3	19.3	8.2	12.7	23.9	11.2
Other programs ^d	4.5	2.5	4.8	9.9	6.3	10.1	10.1	8.0	10.6	14.6	13.3	14.7
Other sources												
Dividends, interest, rent	51.1	23.3	56.0	60.7	24.9	62.6	38.2	17.6	43.0	49.9	10.6	55.2
Employment-related pensions, alimony, annuities	40.3	7.3	46.2	49.0	10.9	51.0	6.5	3.7	7.2	14.8	14.4	14.8
	Percentage distribution of income, by type											
Total percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Earnings	20.8	1.1	21.6	38.1	12.6	38.3	86.6	45.3	87.9	89.1	63.6	89.5
Public program payments												
Social Security ^c	42.9	83.4	41.2	31.1	70.2	30.8	2.4	17.2	1.9	2.2	10.0	2.1
Supplemental Security Income	0.7	8.6	0.3	0.5	6.7	0.4	0.9	17.7	0.3	0.4	6.6	0.3
Other public assistance	0.3	0.5	0.3	0.5	1.6	0.4	2.1	10.3	1.8	1.0	8.0	0.9
Other programs ^d	1.6	1.1	1.6	1.8	1.9	1.8	2.3	5.7	2.2	1.6	6.6	1.5
Other sources												
Dividends, interest, rent	12.6	1.9	13.0	10.4	2.1	10.4	3.0	1.6	3.1	2.8	0.6	2.8
Employment-related pensions, alimony, annuities	21.2	3.3	21.9	17.7	4.8	17.8	2.7	2.2	2.8	2.9	4.7	2.9
Median income (dollars)	19,085	8,405	21,559	46,000	10,699	48,252	29,000	7,272	35,000	65,000	11,800	73,001

SOURCE: Census Bureau, Current Population Survey, public-use file of the March 2011 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 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 2010. 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.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 3.E4—Current living arrangements of persons aged 65 or older, by sex and poverty status, March 2011

Living arrangement	Population (thousands)			Percentage distribution			Percentage officially poor
	Total	Poor	Nonpoor	Total	Poor	Nonpoor	
<i>All persons aged 65 or older</i>							
Total	39,179	3,521	35,658	100.0	100.0	100.0	9.0
Unrelated individuals	12,518	2,100	10,418	32.0	59.6	29.2	16.8
Family members	26,661	1,421	25,240	68.0	40.4	70.8	5.3
Householder or spouse	24,209	1,257	22,953	61.8	35.7	64.4	5.2
Other relative ^a	2,451	164	2,287	6.3	4.7	6.4	6.7
Poor by own income	1,028	119	909	2.6	3.4	2.5	11.5
Not poor by own income	1,424	46	1,378	3.6	1.3	3.9	3.2
<i>Men</i>							
Subtotal	17,081	1,153	15,928	43.6	32.7	44.7	6.7
Unrelated individuals	3,862	563	3,299	9.9	16.0	9.3	14.6
Family members	13,219	589	12,630	33.7	16.7	35.4	4.5
Householder	8,227	334	7,894	21.0	9.5	22.1	4.1
Spouse of householder	4,360	216	4,144	11.1	6.1	11.6	5.0
Other relative ^a	631	39	592	1.6	1.1	1.7	6.2
Poor by own income	217	34	183	0.6	1.0	0.5	15.8
Not poor by own income	414	5	409	1.1	0.1	1.1	1.2
<i>Women</i>							
Subtotal	22,098	2,368	19,730	56.4	67.3	55.3	10.7
Unrelated individuals	8,656	1,537	7,120	22.1	43.6	20.0	17.8
Family members	13,442	831	12,610	34.3	23.6	35.4	6.2
Householder, no husband present	1,970	306	1,664	5.0	8.7	4.7	15.5
Householder with husband present	3,565	152	3,413	9.1	4.3	9.6	4.3
Wife of householder	6,087	249	5,838	15.5	7.1	16.4	4.1
Other relative ^a	1,820	125	1,695	4.6	3.5	4.8	6.9
Poor by own income	811	84	726	2.1	2.4	2.0	10.4
Not poor by own income	1,009	41	969	2.6	1.2	2.7	4.0

SOURCE: Census Bureau, Current Population Survey, public-use file of the March 2011 Income Supplement.

NOTES: Living arrangements as of March 2011.

Poverty status in 2010 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.

Totals do not necessarily equal the sum of rounded components.

For a discussion of standard errors of estimated numbers and percentages, see 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: (410) 965-0090 or statistics@ssa.gov.

3.E Poverty

Table 3.E6—Percentage distribution of aged families receiving Social Security benefits, by share of income from benefits and race, 2010

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	Poor	Nonpoor	Percent poor	Total	Poor	Nonpoor	Percent poor
All races ^b								
Number (thousands)	12,509	2,093	10,416	...	13,469	770	12,699	...
Percent	100.0	100.0	100.0	16.7	100.0	100.0	100.0	5.7
No Social Security benefits	11.9	26.3	9.0	37.0	10.8	30.9	9.6	16.3
Some Social Security benefits	88.1	73.7	91.0	14.0	89.2	69.1	90.4	4.4
Less than one-fourth of income	8.4	0.4	10.0	0.8	21.2	1.1	22.4	0.3
One-fourth to one-half of income	16.6	1.4	19.7	1.4	24.7	4.7	25.9	1.1
One-half to three-fourths of income	16.0	5.3	18.1	5.5	17.7	11.0	18.1	3.6
Three-fourths or more of income	47.1	66.6	43.2	23.7	25.6	52.2	24.0	11.7
White only								
Number (thousands)	10,866	1,588	9,278	...	11,656	532	11,124	...
Percent	100.0	100.0	100.0	14.6	100.0	100.0	100.0	4.6
No Social Security benefits	10.9	25.6	8.4	34.1	9.9	29.5	8.9	13.6
Some Social Security benefits	89.1	74.4	91.6	12.2	90.1	70.5	91.1	3.6
Less than one-fourth of income	8.8	0.3	10.3	0.5	20.9	1.3	21.8	0.3
One-fourth to one-half of income	17.1	1.4	19.8	1.2	25.1	4.2	26.1	0.8
One-half to three-fourths of income	16.5	5.1	18.4	4.5	18.2	10.0	18.6	2.5
Three-fourths or more of income	46.7	67.6	43.1	21.2	25.9	54.9	24.5	9.7
Black only								
Number (thousands)	1,233	380	853	...	1,164	156	1,008	...
Percent	100.0	100.0	100.0	30.8	100.0	100.0	100.0	13.4
No Social Security benefits	17.1	24.5	13.8	44.1	15.0	30.0	12.7	26.7
Some Social Security benefits	82.9	75.5	86.2	28.1	85.0	70.0	87.3	11.0
Less than one-fourth of income	5.0	1.0	6.8	6.3	21.3	0.9	24.5	0.6
One-fourth to one-half of income	12.4	1.1	17.5	2.8	22.1	8.1	24.3	4.9
One-half to three-fourths of income	13.0	6.3	16.0	14.9	16.3	14.1	16.7	11.5
Three-fourths or more of income	52.4	67.1	45.9	39.4	25.2	47.0	21.8	24.9

SOURCE: Census Bureau, Current Population Survey, public-use file of the March 2011 Income Supplement.

NOTES: Civilian noninstitutionalized population residing in the 50 states and the District of Columbia.

Totals do not necessarily equal the sum of rounded components.

For a discussion of standard errors of estimated numbers and percentages, see Census Bureau, *Current Population Reports*, Series P-60.

... = not applicable.

a. Payments under Social Security program any time in 2010 to any family member as reported in the March 2011 Current Population Survey.

b. Includes other races.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 3.E8—Poverty guidelines for families of specified size, 1965–2011 (in 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
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

(Continued)

3.E Poverty

Table 3.E8—Poverty guidelines for families of specified size, 1965–2011 (in 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 2005	9,570	12,830	16,090	19,350	22,610	25,870	29,130	32,390	3,260
January 2006	9,800	13,200	16,600	20,000	23,400	26,800	30,200	33,600	3,400
January 2007	10,210	13,690	17,170	20,650	24,130	27,610	31,090	34,570	3,480
January 2008	10,400	14,000	17,600	21,200	24,800	28,400	32,000	35,600	3,600
January 2009	10,830	14,570	18,310	22,050	25,790	29,530	33,270	37,010	3,740
January 2010	10,830	14,570	18,310	22,050	25,790	29,530	33,270	37,010	3,740
January 2011	10,890	14,710	18,530	22,350	26,170	29,990	33,810	37,630	3,820

SOURCES: Department of Health and Human Services, *Federal Register*, vol. 76, no. 13 (January 20, 2011), pp. 3637–3638; earlier *Federal Register* notices (1968–2010); and Israel Putnam, "Poverty Thresholds: Their History and Future Development" [November 1970], p. 281 in Mollie Orshansky [editor], *Documentation of Background Information and Rationale for Current Poverty Matrix* (Technical Paper I of *The Measure of Poverty*), Washington, D.C., U.S. Department of Health, Education, and Welfare, 1977.

NOTES: Except for Alaska and Hawaii. Guidelines for Alaska and Hawaii since 1980 are:

Year	Alaska		Hawaii	
	1 person	Increment	1 person	Increment
1980	4,760	1,520	4,370	1,400
1981	5,410	1,720	4,980	1,580
1982	5,870	1,920	5,390	1,770
1983	6,080	2,100	5,600	1,930
1984	6,240	2,170	5,730	2,000
1985	6,560	2,250	6,040	2,070
1986	6,700	2,350	6,170	2,160
1987	6,860	2,380	6,310	2,190
1988	7,210	2,450	6,650	2,250
1989	7,480	2,550	6,870	2,350
1990	7,840	2,680	7,230	2,460
1991	8,290	2,820	7,610	2,600
1992	8,500	2,980	7,830	2,740
1993	8,700	3,080	8,040	2,820
1994	9,200	3,100	8,470	2,850
1995	9,340	3,200	8,610	2,940
1996	9,660	3,280	8,910	3,010
1997	9,870	3,400	9,070	3,130
1998	10,070	3,500	9,260	3,220
1999	10,320	3,520	9,490	3,240
2000	10,430	3,630	9,590	3,340
2001	10,730	3,780	9,890	3,470
2002	11,080	3,850	10,200	3,540
2003	11,210	3,930	10,330	3,610
2004	11,630	3,980	10,700	3,660
2005	11,950	4,080	11,010	3,750
2006	12,250	4,250	11,270	3,910
2007	12,770	4,350	11,750	4,000
2008	13,000	4,500	11,960	4,140
2009	13,530	4,680	12,460	4,300
2010	13,530	4,680	12,460	4,300
2011	13,600	4,780	12,540	4,390

Separate figures for Alaska and Hawaii reflect Office of Economic Opportunity administrative practice beginning in the 1966–1970 period. The 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 is the same for all family sizes in each year's set of guidelines.

CONTACT: Gordon Fisher (202) 690-7507 or statistics@ssa.gov.



Old-Age, Survivors, and Disability Insurance

Trust Funds	4.1
Covered Workers	4.12
Insured Workers	4.38

Table 4.A1—Old-Age and Survivors Insurance, 1937–2010 (in millions of dollars)

Year	Receipts ^a					Expenditures				Assets	
	Total	Net payroll tax contributions ^b	Income from taxation of benefits	Reimbursements from the general fund of the Treasury ^c	Net interest ^d	Total	Benefit payments ^e	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
1941	845	789	...	...	56	114	88	26	...	731	2,762
1942	1,085	1,012	...	...	72	159	131	28	...	926	3,688
1943	1,328	1,239	...	...	88	195	166	29	...	1,132	4,820
1944	1,422	1,316	...	...	107	238	209	29	...	1,184	6,005
1945	1,420	1,285	...	...	134	304	274	30	...	1,116	7,121
1946	1,447	1,295	...	...	152	418	378	40	...	1,029	8,150
1947	1,722	1,557	...	1	164	512	466	46	...	1,210	9,360
1948	1,969	1,685	...	3	281	607	556	51	...	1,362	10,722
1949	1,816	1,666	...	4	146	721	667	54	...	1,094	11,816
1950	2,928	2,667	...	4	257	1,022	961	61	...	1,905	13,721
1951	3,784	3,363	...	4	417	1,966	1,885	81	...	1,818	15,540
1952	4,184	3,819	...	...	365	2,282	2,194	88	...	1,902	17,442
1953	4,359	3,945	...	...	414	3,094	3,006	88	...	1,265	18,707
1954	5,610	5,163	...	...	447	3,741	3,670	92	-21	1,869	20,576
1955	6,167	5,713	...	...	454	5,079	4,968	119	-7	1,087	21,663
1956	6,697	6,172	...	...	526	5,841	5,715	132	-5	856	22,519
1957	7,381	6,825	...	...	556	7,507	7,347	162	-2	-126	22,393
1958	8,117	7,566	...	...	552	8,646	8,327	194	124	-528	21,864
1959	8,584	8,052	...	...	532	10,308	9,842	184	282	-1,724	20,141
1960	11,382	10,866	...	...	516	11,198	10,677	203	318	184	20,324
1961	11,833	11,285	...	...	548	12,432	11,862	239	332	-599	19,725
1962	12,585	12,059	...	...	526	13,973	13,356	256	361	-1,388	18,337
1963	15,063	14,541	...	...	521	14,920	14,217	281	423	143	18,480
1964	16,258	15,689	...	...	569	15,613	14,914	296	403	645	19,125
1965	16,610	16,017	...	...	593	17,501	16,737	328	436	-890	18,235
1966	21,302	20,580	...	78	644	18,967	18,267	256	444	2,335	20,570
1967	24,034	23,138	...	78	818	20,382	19,468	406	508	3,652	24,222
1968	25,040	23,719	...	382	939	23,557	22,643	476	438	1,483	25,704
1969	29,554	27,947	...	442	1,165	25,176	24,210	474	491	4,378	30,082
1970	32,220	30,256	...	449	1,515	29,848	28,798	471	579	2,371	32,454
1971	35,877	33,723	...	488	1,667	34,542	33,414	514	613	1,335	33,789
1972	40,050	37,781	...	475	1,794	38,522	37,124	674	724	1,528	35,318
1973	48,344	45,975	...	442	1,928	47,175	45,745	647	783	1,169	36,487
1974	54,688	52,081	...	447	2,159	53,397	51,623	865	909	1,291	37,777
1975	59,605	56,816	...	425	2,364	60,395	58,517	896	982	-790	36,987
1976	66,276	63,362	...	614	2,301	67,876	65,705	959	1,212	-1,600	35,388
1977	72,412	69,572	...	613	2,227	75,309	73,121	981	1,208	-2,897	32,491
1978	78,094	75,471	...	615	2,008	83,064	80,361	1,115	1,589	-4,971	27,520
1979	90,274	87,919	...	557	1,797	93,133	90,573	1,113	1,448	-2,860	24,660
1980	105,841	103,456	...	540	1,845	107,678	105,083	1,154	1,442	-1,837	22,823
1981	125,361	122,627	...	675	2,060	126,695	123,803	1,307	1,585	-1,334	21,490
1982	125,198	123,673	...	680	845	142,119	138,806	1,519	1,793	^f 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	159,515	2,835	4,712	2,266	161,883	157,841	1,638	2,404	7,445	27,117
1985	184,239	175,128	3,208	4,032	1,871	171,150	167,248	1,592	2,310	^f 8,725	35,842
1986	197,393	189,136	3,424	1,764	3,069	181,000	176,813	1,601	2,585	^f 3,239	39,081
1987	210,736	201,092	3,257	1,697	4,690	187,668	183,587	1,524	2,557	23,068	62,149
1988	240,770	227,683	3,384	2,134	7,568	200,020	195,454	1,776	2,790	40,750	102,899
1989	264,653	248,128	2,439	2,101	11,985	212,489	207,971	1,673	2,845	52,164	155,063
1990	286,653	266,110	4,848	-668	16,363	227,519	222,987	1,563	2,969	59,134	214,197
1991	299,286	272,477	5,864	115	20,829	245,634	240,467	1,792	3,375	53,652	267,849
1992	311,162	281,132	5,852	-126	24,303	259,861	254,883	1,830	3,148	51,301	319,150
1993	323,277	290,865	5,335	50	27,027	273,104	267,755	1,996	3,353	50,173	369,322
1994	328,271	293,316	4,995	13	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, 1937–2010 (in millions of dollars)—Continued

Year	Receipts ^a					Expenditures				Assets	
	Total	Net payroll tax contributions ^b	Income from taxation of benefits	Reimbursements from the general fund of the Treasury ^c	Net interest ^d	Total	Benefit payments ^e	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of year
1995	342,801	304,659	5,490	-168	32,820	297,760	291,630	2,077	4,052	45,041	458,502
1996	363,741	321,555	6,471	9	35,706	308,217	302,861	1,802	3,554	55,524	514,026
1997	397,169	349,945	7,426	3	39,795	322,073	316,257	2,128	3,688	75,096	589,121
1998	424,848	371,206	9,149	2	44,491	332,324	326,762	1,899	3,662	92,524	681,645
1999	457,040	396,352	10,899	1	49,789	339,874	334,383	1,809	3,681	117,167	798,812
2000	490,513	421,390	11,594	1	57,529	358,339	352,652	2,149	3,538	132,174	930,986
2001	518,100	441,458	11,903	1	64,737	377,546	372,312	1,961	3,273	140,554	1,071,540
2002	539,706	455,198	12,909	415	71,184	393,749	388,119	2,137	3,493	145,957	1,217,497
2003	543,811	456,077	12,497	9	75,237	405,978	399,845	2,553	3,580	137,833	1,355,330
2004	566,338	472,758	14,593	1	78,986	421,047	415,034	2,384	3,628	145,292	1,500,622
2005	604,335	506,862	13,843	-350	83,979	441,920	435,383	2,957	3,579	162,415	1,663,037
2006	642,231	534,786	15,628	9	91,817	460,965	454,496	3,010	3,458	181,266	1,844,304
2007	675,035	560,877	17,192	9	96,966	495,723	489,074	3,075	3,575	179,312	2,023,616
2008	695,462	574,555	15,566	9	105,340	516,192	509,337	3,223	3,632	179,270	2,202,886
2009	698,208	570,392	19,930	9	107,886	564,295	557,166	3,439	3,690	133,912	2,336,798
2010	677,111	544,773	22,090	2,042	108,206	584,866	577,393	3,543	3,930	92,245	2,429,043

SOURCE: Department of the Treasury.

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

... = not applicable.

- The definitions of the categories "net payroll tax contributions" and "reimbursements from the general fund of the Treasury" differ slightly from those used in previous editions of this table. Data in these two columns for 1984 and later may vary from those in prior editions, but total receipts are unchanged.
- 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 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; (3) in 1968 and later, for costs of benefits to certain uninsured persons who attained age 72 before 1968; (4) in 1984 for employees, and in 1984–1989 for self-employed persons, for payroll tax credits provided under Public Law 98-21; and (5) in 2010, for payroll tax revenue forgone under the provisions of Public Law 111-147.
- Includes net profits or losses on marketable securities; interest adjustments on amounts reimbursed from, or paid to, other trust funds or the general fund of the Treasury; and relatively small amounts of gifts to the fund.
- 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.
- The fund borrowed from the Disability Insurance and Hospital Insurance Trust Funds in 1982, and repaid the borrowed amounts in 1985 and 1986. Amounts for these years are equal to total receipts less total expenditures, plus amounts borrowed or less amounts repaid.
- Between -\$500,000 and \$500,000.

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Table 4.A2—Disability Insurance, 1957–2010 (in millions of dollars)

Year	Receipts ^a					Expenditures				Assets	
	Total	Net payroll tax contributions ^b	Income from taxation of benefits	Reimbursements from the general fund of the Treasury ^c	Net interest ^d	Total	Benefit payments ^e	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	-1	-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	15,503	190	441	1,174	18,546	17,898	626	22	-1,237	3,959
1985	19,301	17,014	222	1,195	870	19,478	18,827	608	43	^f 2,363	6,321
1986	19,439	18,247	238	152	803	20,522	19,853	600	68	^f 1,459	7,780
1987	20,303	19,538	-36	153	648	21,425	20,519	849	57	-1,122	6,658
1988	22,699	21,837	61	202	600	22,494	21,695	737	61	206	6,864
1989	24,795	23,797	95	196	707	23,753	22,911	754	88	1,041	7,905
1990	28,791	28,403	144	-639	883	25,616	24,829	707	80	3,174	11,079
1991	30,390	29,128	190	9	1,063	28,571	27,695	794	82	1,819	12,898
1992	31,430	30,148	232	-12	1,062	32,004	31,112	834	58	-574	12,324
1993	32,301	31,182	281	4	835	35,662	34,613	966	83	-3,361	8,963
1994	52,841	51,372	311	1	1,157	38,879	37,744	1,029	106	13,962	22,925

(Continued)

4.A OASDI: Trust Funds

Table 4.A2—Disability Insurance, 1957–2010 (in millions of dollars)—Continued

Year	Receipts ^a					Expenditures				Assets	
	Total	Net payroll tax contributions ^b	Income from taxation of benefits	Reimbursements from the general fund of the Treasury ^c	Net interest ^d	Total	Benefit payments ^e	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of year
1995	56,696	54,404	341	-207	2,158	42,055	40,923	1,064	68	14,641	37,566
1996	60,710	57,325	373	9	3,012	45,351	44,189	1,160	2	15,359	52,924
1997	60,499	56,037	470	9	3,992	47,034	45,695	1,280	59	13,465	66,389
1998	64,357	58,966	558	9	4,832	49,931	48,207	1,567	157	14,425	80,815
1999	69,541	63,203	661	9	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	9	8,158	61,369	59,618	1,741	10	22,534	140,993
2002	87,379	77,272	930	9	9,178	67,905	65,702	2,049	154	19,475	160,468
2003	88,074	77,442	944	9	9,689	73,108	70,933	2,008	167	14,966	175,434
2004	91,380	80,281	1,111	9	9,988	80,597	78,229	2,152	215	10,783	186,217
2005	97,423	86,077	1,073	9	10,273	88,018	85,365	2,315	338	9,405	195,623
2006	102,641	90,808	1,230	9	10,603	94,456	91,741	2,326	388	8,185	203,808
2007	109,854	95,243	1,393	8	13,210	98,778	95,865	2,468	445	11,076	214,884
2008	109,840	97,566	1,313	9	10,961	108,951	106,007	2,526	418	889	215,773
2009	109,283	96,865	1,955	9	10,463	121,506	118,315	2,743	448	-12,223	203,550
2010	104,017	92,511	1,852	363	9,292	127,660	124,216	2,982	462	-23,643	179,907

SOURCE: Department of the Treasury.

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

... = not applicable.

- The definitions of the categories "net payroll tax contributions" and "reimbursements from the general fund of the Treasury" differ slightly from those used in previous editions of this table. Data in these two columns for 1984 and later may vary from those in prior editions, but total receipts are unchanged.
- 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; (2) in 1971–1982, for costs of deemed wage credits for military service performed after 1956; (3) in 1968 and later, for costs of benefits to certain uninsured persons who attained age 72 before 1968; (4) in 1984 for employees, and in 1984–1989 for self-employed persons, for payroll tax credits provided under Public Law 98-21; and (5) in 2010, for payroll tax revenue forgone under the provisions of Public Law 111-147.
- Includes net profits or losses on marketable securities; interest adjustments on amounts reimbursed from, or paid to, other trust funds or the general fund of the Treasury; and relatively small amounts of gifts to the fund.
- 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.
- The Old-Age and Survivors Insurance Trust Fund borrowed from the Disability Insurance and Hospital Insurance Trust Funds in 1982, and repaid the borrowed amounts in 1985 and 1986. Amounts for these years are equal to total receipts less total expenditures, plus amounts borrowed or less amounts repaid.
- Between -\$500,000 and \$500,000.

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Table 4.A3—Combined OASI and DI, 1957–2010 (in millions of dollars)

Year	Receipts ^a					Expenditures				Assets	
	Total	Net payroll tax contributions ^b	Income from taxation of benefits	Reimbursements from the general fund of the Treasury ^c	Net interest ^d	Total	Benefit payments ^e	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	^f 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	175,019	3,025	5,153	3,440	180,429	175,739	2,264	2,426	6,208	31,075
1985	203,540	192,142	3,430	5,227	2,741	190,628	186,075	2,200	2,353	^f 11,088	42,163
1986	216,833	207,384	3,662	1,916	3,871	201,522	196,667	2,202	2,653	^f 4,698	46,861
1987	231,039	220,630	3,221	1,850	5,338	209,093	204,106	2,373	2,614	21,946	68,807
1988	263,469	249,520	3,445	2,336	8,168	222,514	217,149	2,513	2,851	40,955	109,762
1989	289,448	271,925	2,534	2,297	12,692	236,242	230,882	2,427	2,934	53,206	162,968
1990	315,443	294,513	4,992	-1,307	17,245	253,135	247,816	2,270	3,049	62,309	225,277
1991	329,676	301,605	6,054	125	21,892	274,205	268,162	2,587	3,457	55,471	280,747
1992	342,591	311,280	6,084	-138	25,365	291,865	285,995	2,664	3,206	50,726	331,473
1993	355,578	322,046	5,616	54	27,862	308,766	302,368	2,963	3,435	46,812	378,285
1994	381,111	344,689	5,306	14	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, 1957–2010 (in millions of dollars)—Continued

Year	Receipts ^a					Expenditures				Assets	
	Total	Net payroll tax contributions ^b	Income from taxation of benefits	Reimbursements from the general fund of the Treasury ^c	Net interest ^d	Total	Benefit payments ^e	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of year
1995	399,497	359,063	5,831	-375	34,977	339,815	332,554	3,141	4,120	59,683	496,068
1996	424,451	378,880	6,844	9	38,718	353,569	347,050	2,962	3,556	70,883	566,950
1997	457,668	405,982	7,896	3	43,787	369,108	361,952	3,409	3,747	88,560	655,510
1998	489,204	430,172	9,707	2	49,323	382,255	374,969	3,467	3,819	106,950	762,460
1999	526,582	459,555	11,559	1	55,466	392,908	385,765	3,328	3,816	133,673	896,133
2000	568,433	492,484	12,314	-835	64,471	415,121	407,635	3,788	3,698	153,312	1,049,445
2001	602,003	516,392	12,715	2	72,895	438,916	431,931	3,702	3,283	163,088	1,212,533
2002	627,085	532,470	13,839	415	80,362	461,653	453,821	4,185	3,647	165,432	1,377,965
2003	631,886	533,518	13,441	1	84,926	479,086	470,778	4,562	3,747	152,799	1,530,764
2004	657,718	553,039	15,703	1	^g 88,975	^g 501,643	493,263	4,536	3,844	156,075	1,686,839
2005	701,758	592,940	14,916	-350	94,252	529,938	520,748	5,272	3,917	171,821	1,858,660
2006	744,873	625,594	16,858	^h	102,420	555,421	546,238	5,337	3,846	189,452	2,048,112
2007	784,889	656,120	18,585	8	110,176	594,501	584,939	5,542	4,020	190,388	2,238,500
2008	805,302	672,122	16,879	^h	116,301	625,143	615,344	5,749	4,050	180,159	2,418,658
2009	807,490	667,257	21,884	^h	118,349	685,801	675,482	6,182	4,137	121,689	2,540,348
2010	781,128	637,283	23,942	2,405	117,498	712,526	701,609	6,525	4,392	68,602	2,608,950

SOURCE: Department of the Treasury.

NOTES: The DI fund was established in 1957. For trust fund data prior to 1957, see OASI data (Table 4.A1).

Totals do not necessarily equal the sum of rounded components.

... = not applicable.

- The definitions of the categories "net payroll tax contributions" and "reimbursements from the general fund of the Treasury" differ slightly from those used in previous editions of this table. Data in these two columns for 1984 and later may vary from those in prior editions, but total receipts are unchanged.
- 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; (2) in 1971–1982, for costs of deemed wage credits for military service performed after 1956; (3) in 1968 and later, for costs of benefits to certain uninsured persons who attained age 72 before 1968; (4) in 1984 for employees, and in 1984–1989 for self-employed persons, for payroll tax credits provided under Public Law 98-21; and (5) in 2010, for payroll tax revenue forgone under the provisions of Public Law 111-147.
- Includes net profits or losses on marketable securities; interest adjustments on amounts reimbursed from, or paid to, other trust funds or the general fund of the Treasury; and relatively small amounts of gifts to the fund.
- 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.
- The OASI fund borrowed from the DI and Hospital Insurance Trust Funds in 1982, and repaid the borrowed amounts in 1985 and 1986. Amounts for these years are equal to total receipts less total expenditures, plus amounts borrowed or less amounts repaid.
- Revised data.
- Between -\$500,000 and \$500,000.

CONTACT: Michael Stephens (410) 965-3028 or statistics@ssa.gov.

Table 4.A4—Total annual benefits paid, by type of benefit and trust fund, and as a percentage of personal income, selected years 1937–2010 (in millions of dollars)

Year	Total benefits	Cash benefits ^a		Service benefits		Rehabilitation services ^b		Personal income ^c	Total benefits as a percentage of personal income
		Old-Age and Survivors Insurance ^d	Disability Insurance	Hospital Insurance	Supplementary Medical Insurance ^e	Old-Age and Survivors Insurance	Disability Insurance		
1937	1	1	...	...	...	...	...	74,100	f
1938	10	10	...	...	...	...	...	68,400	f
1939	14	14	...	...	...	...	...	72,900	f
1940	35	35	...	...	...	...	...	78,400	f
1945	274	274	...	...	...	...	...	171,600	0.2
1950	961	961	...	...	...	...	...	228,900	0.4
1955	4,968	4,968	...	...	...	...	...	316,000	1.6
1960	11,245	10,677	568	...	...	...	...	411,300	2.7
1961	12,749	11,862	887	...	...	...	...	428,800	3.0
1962	14,461	13,356	1,105	...	...	...	...	456,400	3.2
1963	15,427	14,217	1,210	...	...	...	...	479,500	3.2
1964	16,223	14,914	1,309	...	...	...	...	514,300	3.2
1965	18,311	16,737	1,573	...	...	...	...	555,500	3.3
1966	21,070	18,267	1,781	891	128	⁹	3	603,800	3.5
1967	25,967	19,468	1,939	3,353	1,197	⁹	11	648,100	4.0
1968	30,651	22,642	2,294	4,179	1,518	1	16	711,700	4.3
1969	33,371	24,209	2,542	4,739	1,865	1	15	778,300	4.3
1970	38,982	28,796	3,067	5,124	1,975	2	18	838,600	4.6
1971	45,065	33,413	3,758	5,751	2,117	2	24	903,100	5.0
1972	50,269	37,122	4,473	6,318	2,325	2	29	992,600	5.1
1973	61,091	45,741	5,718	7,057	2,526	3	46	1,110,500	5.5
1974	70,996	51,618	6,903	9,099	3,318	5	54	1,222,700	5.8
1975	82,611	58,509	8,414	11,315	4,273	9	91	1,334,900	6.2
1976	94,180	65,699	9,966	13,340	5,080	6	89	1,474,700	6.4
1977	106,443	73,113	11,463	15,737	6,038	8	84	1,632,500	6.5
1978	117,894	80,352	12,513	17,682	7,252	9	86	1,836,700	6.4
1979	133,691	90,556	13,708	20,623	8,708	18	78	2,059,500	6.5
1980	156,298	105,074	15,437	25,064	10,635	8	78	2,301,500	6.8
1981	184,450	123,795	17,199	30,342	13,113	8	-8	2,582,300	7.1
1982	207,268	138,800	17,338	35,631	15,455	6	38	2,766,800	7.5
1983	224,524	149,502	17,530	39,337	18,106	6	42	2,952,200	7.6
1984	238,682	157,862	17,900	43,257	19,661	⁹	1	3,268,900	7.3
1985	256,723	167,360	18,836	47,580	22,947	⁹	⁹	3,496,700	7.3
1986	272,698	176,845	19,847	49,758	26,239	...	9	3,696,000	7.4
1987	284,487	183,644	20,512	49,496	30,820	...	16	3,924,400	7.2
1988	303,717	195,522	21,692	52,517	33,970	...	16	4,231,200	7.2
1989	329,193	207,977	22,873	60,011	38,294	...	38	4,557,500	7.2
1990	356,536	222,993	24,803	66,239	42,468	...	32	4,846,700	7.4
1991	386,912	240,436	27,662	71,549	47,229	...	36	5,031,500	7.7
1992	419,325	254,939	31,091	83,895	49,367	...	33	5,347,300	7.8
1993	449,896	267,804	34,598	93,487	53,979	...	28	5,568,100	8.1
1994	478,775	279,118	37,717	103,282	58,618	...	40	5,874,800	8.1

(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 1937–2010 (in millions of dollars)—Continued

Year	Total benefits	Cash benefits ^a		Service benefits		Rehabilitation services ^b		Personal income ^c	Total benefits as a percentage of personal income
		Old-Age and Survivors Insurance ^d	Disability Insurance	Hospital Insurance	Supplementary Medical Insurance ^e	Old-Age and Survivors Insurance	Disability Insurance		
1995	513,959	291,682	40,898	116,368	64,972	...	39	6,200,900	8.3
1996	544,350	302,914	44,174	128,632	68,598	...	31	6,591,600	8.3
1997	572,542	316,311	45,659	137,762	72,757	...	53	7,000,700	8.2
1998	585,156	326,817	48,173	133,990	76,125	...	51	7,525,400	7.8
1999	595,326	334,437	51,331	128,766	80,724	...	68	7,910,800	7.5
2000	625,060	352,706	54,938	128,458	88,893	...	63	8,559,400	7.3
2001	672,853	372,370	59,577	141,183	99,663	...	60	8,883,300	7.6
2002	714,804	388,170	65,645	149,944	110,969	...	75	9,060,100	7.9
2003	746,756	399,892	70,906	152,084	123,825	3	47	9,378,100	8.0
2004	795,868	415,082	78,202	167,554	134,978	3	49	9,937,200	8.0
2005	850,058	435,373	85,394	180,013	149,228	58	-9	10,485,900	8.1
2006	954,837	460,457	92,384	188,989	212,941	4	61	11,268,100	8.5
2007	1,010,397	485,881	99,086	200,151	225,217	2	61	11,894,100	8.5
2008	1,077,021	509,056	106,301	232,299	229,287	4	75	12,238,800	8.8
2009	1,177,869	557,160	118,329	239,260	263,038	3	79	12,030,300	9.8
2010	1,213,209	577,448	124,191	244,463	267,051	2	54	12,546,700	9.7

SOURCES: Department of the Treasury, Centers for Medicare & Medicaid Services, and Bureau of Economic Analysis.

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

... = not applicable.

- a. The amounts of benefits paid generally do not reflect occasional adjustments such as reimbursements for uncashed checks, reimbursements to correct earlier accounting errors, and interfund transfers to correct earlier allocation errors.
- 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 are subject to revision.
- d. For 1937–1939, refunds and lump-sum death payments under the Social Security Act of 1935.
- e. Beginning with 2006, SMI amounts include both Part B and estimated Part D payments.
- f. Less than 0.05 percent.
- g. Between -\$500,000 and \$500,000.

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**Table 4.A5—Total annual benefits paid from OASI trust fund, by type of benefit, selected years 1937–2010
(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 ^a	Parents		
1937	1	...	...	...	...	...	...	...	...	1
1938	10	...	...	...	...	...	...	...	...	10
1939	14	...	...	...	...	...	...	...	...	14
1940	35	15	2	b	3	2	b	b	...	9
1945	274	126	21	2	52	27	20	1	...	26
1950	961	557	88	6	135	49	89	3	...	33
1955	4,968	3,253	466	29	532	163	396	16	...	113
1956	5,715	3,793	536	33	581	177	469	17	...	109
1957	7,347	4,888	756	43	651	198	653	19	...	139
1958	8,327	5,567	851	56	720	223	757	20	...	133
1959	9,842	6,548	982	77	855	263	921	25	...	171
1960	10,677	7,053	1,051	92	945	286	1,057	28	...	164
1961	11,862	7,802	1,124	106	1,080	316	1,232	31	...	171
1962	13,356	8,813	1,216	134	1,171	336	1,470	34	...	183
1963	14,217	9,391	1,258	146	1,222	348	1,612	34	...	206
1964	14,914	9,854	1,277	150	1,275	354	1,754	33	...	216
1965	16,737	10,984	1,383	175	1,515	388	2,041	35	...	217
1966	18,267	11,727	1,429	216	1,812	415	2,351	35	44	237
1967	19,468	12,372	1,456	221	1,855	420	2,545	34	313	252
1968	22,642	14,278	1,673	253	2,207	478	3,117	37	330	269
1969	24,209	15,385	1,750	260	2,322	490	3,371	36	303	291
1970	28,796	18,438	2,029	303	2,760	574	4,055	39	305	294
1971	33,413	21,544	2,323	352	3,168	630	4,763	41	285	306
1972	37,122	24,143	2,532	382	3,433	679	5,326	43	263	320
1973	45,741	29,336	3,000	457	4,002	801	7,505	48	264	329
1974	51,618	33,369	3,309	533	4,399	898	8,497	49	237	327
1975	58,509	38,079	3,719	634	4,888	1,009	9,597	50	196	337
1976	65,699	43,083	4,117	736	5,336	1,113	10,757	51	174	332
1977	73,113	48,186	4,559	830	5,759	1,191	12,068	52	157	312
1978	80,352	53,255	4,983	921	6,093	1,284	13,278	51	142	344
1979	90,556	60,379	5,554	1,014	6,608	1,409	15,071	52	128	340
1980	105,074	70,358	6,405	1,142	7,389	1,572	17,638	55	119	394
1981	123,795	83,614	7,543	1,321	8,307	1,760	20,749	58	110	332
1982	138,800	95,123	8,539	1,223	8,204	1,861	23,488	59	100	203
1983	149,502	103,578	9,328	1,143	7,911	1,771	25,425	56	85	205
1984	157,862	109,957	9,860	1,135	7,775	1,474	27,325	53	71	212
1985	167,360	116,823	10,517	1,140	7,762	1,474	29,330	51	57	207
1986	176,845	123,584	11,152	1,166	7,843	1,457	31,345	48	47	203
1987	183,644	128,513	11,598	1,183	7,846	1,388	32,833	44	36	203
1988	195,522	136,987	12,292	1,219	8,120	1,392	35,233	43	29	208
1989	207,977	146,027	13,054	1,249	8,254	1,401	37,723	41	21	206
1990	222,993	156,756	13,953	1,316	8,564	1,437	40,705	39	16	206
1991	240,436	169,142	14,986	1,405	9,022	1,490	44,139	38	12	202
1992	254,939	179,372	15,810	1,494	9,431	1,521	47,060	37	9	206
1993	267,804	188,440	16,356	1,563	9,897	1,547	49,746	36	6	214
1994	279,118	196,400	16,854	1,637	10,293	1,551	52,124	34	4	220

(Continued)

4.A OASDI: Trust Funds

Table 4.A5—Total annual benefits paid from OASI trust fund, by type of benefit, selected years 1937–2010 (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 ^a	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	^b	218
1999	334,437	238,478	18,415	1,992	12,125	1,415	61,769	27	^b	216
2000	352,706	253,542	18,969	2,133	12,532	1,406	63,884	26	^b	214
2001	372,370	268,976	19,491	2,332	13,134	1,441	66,758	26	^b	212
2002	388,170	281,624	19,884	2,475	13,690	1,476	68,782	25	^b	213
2003	399,892	291,518	19,951	2,583	14,072	1,486	70,052	24	^b	206
2004	415,082	304,261	20,164	2,714	14,538	1,515	71,660	24	^b	205
2005	435,373	321,706	20,500	2,888	15,103	1,535	73,411	24	^b	206
2006	460,457	342,865	21,005	3,082	15,814	1,562	75,900	24	^b	204
2007	485,881	364,278	21,571	3,274	16,486	1,573	78,472	24	^b	203
2008	509,056	383,999	22,022	3,482	17,041	1,592	80,692	23	^b	205
2009	557,160	424,044	23,613	3,922	18,071	1,647	85,639	23	^b	201
2010	577,448	443,390	24,001	4,114	18,024	1,645	86,048	23	^b	203

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

NOTES: Amounts by type of benefit are estimated. The amounts of benefits paid generally do not reflect occasional adjustments such as reimbursements for uncashed checks, reimbursements to correct earlier accounting errors, and interfund transfers to correct earlier allocation errors.

Totals do not necessarily equal the sum of rounded components.

. . . = not applicable.

- a. Aged widow(er)s and disabled widow(er)s.
- b. Less than \$500,000.

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Table 4.A6—Total annual benefits paid from DI trust fund, by type of benefit, 1957–2010 (in millions of dollars)

Year	Total	Disabled workers	Wives and husbands	Children
1957	57	57	...	...
1958	249	246	1	1
1959	457	390	29	38
1960	568	489	32	48
1961	887	724	54	109
1962	1,105	888	68	149
1963	1,210	965	73	172
1964	1,309	1,044	79	186
1965	1,573	1,246	95	232
1966	1,781	1,394	108	280
1967	1,939	1,519	113	307
1968	2,294	1,804	131	360
1969	2,542	2,014	139	389
1970	3,067	2,448	165	454
1971	3,758	3,028	192	539
1972	4,473	3,626	224	623
1973	5,718	4,676	281	760
1974	6,903	5,662	320	920
1975	8,414	6,908	385	1,121
1976	9,966	8,190	447	1,328
1977	11,463	9,456	505	1,503
1978	12,513	10,315	541	1,657
1979	13,708	11,333	581	1,794
1980	15,437	12,816	638	1,983
1981	17,199	14,379	684	2,136
1982	17,338	14,811	652	1,875
1983	17,530	15,196	607	1,728
1984	17,900	15,623	536	1,741
1985	18,836	16,483	545	1,809
1986	19,847	17,409	547	1,890
1987	20,512	18,053	532	1,926
1988	21,692	19,165	529	1,999
1989	22,873	20,314	523	2,036
1990	24,803	22,113	531	2,159
1991	27,662	24,738	550	2,374
1992	31,091	27,856	572	2,663
1993	34,598	30,913	572	3,112
1994	37,717	33,711	579	3,428
1995	40,898	36,610	577	3,711
1996	44,174	39,625	515	4,034
1997	45,659	41,083	479	4,098
1998	48,173	43,467	457	4,249
1999	51,331	46,459	433	4,439
2000	54,938	49,848	421	4,670
2001	59,577	54,244	416	4,917
2002	65,645	59,886	423	5,337
2003	70,906	64,811	431	5,664
2004	78,202	71,685	455	6,062
2005	85,394	78,381	483	6,531
2006	92,384	84,952	509	6,923
2007	99,086	91,314	520	7,251
2008	106,301	98,104	534	7,664
2009	118,329	109,549	586	8,194
2010	124,191	115,059	598	8,534

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

NOTES: Amounts by type of benefit are estimated. The amounts of benefits paid generally do not reflect occasional adjustments such as reimbursements for uncashed checks, reimbursements to correct earlier accounting errors, and interfund transfers to correct earlier allocation errors.

Totals do not necessarily equal the sum of rounded components.

... = not applicable.

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4.B OASDI: Covered Workers

Table 4.B1—Number of workers with taxable earnings, amount of earnings, and Social Security numbers issued, selected years 1937–2010

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 1937–2010—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	154,732	9,556	5,014	4,819,870	4,008,500	83.2	31,150	25,906	5,476
2001	155,416	9,213	4,425	4,919,536	4,167,900	84.7	31,654	26,818	5,883
2002	154,893	8,416	4,279	4,938,294	4,250,100	86.1	31,882	27,439	5,699
2003	154,576	8,494	4,190	5,068,917	4,355,000	85.9	32,792	28,174	5,372
2004	156,405	9,225	4,641	5,370,545	4,554,500	84.8	34,337	29,120	6,065
2005	158,511	9,652	4,983	5,668,730	4,766,000	84.1	35,762	30,067	5,280
2006	161,052	9,741	5,162	6,049,719	5,043,400	83.4	37,564	31,315	5,662
2007 ^e	162,905	10,009	4,985	6,389,941	5,266,100	82.4	39,225	32,326	5,906
2008 ^e	162,387	9,738	4,327	6,507,222	5,433,200	83.5	40,072	33,458	5,785
2009 ^f	157,606	8,550	3,489	6,181,755	5,268,272	85.2	39,223	33,427	5,548
2010 ^g	156,725	--	--	6,333,227	5,332,760	84.2	40,410	34,026	5,442

SOURCES: Social Security Administration, Master Earnings File, 1 percent sample; Bureau of Economic Analysis; Bureau of Labor Statistics.

NOTE: -- = not available.

- Relates to wage and salary workers from 1937 to 1950. Beginning in 1951, includes self-employment. Reported taxable earnings include Social Security taxable wages as reported by employers and Social Security taxable self-employment income as reported by self-employed individuals. See Table 2.A3 for annual maximum taxable earnings.
- Excludes railroad account numbers. Since program began, 459.1 million Social Security numbers have been issued. Some individuals have been issued more than one number.
- Workers reported with first taxable earnings under program in specified year. From 1937 to 2009, 345.6 million different persons reported with taxable earnings.
- Total wages, including estimated amounts above taxable limit, from 1937 to 1950. Beginning in 1951, also includes reported total net earnings of self-employed persons.
- Preliminary data.
- Taxable earnings are preliminary estimates based on Social Security data; employment data are preliminary estimates based on data from Bureau of Labor Statistics.
- Preliminary estimates based on data from Bureau of Labor Statistics and the Bureau of Economic Analysis.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

4.B OASDI: Covered Workers

Table 4.B2—Number with taxable earnings and amount of earnings, by type of earnings, 1951–2010

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, 1951–2010—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	146,097	14,675	4,494,170	3,798,400	84.5	30,762	25,999	325,700	210,100	64.5	22,194	14,317
2001	146,596	14,930	4,586,990	3,950,100	86.1	31,290	26,945	332,546	217,800	65.5	22,274	14,588
2002	145,793	15,249	4,596,694	4,021,800	87.5	31,529	27,586	341,600	228,300	66.8	22,401	14,971
2003	145,101	15,969	4,708,439	4,114,000	87.4	32,449	28,353	360,478	241,000	66.9	22,574	15,092
2004	146,662	16,496	4,973,650	4,295,900	86.4	33,912	29,291	396,895	258,600	65.2	24,060	15,677
2005	148,530	17,098	5,231,330	4,490,500	85.8	35,221	30,233	437,400	275,500	63.0	25,582	16,113
2006	150,787	17,724	5,585,095	4,751,700	85.1	37,040	31,513	464,624	291,700	62.8	26,214	16,458
2007 ^e	152,471	18,188	5,910,948	4,969,600	84.1	38,768	32,594	478,993	296,500	61.9	26,336	16,302
2008 ^e	152,121	17,870	6,032,502	5,140,600	85.2	39,656	33,793	474,720	292,600	61.6	26,565	16,374
2009 ^f	147,599	16,882	5,745,806	4,990,900	86.9	38,928	33,814	435,949	277,372	63.6	25,823	16,430
2010 ^g	146,838	16,154	5,879,569	5,049,539	85.9	40,041	34,389	453,658	283,221	62.4	28,083	17,533

SOURCES: Social Security Administration, Master Earnings File, 1 percent sample; Bureau of Economic Analysis; Bureau of Labor Statistics.

NOTE: See Table 4.B1 for wage and salary data before 1951.

- a. Represents total number in specified type of employment. Persons with both types of covered employment during the year are included in each type.
- b. Total wages, including estimated amounts above the taxable limit.
- c. Reported self-employment net earnings.
- d. Includes Social Security taxable wages as reported by employers and Social Security taxable self-employment income as reported by self-employed individuals. 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: (410) 965-0090 or statistics@ssa.gov.

4.B OASDI: Covered Workers

Table 4.B3—Number of workers and median annual earnings, by type of earnings and sex, selected years 1937–2009

Year	All workers ^a			Wage and salary			Self-employed ^b		
	Total	Men	Women	Subtotal	Men	Women	Subtotal	Men	Women
	<i>Number (thousands)^c</i>								
1937	32,900	23,810	9,090	32,900	23,810	9,090	...	...	...
1940	35,390	25,570	9,820	35,390	25,570	9,820	...	...	...
1945	46,390	28,820	17,570	46,390	28,820	17,570	...	...	...
1950	48,280	32,620	15,660	48,280	32,620	15,660	...	...	...
1955	65,200	43,140	22,060	59,560	38,240	21,320	6,810	5,980	830
1960	72,530	47,900	24,630	66,980	43,100	23,880	6,870	5,990	880
1965	80,680	51,990	28,690	75,430	47,500	27,930	6,550	5,640	910
1970	93,090	57,330	35,760	88,180	53,180	35,000	6,270	5,370	900
1975	100,200	59,520	40,680	94,900	55,140	39,760	7,000	5,790	1,210
1980	113,000	64,288	48,712	107,200	59,751	47,449	8,200	6,407	1,793
1985	119,800	66,113	53,687	113,100	61,285	51,815	10,600	7,623	2,977
1986	122,900	67,412	55,488	115,900	62,398	53,502	11,200	7,932	3,268
1987	125,600	68,591	57,009	118,200	63,306	54,894	12,000	8,450	3,550
1988	129,600	70,596	59,004	122,100	65,270	56,830	12,400	8,630	3,770
1989	131,700	71,517	60,183	123,900	66,105	57,795	12,900	8,842	4,058
1990	133,600	72,291	61,309	126,100	67,064	59,036	12,500	8,526	3,974
1991	133,000	71,787	61,213	125,200	66,406	58,794	12,800	8,669	4,131
1992	134,000	72,016	61,984	126,000	66,543	59,457	13,100	8,797	4,303
1993	136,100	73,154	62,946	128,100	67,673	60,427	13,200	8,840	4,360
1994	138,200	73,989	64,211	130,100	68,481	61,619	13,300	8,840	4,460
1995	141,000	75,444	65,556	132,800	69,900	62,900	13,500	8,908	4,592
1996	143,400	76,241	67,158	135,100	70,670	64,429	13,900	9,074	4,826
1997	146,145	77,498	68,647	137,765	71,910	65,855	14,020	9,078	4,942
1998	148,786	78,671	70,115	140,386	73,111	67,275	14,230	9,108	5,122
1999	151,333	80,042	71,291	142,703	74,376	68,327	14,500	9,224	5,276
2000	154,732	81,654	73,078	146,097	76,033	70,064	14,675	9,277	5,398
2001	155,416	82,006	73,410	146,596	76,303	70,293	14,930	9,354	5,576
2002	154,893	81,568	73,325	145,793	75,711	70,082	15,249	9,442	5,807
2003	154,576	81,263	73,313	145,101	75,200	69,901	15,969	9,860	6,109
2004	156,405	82,103	74,302	146,662	75,910	70,752	16,496	10,088	6,408
2005	158,511	83,073	75,438	148,530	76,758	71,772	17,098	10,395	6,703
2006	161,052	84,284	76,768	150,787	77,820	72,967	17,724	10,705	7,019
2007 ^d	162,905	85,105	77,800	152,471	78,605	73,866	18,189	10,866	7,323
2008 ^d	162,387	84,639	77,748	152,121	78,377	73,744	17,870	10,464	7,406
2009 ^d	157,606	81,574	76,032	147,599	75,615	71,984	16,883	9,688	7,194

(Continued)

Table 4.B3—Number of workers and median annual earnings, by type of earnings and sex, selected years 1937–2009—Continued

Year	All workers ^a			Wage and salary			Self-employed ^b		
	Total	Men	Women	Subtotal	Men	Women	Subtotal	Men	Women
	<i>Median earnings ^e (dollars)</i>								
1937	761	945	484	761	945	484	...	...	...
1940	746	935	472	746	935	472	...	...	...
1945	1,159	1,654	770	1,159	1,654	770	...	...	...
1950	1,926	2,532	1,124	1,926	2,532	1,124	...	...	...
1955	2,438	3,315	1,351	2,383	3,348	1,338	2,397	2,550	1,552
1960	2,894	3,879	1,679	2,833	3,875	1,676	2,903	3,129	1,695
1965	3,414	4,685	1,984	3,319	4,630	1,979	3,858	4,242	1,898
1970	4,375	6,180	2,735	4,317	6,173	2,770	5,104	5,683	2,360
1975	5,803	8,250	3,730	5,790	8,315	3,794	6,700	7,846	3,113
1980	8,549	11,963	6,012	8,612	12,166	6,106	8,699	10,572	4,133
1985	11,265	14,959	8,293	11,638	15,706	8,525	9,877	12,301	5,529
1986	11,831	15,579	8,796	12,064	16,025	9,019	10,424	12,908	6,152
1987	12,327	16,073	9,261	12,576	16,559	9,500	10,886	13,401	6,573
1988	12,825	16,613	9,753	13,086	17,055	9,992	11,478	14,090	7,036
1989	13,314	17,014	10,265	13,762	17,800	10,577	11,602	14,538	7,010
1990	13,898	17,582	10,837	14,432	18,483	11,199	11,220	14,097	6,898
1991	14,278	17,765	11,369	14,859	18,730	11,767	11,125	13,703	7,186
1992	14,739	18,208	11,842	15,386	19,292	12,268	11,392	13,966	7,452
1993	15,000	18,430	12,093	15,665	19,516	12,546	11,595	14,128	7,720
1994	15,560	19,249	12,422	16,010	19,969	12,807	12,051	14,737	8,002
1995	16,108	19,907	12,897	16,618	20,672	13,296	12,198	14,931	8,301
1996	16,712	20,779	13,335	17,256	21,591	13,763	12,481	15,300	8,628
1997	17,562	21,814	14,043	18,127	22,693	14,482	12,910	15,911	8,944
1998	18,513	23,028	14,834	19,103	23,920	15,290	13,462	16,565	9,365
1999	19,265	23,927	15,465	19,885	24,839	15,938	14,051	17,338	9,784
2000	20,225	25,032	16,287	20,885	25,999	16,801	14,927	18,538	10,270
2001	20,905	25,643	17,037	21,629	26,647	17,595	15,010	18,681	10,470
2002	21,193	25,765	17,461	21,987	26,892	18,085	14,429	17,761	10,514
2003	21,610	26,173	17,845	22,473	27,364	18,497	14,512	17,998	10,678
2004	22,335	27,061	18,421	23,242	28,305	19,138	14,912	18,430	11,100
2005	22,985	27,886	18,886	23,905	29,154	19,633	15,543	19,289	11,559
2006	23,857	28,918	19,598	24,843	30,262	20,396	15,889	19,769	11,911
2007 ^d	24,603	29,752	20,367	25,690	31,195	21,219	15,717	19,520	12,080
2008 ^d	25,223	30,282	21,058	26,383	31,814	22,024	15,245	19,102	12,168
2009 ^d	24,853	29,406	21,172	26,120	30,984	22,261	14,040	17,428	11,786

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

NOTE: ... = not applicable.

- Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment but only once in the total.
- Not covered before 1951.
- Totals do not necessarily equal the sum of rounded components.
- Preliminary data.
- For all workers, medians relate to combined earnings from wage and salary employment and self-employment. For all wage and salary workers, medians relate to wages and salaries only.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

4.B OASDI: Covered Workers

Table 4.B4—Percentage of workers with earnings below annual maximum taxable, by sex, selected years 1937–2009

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 1937–2009—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	93.8	90.6	97.4	92.5	90.1	96.6	76,200
2001	94.1	91.0	97.5	93.0	90.8	96.8	80,400
2002	94.6	91.8	97.7	94.9	93.2	97.7	84,900
2003	94.5	91.8	97.5	95.0	93.4	97.6	87,000
2004	94.1	91.2	97.3	94.8	93.1	97.5	87,900
2005	93.9	91.0	97.1	94.7	93.0	97.4	90,000
2006	94.0	91.1	97.1	95.0	93.2	97.7	94,200
2007 ^b	93.9	91.0	97.0	95.3	93.5	97.8	97,500
2008 ^b	94.0	91.2	97.0	95.6	93.8	98.0	102,000
2009 ^b	94.6	92.1	97.3	96.1	94.4	98.3	106,800

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

NOTE: . . . = not applicable.

a. From 1937 to 1950, relates to wage and salary workers. Beginning in 1951, includes self-employed workers.

b. Preliminary data.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

4.B OASDI: Covered Workers

Table 4.B5—Number of workers, by sex and age, selected years 1937–2009 (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	154,732	12,413	16,703	16,438	17,715	19,245	19,199	16,990	14,156	9,681	2,876	3,243	3,159	829	2,083
2001	155,416	11,753	16,981	16,081	17,688	18,783	19,336	17,449	14,571	10,288	2,989	3,331	3,230	828	2,107
2002	154,893	11,045	17,015	15,952	17,346	18,108	19,213	17,698	14,625	10,936	3,266	3,425	3,301	813	2,150
2003	154,576	10,483	17,018	15,904	16,940	17,527	19,069	17,879	14,831	11,387	3,506	3,554	3,425	825	2,226
2004	156,405	10,558	17,201	16,216	16,613	17,283	18,974	18,153	15,333	11,987	3,490	3,883	3,584	851	2,280
2005	158,511	10,850	17,359	16,654	16,179	17,312	18,694	18,414	15,845	12,591	3,416	4,181	3,754	904	2,357
2006	161,052	11,130	17,545	17,138	15,923	17,395	18,339	18,623	16,376	13,038	3,798	4,373	3,962	958	2,453
2007 ^b	162,905	11,103	17,638	17,481	16,016	17,283	17,928	18,702	16,785	13,278	4,461	4,418	4,277	967	2,569
2008 ^b	162,387	10,298	17,546	17,583	16,049	16,942	17,411	18,583	17,019	13,516	4,635	4,648	4,497	1,021	2,640
2009 ^b	157,606	8,643	16,847	17,086	15,828	16,169	16,725	18,052	16,825	13,710	4,430	5,098	4,529	1,032	2,632
<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	81,654	6,323	8,544	8,573	9,492	10,285	10,102	8,838	7,365	5,184	1,588	1,796	1,805	488	1,271
2001	82,006	5,944	8,689	8,422	9,460	10,063	10,191	9,106	7,566	5,488	1,630	1,847	1,848	477	1,275
2002	81,568	5,562	8,691	8,297	9,282	9,713	10,113	9,241	7,575	5,799	1,768	1,884	1,883	461	1,299
2003	81,263	5,233	8,691	8,264	9,028	9,435	10,060	9,296	7,670	5,991	1,896	1,945	1,939	482	1,334
2004	82,103	5,233	8,798	8,418	8,834	9,279	10,025	9,441	7,932	6,268	1,880	2,106	2,025	495	1,369
2005	83,073	5,374	8,849	8,649	8,572	9,275	9,859	9,580	8,213	6,553	1,820	2,266	2,113	530	1,420
2006	84,284	5,534	8,928	8,890	8,418	9,262	9,666	9,676	8,493	6,766	2,011	2,368	2,222	565	1,484
2007 ^b	85,105	5,509	8,976	9,059	8,422	9,202	9,439	9,698	8,694	6,866	2,346	2,383	2,390	568	1,554
2008 ^b	84,639	5,099	8,911	9,109	8,411	8,964	9,169	9,629	8,763	6,976	2,434	2,473	2,505	594	1,603
2009 ^b	81,574	4,214	8,484	8,791	8,243	8,498	8,744	9,310	8,611	7,028	2,297	2,676	2,492	591	1,595

(Continued)

Table 4.B5—Number of workers, by sex and age, selected years 1937–2009 (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	73,078	6,089	8,159	7,865	8,224	8,960	9,097	8,152	6,791	4,497	1,288	1,448	1,355	341	812
2001	73,410	5,809	8,293	7,658	8,228	8,721	9,144	8,344	7,005	4,800	1,358	1,484	1,383	351	833
2002	73,325	5,483	8,324	7,655	8,065	8,395	9,101	8,457	7,050	5,137	1,498	1,541	1,418	351	851
2003	73,313	5,250	8,327	7,640	7,912	8,093	9,010	8,583	7,161	5,396	1,610	1,609	1,487	343	892
2004	74,302	5,324	8,403	7,798	7,779	8,004	8,949	8,712	7,401	5,719	1,610	1,777	1,558	356	911
2005	75,438	5,475	8,511	8,005	7,607	8,038	8,835	8,834	7,633	6,038	1,595	1,914	1,641	374	937
2006	76,768	5,596	8,617	8,248	7,505	8,134	8,673	8,946	7,883	6,272	1,788	2,006	1,740	393	969
2007 ^b	77,800	5,594	8,662	8,422	7,594	8,081	8,489	9,004	8,091	6,411	2,115	2,036	1,887	399	1,014
2008 ^b	77,748	5,199	8,635	8,474	7,638	7,978	8,241	8,954	8,257	6,540	2,201	2,175	1,992	427	1,037
2009 ^b	76,032	4,429	8,363	8,296	7,585	7,672	7,981	8,741	8,213	6,682	2,132	2,422	2,038	440	1,037

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: (410) 965-0090 or statistics@ssa.gov.

4.B OASDI: Covered Workers

Table 4.B6—Median earnings of workers, by sex and age, selected years 1937–2009 (in dollars)

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–61	62–64	65–69	70–71	72 or older
<i>All workers</i>															
1937	761	170	570	829	998	1,061	1,126	1,121	1,177	1,020	1,010	927	^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	20,225	2,716	10,721	20,597	24,817	26,385	27,814	29,403	29,529	26,698	22,884	16,499	9,465	7,295	5,376
2001	20,905	2,718	10,703	20,981	25,601	27,228	28,544	30,128	30,414	27,685	23,679	17,736	10,556	7,861	5,743
2002	21,193	2,677	10,353	20,945	25,904	27,724	28,992	30,338	30,998	28,380	24,470	18,563	11,158	8,192	5,911
2003	21,610	2,633	10,320	21,044	26,464	28,331	29,484	30,910	31,562	29,126	25,452	19,302	11,875	8,698	5,965
2004	22,335	2,715	10,689	21,496	27,312	29,513	30,533	31,931	32,730	30,376	26,463	20,740	12,585	9,173	6,313
2005	22,985	2,758	11,009	22,031	27,926	30,521	31,377	32,639	33,682	31,463	27,702	21,935	13,321	9,638	6,630
2006	23,857	2,824	11,447	22,867	28,837	31,762	32,718	33,807	34,812	32,763	29,165	23,320	14,012	10,174	6,957
2007 ^b	24,603	2,914	11,670	23,519	29,725	32,788	33,760	34,921	35,732	34,063	30,282	24,688	14,720	10,930	7,231
2008 ^b	25,223	2,941	11,524	23,963	30,272	33,568	34,511	35,611	36,366	34,986	31,341	26,098	15,470	11,492	7,477
2009 ^b	24,853	2,762	10,516	22,978	29,499	33,040	34,226	34,937	35,810	34,546	31,389	26,465	16,018	11,319	7,502
<i>Men</i>															
1937	945	174	647	1,117	1,202	1,286	1,338	1,308	1,232	1,137	1,131	1,008	^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	25,032	2,804	12,191	23,403	29,404	32,354	35,218	36,932	37,917	34,717	28,850	21,076	10,487	7,903	5,791
2001	25,643	2,788	12,002	23,500	30,130	33,117	35,801	37,426	38,348	35,287	29,886	21,976	12,010	8,566	6,229
2002	25,765	2,748	11,560	23,238	30,420	33,658	35,994	37,574	38,285	35,806	30,715	22,844	12,611	8,834	6,418
2003	26,173	2,726	11,391	23,365	30,891	34,302	36,542	38,150	38,699	36,390	31,540	23,854	13,402	9,470	6,338
2004	27,061	2,801	11,872	23,833	31,977	35,756	37,890	39,584	40,120	37,840	32,960	25,872	14,479	9,927	6,665
2005	27,886	2,832	12,297	24,508	32,630	36,928	39,016	40,529	41,153	38,932	34,468	27,355	15,343	10,531	7,040
2006	28,918	2,897	12,852	25,416	33,717	38,501	40,497	41,888	42,504	40,299	36,118	29,359	16,374	11,427	7,367
2007 ^b	29,752	2,992	13,048	26,044	34,427	39,678	41,730	43,237	43,668	41,613	37,266	30,464	17,468	12,266	7,741
2008 ^b	30,282	3,019	12,747	26,299	34,991	40,258	42,520	44,212	44,417	42,442	38,360	31,823	18,296	12,540	7,891
2009 ^b	29,406	2,756	11,310	24,947	33,607	39,357	41,479	42,823	43,273	41,366	37,282	32,020	18,562	12,327	7,615

(Continued)

Table 4.B6—Median earnings of workers, by sex and age, selected years 1937–2009 (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	16,287	2,638	9,454	17,774	19,893	20,387	21,536	23,202	23,074	20,664	17,993	12,876	8,472	6,459	4,947
2001	17,037	2,649	9,536	18,341	20,736	21,114	22,222	24,035	24,149	21,797	18,733	14,055	9,214	7,117	5,200
2002	17,461	2,613	9,333	18,533	21,203	21,678	22,775	24,401	25,082	22,842	19,582	15,028	9,779	7,552	5,343
2003	17,845	2,554	9,367	18,674	21,750	22,317	23,192	24,933	25,806	23,486	20,506	15,520	10,424	7,947	5,469
2004	18,421	2,637	9,676	19,088	22,375	23,165	23,993	25,670	26,643	24,644	21,393	16,639	10,974	8,211	5,908
2005	18,886	2,693	9,914	19,486	22,876	23,949	24,583	26,051	27,450	25,593	22,290	17,442	11,496	8,609	6,240
2006	19,598	2,761	10,263	20,271	23,695	24,976	25,710	26,833	28,438	26,742	23,793	18,730	12,074	8,954	6,444
2007 ^b	20,367	2,843	10,489	20,967	24,744	25,979	26,540	27,746	29,135	27,974	24,994	20,139	12,580	9,676	6,682
2008 ^b	21,058	2,868	10,462	21,550	25,488	26,868	27,324	28,551	29,862	29,182	25,874	21,672	13,214	10,261	7,074
2009 ^b	21,172	2,767	9,824	21,038	25,454	27,010	27,573	28,530	29,858	29,301	26,564	22,463	13,958	10,252	7,360

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: (410) 965-0090 or statistics@ssa.gov.

4.B OASDI: Covered Workers

**Table 4.B7—Number of wage and salary workers, by sex and amount of taxable earnings, 1992–2009
(in thousands)**

Year	Total	Workers with earnings below the taxable maximum (by dollar amount of earnings)											Workers with maximum earnings	
		1–9,999	10,000–19,999	20,000–29,999	30,000–39,999	40,000–49,999	50,000–59,999	60,000–69,999	70,000–79,999	80,000–89,999	90,000–99,999	100,000–106,799		
<i>All wage and salary workers</i>														
1992	126,000	46,372	29,812	20,699	12,554	7,084	2,422	...	...	...	...	...	...	7,057
1993	128,100	46,571	29,900	21,134	12,786	7,371	3,325	...	...	...	...	...	...	7,013
1994	130,100	46,267	29,903	21,482	13,230	7,709	4,310	277	...	...	...	...	...	6,921
1995	132,800	45,781	30,142	22,097	13,853	8,171	4,662	498	...	...	...	...	...	7,597
1996	135,100	45,333	29,832	22,612	14,435	8,706	5,052	1,053	...	...	...	...	...	8,077
1997	137,765	44,407	29,676	23,076	15,243	9,330	5,523	2,106	...	...	...	...	...	8,405
1998	140,386	43,260	29,360	23,586	16,095	10,062	6,008	3,268	...	...	...	...	...	8,747
1999	142,703	42,682	28,975	23,861	16,763	10,546	6,456	3,974	856	...	...	...	...	8,589
2000	146,097	42,214	28,443	24,306	17,384	11,330	7,056	4,439	1,994	...	...	...	...	8,933
2001	146,596	41,296	27,746	23,983	17,661	11,776	7,462	4,730	3,151	177	...	...	...	8,614
2002	145,793	40,873	26,910	23,495	17,607	11,853	7,662	4,957	3,329	1,266	...	...	...	7,840
2003	145,101	40,165	26,247	22,988	17,541	11,996	7,794	5,173	3,467	1,821	...	...	...	7,909
2004	146,662	39,515	25,914	22,822	17,672	12,370	8,221	5,571	3,767	2,213	...	...	...	8,597
2005	148,530	39,134	25,683	22,867	17,910	12,719	8,559	5,821	3,972	2,878	...	...	...	8,987
2006	150,787	38,672	25,237	22,742	18,210	13,161	9,002	6,242	4,308	3,017	1,102	...	...	9,093
2007 ^a	152,471	38,084	24,876	22,534	18,294	13,449	9,438	6,598	4,595	3,269	1,951	...	...	9,383
2008 ^a	152,121	37,213	24,354	21,982	18,156	13,419	9,643	6,802	4,819	3,490	2,538	532	...	9,173
2009 ^a	147,599	36,794	23,713	20,952	17,328	12,797	9,271	6,541	4,714	3,443	2,503	1,432	...	8,110
<i>Men</i>														
1992	66,543	20,640	13,773	11,128	8,069	5,109	1,868	...	...	...	...	...	...	5,955
1993	67,673	20,834	13,875	11,270	8,074	5,224	2,527	...	...	...	...	...	...	5,869
1994	68,481	20,444	13,836	11,360	8,211	5,372	3,243	222	...	...	...	...	...	5,794
1995	69,901	20,223	13,865	11,653	8,448	5,587	3,444	388	...	...	...	...	...	6,292
1996	70,670	19,771	13,491	11,791	8,667	5,838	3,672	800	...	...	...	...	...	6,641
1997	71,910	19,352	13,199	11,864	8,957	6,162	3,932	1,582	...	...	...	...	...	6,862
1998	73,111	18,800	12,868	11,946	9,297	6,520	4,199	2,406	...	...	...	...	...	7,074
1999	74,376	18,635	12,595	11,942	9,565	6,711	4,456	2,895	642	...	...	...	...	6,936
2000	76,033	18,468	12,241	11,958	9,755	7,070	4,734	3,170	1,474	...	...	...	...	7,163
2001	76,303	18,298	11,985	11,629	9,763	7,170	4,907	3,268	2,284	136	...	...	...	6,862
2002	75,711	18,291	11,693	11,258	9,612	7,065	4,925	3,341	2,372	937	...	...	...	6,217
2003	75,200	17,972	11,396	10,993	9,475	7,072	4,921	3,425	2,428	1,308	...	...	...	6,210
2004	75,910	17,632	11,236	10,812	9,423	7,216	5,111	3,659	2,588	1,562	...	...	...	6,670
2005	76,758	17,385	11,032	10,820	9,462	7,378	5,273	3,778	2,677	2,026	...	...	...	6,926
2006	77,820	17,205	10,773	10,629	9,524	7,527	5,458	4,003	2,869	2,068	788	...	...	6,977
2007 ^a	78,605	17,033	10,656	10,387	9,446	7,557	5,635	4,144	3,002	2,235	1,368	...	...	7,142
2008 ^a	78,377	16,891	10,393	10,122	9,261	7,380	5,648	4,186	3,104	2,313	1,747	377	...	6,956
2009 ^a	75,615	17,091	10,220	9,578	8,661	6,902	5,281	3,915	2,965	2,235	1,673	989	...	6,105

(Continued)

**Table 4.B7—Number of wage and salary workers, by sex and amount of taxable earnings, 1992–2009
(in thousands)—Continued**

Year	Total	Workers with earnings below the taxable maximum (by dollar amount of earnings)											Workers with maximum earnings
		1–9,999	10,000–19,999	20,000–29,999	30,000–39,999	40,000–49,999	50,000–59,999	60,000–69,999	70,000–79,999	80,000–89,999	90,000–99,999	100,000–106,799	
<i>Women</i>													
1992	59,457	25,732	16,039	9,571	4,485	1,975	554	...	...	...	...	...	1,103
1993	60,427	25,737	16,026	9,864	4,712	2,147	798	...	...	...	...	...	1,144
1994	61,619	25,823	16,068	10,122	5,020	2,337	1,067	55	...	...	...	...	1,127
1995	62,900	25,558	16,277	10,444	5,405	2,584	1,217	110	...	...	...	...	1,305
1996	64,429	25,563	16,341	10,819	5,768	2,868	1,380	253	...	...	...	...	1,437
1997	65,855	25,054	16,477	11,211	6,285	3,169	1,591	524	...	...	...	...	1,543
1998	67,275	24,460	16,492	11,640	6,798	3,541	1,808	862	...	...	...	...	1,673
1999	68,327	24,048	16,380	11,919	7,199	3,835	2,000	1,079	214	...	...	...	1,652
2000	70,064	23,745	16,203	12,348	7,630	4,260	2,321	1,268	519	...	...	...	1,770
2001	70,293	22,997	15,761	12,354	7,898	4,606	2,555	1,462	867	41	...	...	1,752
2002	70,082	22,581	15,218	12,237	7,995	4,788	2,737	1,617	958	329	...	...	1,624
2003	69,901	22,193	14,852	11,995	8,066	4,924	2,873	1,748	1,038	513	...	...	1,699
2004	70,752	21,884	14,678	12,010	8,249	5,154	3,110	1,912	1,179	650	...	...	1,926
2005	71,772	21,749	14,650	12,047	8,448	5,341	3,286	2,042	1,295	852	...	...	2,061
2006	72,967	21,467	14,464	12,113	8,686	5,634	3,544	2,240	1,439	949	314	...	2,116
2007 ^a	73,866	21,050	14,220	12,147	8,849	5,892	3,803	2,455	1,593	1,035	583	...	2,240
2008 ^a	73,744	20,322	13,961	11,860	8,894	6,039	3,996	2,616	1,715	1,177	792	155	2,217
2009 ^a	71,984	19,703	13,493	11,374	8,667	5,896	3,989	2,626	1,749	1,208	830	443	2,004

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

NOTES: Taxable earnings consist of self-employment income and taxable wages.

Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Preliminary data.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

4.B OASDI: Covered Workers

Table 4.B8—Number of self-employed workers, by sex and age, selected years 1951–2009
(in thousands)

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–61	62–64	65–69	70–71	72 or older
<i>All self-employed workers</i>															
1951	4,190	6	71	246	414	543	592	565	503	462	164	215	237	55	117
1955	6,810	18	114	362	600	757	865	874	790	737	290	441	497	143	322
1960	6,870	19	133	305	560	743	848	929	918	846	316	452	414	101	286
1965	6,550	31	143	292	452	664	814	870	913	885	328	411	388	92	267
1970	6,270	33	159	348	476	581	729	808	837	839	327	407	388	94	244
1975	7,000	67	302	581	679	700	731	813	869	823	317	382	393	95	248
1980	8,200	78	380	824	1,052	983	869	812	851	852	307	381	419	112	280
1985	10,600	112	527	1,099	1,488	1,522	1,261	1,030	930	929	368	434	455	124	321
1990	12,500	152	529	1,123	1,663	1,854	1,736	1,377	1,113	980	381	487	567	150	389
1991	12,800	136	521	1,105	1,697	1,897	1,818	1,474	1,170	998	388	486	561	158	391
1992	13,100	137	509	1,093	1,678	1,951	1,864	1,589	1,243	1,018	382	484	576	166	410
1993	13,200	131	488	1,029	1,650	1,956	1,892	1,647	1,325	1,047	375	481	589	164	426
1994	13,300	140	473	989	1,624	1,936	1,945	1,726	1,357	1,070	375	482	580	164	437
1995	13,500	143	482	1,005	1,612	1,960	1,964	1,808	1,393	1,097	385	467	574	166	445
1996	13,900	147	490	1,036	1,614	2,013	2,035	1,873	1,471	1,144	404	475	575	164	458
1997	14,020	151	498	1,030	1,548	1,978	2,053	1,874	1,555	1,203	402	485	592	169	483
1998	14,230	162	510	1,045	1,524	1,963	2,092	1,885	1,616	1,265	415	493	590	178	492
1999	14,500	171	535	1,040	1,521	1,965	2,088	1,969	1,684	1,322	420	514	595	174	502
2000	14,675	173	554	1,016	1,495	1,948	2,093	2,014	1,785	1,345	443	522	591	180	515
2001	14,930	173	598	1,036	1,526	1,907	2,113	2,042	1,825	1,421	457	526	610	178	519
2002	15,858	175	700	1,112	1,626	1,898	2,191	2,158	1,911	1,578	537	585	651	172	564
2003	15,969	176	703	1,123	1,638	1,915	2,209	2,177	1,924	1,588	541	587	652	173	565
2004	16,496	189	747	1,194	1,643	1,948	2,236	2,228	1,992	1,684	533	649	691	183	580
2005	17,098	211	815	1,281	1,662	2,013	2,256	2,283	2,066	1,764	528	691	739	194	595
2006	17,724	215	871	1,379	1,665	2,085	2,255	2,353	2,147	1,848	580	721	780	212	612
2007 ^a	18,188	227	929	1,451	1,717	2,108	2,224	2,383	2,206	1,854	679	728	826	219	639
2008 ^a	17,870	218	929	1,478	1,679	2,029	2,109	2,302	2,149	1,833	673	734	864	219	654
2009 ^a	16,882	194	867	1,382	1,595	1,855	1,966	2,138	2,038	1,779	609	774	828	216	641
<i>Men</i>															
1951	3,620	5	61	219	370	478	519	479	430	393	139	179	204	47	97
1955	5,980	16	104	335	555	687	773	773	679	631	247	373	420	122	265
1960	5,990	16	119	284	515	678	757	812	793	709	260	386	348	83	230
1965	5,640	26	127	263	410	598	714	759	772	742	272	339	326	75	217
1970	5,370	28	136	306	422	522	642	699	712	695	268	324	320	77	201
1975	5,790	57	251	479	564	584	619	680	715	672	255	309	326	78	201
1980	6,407	60	305	639	793	752	672	641	681	668	244	301	333	92	226
1985	7,623	79	378	782	1,060	1,058	873	730	674	686	278	328	351	97	249
1990	8,525	103	346	746	1,112	1,241	1,148	914	762	693	270	355	424	116	295
1991	8,668	92	341	726	1,109	1,268	1,204	976	793	699	273	350	418	119	299
1992	8,798	89	330	714	1,090	1,289	1,228	1,041	830	706	271	344	427	126	312
1993	8,840	89	310	674	1,075	1,290	1,241	1,078	885	713	261	341	436	125	322
1994	8,839	89	309	638	1,053	1,269	1,268	1,127	890	723	263	333	423	122	331
1995	8,908	97	305	648	1,030	1,271	1,281	1,170	906	735	269	325	413	124	335
1996	9,074	94	306	658	1,021	1,281	1,322	1,200	954	754	276	328	415	119	346
1997	9,078	98	311	638	975	1,245	1,313	1,197	997	788	275	334	420	122	365
1998	9,109	98	314	641	947	1,217	1,326	1,188	1,033	819	275	338	415	130	368
1999	9,225	107	319	632	948	1,207	1,314	1,240	1,063	844	279	352	415	127	377
2000	9,277	106	328	604	913	1,193	1,310	1,268	1,128	856	294	348	415	130	383
2001	9,354	102	345	613	912	1,163	1,320	1,280	1,145	893	297	349	426	129	379
2002	9,778	109	395	636	955	1,147	1,333	1,331	1,187	983	338	380	445	124	415
2003	9,860	109	397	645	964	1,160	1,347	1,346	1,195	990	341	381	446	125	416
2004	10,088	111	410	682	951	1,165	1,343	1,373	1,233	1,045	338	417	471	128	423
2005	10,395	126	448	722	958	1,185	1,352	1,398	1,272	1,093	328	441	500	139	433
2006	10,705	125	470	777	954	1,204	1,343	1,433	1,317	1,147	359	458	524	152	442
2007 ^a	10,865	133	497	800	968	1,208	1,317	1,427	1,345	1,130	422	455	548	153	463
2008 ^a	10,464	122	474	789	924	1,128	1,223	1,348	1,290	1,103	421	455	565	153	470
2009 ^a	9,688	105	417	703	850	1,009	1,106	1,231	1,212	1,062	374	473	537	148	462

(Continued)

**Table 4.B8—Number of self-employed workers, by sex and age, selected years 1951–2009
(in thousands)—Continued**

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–61	62–64	65–69	70–71	72 or older
<i>Women</i>															
1951	570	1	10	27	44	65	73	86	73	69	25	36	33	8	20
1955	830	2	10	27	45	70	92	101	111	106	43	68	77	21	57
1960	880	3	14	21	45	65	91	117	125	137	56	66	67	18	55
1965	910	5	16	29	42	66	100	111	141	143	56	72	62	17	50
1970	900	5	23	42	54	59	87	109	125	144	59	65	68	17	43
1975	1,210	10	51	102	115	116	112	133	154	151	62	73	67	17	47
1980	1,793	18	75	185	259	231	197	171	170	184	63	80	86	20	54
1985	2,977	33	149	317	428	464	388	300	256	243	90	106	104	27	72
1990	3,975	49	183	377	551	613	588	463	350	287	111	132	142	34	94
1991	4,131	44	180	378	588	629	614	499	376	299	115	136	143	39	92
1992	4,302	48	179	380	588	662	636	548	413	312	110	140	148	39	98
1993	4,360	41	178	355	575	666	651	569	440	334	114	140	153	39	104
1994	4,460	51	164	352	572	667	677	599	468	346	112	148	157	42	105
1995	4,592	46	177	357	582	689	683	638	487	362	116	142	161	42	109
1996	4,826	54	183	377	594	733	713	673	517	390	128	147	160	45	112
1997	4,942	54	188	392	572	733	739	676	558	415	128	151	172	47	118
1998	5,121	65	196	404	577	746	767	697	583	445	140	155	175	48	124
1999	5,276	64	216	408	573	757	773	729	621	478	141	162	180	47	126
2000	5,398	68	226	412	582	754	783	747	657	489	148	173	176	50	132
2001	5,576	71	253	423	614	744	793	762	680	528	160	177	184	49	139
2002	6,080	66	305	475	671	751	858	827	724	595	199	205	206	48	148
2003	6,109	67	305	478	675	755	862	831	729	598	200	206	206	49	149
2004	6,408	77	338	512	692	784	893	855	758	640	195	232	220	55	157
2005	6,703	85	367	560	704	828	904	885	795	672	201	250	238	54	162
2006	7,019	90	401	602	711	880	912	920	830	701	221	264	256	60	170
2007 ^a	7,323	94	432	651	749	900	907	955	861	724	257	273	278	66	175
2008 ^a	7,406	97	455	689	755	901	886	954	860	729	253	278	299	67	184
2009 ^a	7,194	89	450	678	745	847	860	907	826	717	235	301	291	69	179

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

NOTES: Age refers to age attained during year.

Totals do not necessarily equal the sum of rounded components.

a. Preliminary data.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

4.B OASDI: Covered Workers

**Table 4.B9—Number of self-employed workers, by sex and amount of taxable earnings, 1992–2009
(in thousands)**

Year	Total	Workers with earnings below taxable maximum (by dollar amount of earnings)											Workers with maximum earnings
		1–9,999	10,000–19,999	20,000–29,999	30,000–39,999	40,000–49,999	50,000–59,999	60,000–69,999	70,000–79,999	80,000–89,999	90,000–99,999	100,000–106,799	
<i>All self-employed workers</i>													
1992	13,098	6,039	2,755	1,576	971	612	308	...	...	...	...	...	839
1993	13,202	6,015	2,776	1,570	990	633	388	...	...	...	...	...	828
1994	13,297	5,886	2,832	1,586	1,019	645	426	92	...	...	...	...	814
1995	13,499	5,909	2,882	1,604	1,044	678	444	116	...	...	...	...	822
1996	13,900	5,979	2,964	1,650	1,092	713	471	176	...	...	...	...	854
1997	14,019	5,911	2,966	1,670	1,100	737	489	278	...	...	...	...	869
1998	14,237	5,835	3,010	1,717	1,157	777	505	387	...	...	...	...	848
1999	14,499	5,745	3,075	1,756	1,191	804	535	384	162	...	...	...	848
2000	14,672	5,592	3,019	1,730	1,189	811	560	399	269	...	...	...	1,104
2001	14,930	5,625	3,123	1,741	1,186	834	584	400	314	82	...	...	1,042
2002	15,249	5,810	3,305	1,777	1,202	850	601	426	305	197	...	...	776
2003	15,969	6,018	3,489	1,852	1,254	899	641	441	327	250	...	...	798
2004	16,496	6,065	3,639	1,919	1,277	950	672	472	350	300	...	...	852
2005	17,098	6,087	3,745	2,006	1,372	990	724	508	375	388	...	...	902
2006	17,724	6,172	3,914	2,077	1,413	1,032	752	554	409	311	202	...	887
2007 ^a	18,188	6,384	4,008	2,085	1,405	1,043	779	575	423	329	295	...	862
2008 ^a	17,870	6,295	4,067	1,970	1,320	982	748	559	421	327	250	136	795
2009 ^a	16,882	6,319	3,923	1,742	1,166	860	639	493	357	294	224	202	663
<i>Men</i>													
1992	8,795	3,497	1,936	1,145	746	485	252	...	...	...	...	...	734
1993	8,841	3,482	1,927	1,141	760	500	316	...	...	...	...	...	715
1994	8,839	3,331	1,958	1,153	772	503	340	77	...	...	...	...	705
1995	8,908	3,329	1,964	1,152	782	521	356	96	...	...	...	...	708
1996	9,075	3,313	1,997	1,176	807	545	367	141	...	...	...	...	729
1997	9,077	3,233	1,980	1,171	796	559	381	223	...	...	...	...	735
1998	9,116	3,150	1,955	1,189	831	584	389	309	...	...	...	...	710
1999	9,224	3,066	1,972	1,202	848	591	409	299	129	...	...	...	709
2000	9,277	2,944	1,908	1,159	830	585	415	304	211	...	...	...	920
2001	9,354	2,947	1,934	1,159	812	596	423	305	247	66	...	...	865
2002	9,442	3,048	2,024	1,175	823	594	439	310	231	155	...	...	643
2003	9,860	3,158	2,103	1,228	853	637	461	324	248	194	...	...	654
2004	10,088	3,152	2,144	1,252	868	663	480	346	260	230	...	...	694
2005	10,395	3,148	2,166	1,297	920	687	511	368	276	295	...	...	727
2006	10,705	3,175	2,216	1,329	935	709	524	400	301	231	157	...	728
2007 ^a	10,865	3,279	2,233	1,318	913	701	539	403	307	243	226	...	703
2008 ^a	10,464	3,197	2,179	1,229	840	645	513	386	299	236	188	105	648
2009 ^a	9,688	3,185	2,046	1,076	731	558	432	338	252	214	164	150	541

(Continued)

**Table 4.B9—Number of self-employed workers, by sex and amount of taxable earnings, 1992–2009
(in thousands)—Continued**

Year	Total	Workers with earnings below taxable maximum (by dollar amount of earnings)											Workers with maximum earnings
		1–9,999	10,000–19,999	20,000–29,999	30,000–39,999	40,000–49,999	50,000–59,999	60,000–69,999	70,000–79,999	80,000–89,999	90,000–99,999	100,000–106,799	
<i>Women</i>													
1992	4,303	2,541	819	431	225	127	55	...	...	...	...	...	105
1993	4,361	2,534	849	429	230	133	73	...	...	...	...	...	113
1994	4,458	2,553	873	435	246	142	85	15	...	...	...	...	109
1995	4,591	2,581	918	452	261	157	88	20	...	...	...	...	114
1996	4,825	2,666	967	475	285	168	104	35	...	...	...	...	125
1997	4,942	2,679	986	499	303	178	108	55	...	...	...	...	134
1998	5,121	2,686	1,056	528	327	193	116	78	...	...	...	...	138
1999	5,276	2,679	1,103	554	343	212	126	85	33	...	...	...	139
2000	5,395	2,646	1,111	570	359	226	145	95	58	...	...	...	184
2001	5,576	2,677	1,189	581	374	238	161	95	67	17	...	...	177
2002	5,807	2,762	1,281	602	379	256	162	116	74	42	...	...	133
2003	6,109	2,861	1,385	625	401	262	180	117	79	55	...	...	145
2004	6,408	2,913	1,495	667	409	288	192	126	90	70	...	...	159
2005	6,703	2,939	1,579	709	452	303	213	140	99	93	...	...	175
2006	7,019	2,997	1,698	748	478	324	228	154	108	80	44	...	160
2007 ^a	7,323	3,105	1,775	766	492	342	240	172	116	86	69	...	159
2008 ^a	7,406	3,098	1,888	742	480	337	235	173	122	91	62	31	147
2009 ^a	7,194	3,134	1,877	665	435	301	206	155	106	80	60	52	122

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

NOTES: Taxable earnings consist of self-employment income and taxable wages.

Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Preliminary data.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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, 2009

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	157,606	147,599	16,882	5,268,272	4,990,900	277,372	653,266	618,872	34,394
Alabama	2,276	2,137	244	69,258	65,903	3,355	8,588	8,172	416
Alaska	384	361	42	13,434	12,648	786	1,666	1,568	97
Arizona	2,863	2,704	279	93,839	89,658	4,181	11,636	11,118	519
Arkansas	1,428	1,339	153	39,449	37,414	2,035	4,892	4,639	252
California	16,501	15,021	2,245	605,394	563,488	41,906	75,069	69,873	5,196
Colorado	2,469	2,290	300	85,362	80,127	5,235	10,585	9,936	649
Connecticut	1,956	1,824	211	78,300	73,263	5,038	9,709	9,085	625
Delaware	506	486	36	17,788	17,253	534	2,206	2,139	66
District of Columbia	391	372	34	16,685	15,860	825	2,069	1,967	102
Florida	8,805	8,154	1,088	271,788	258,158	13,630	33,702	32,012	1,690
Georgia	4,562	4,259	522	146,303	139,228	7,075	18,142	17,264	877
Hawaii	711	670	69	24,577	23,358	1,219	3,047	2,896	151
Idaho	762	715	85	21,906	20,655	1,251	2,716	2,561	155
Illinois	6,437	6,033	701	222,730	211,426	11,305	27,619	26,217	1,402
Indiana	3,582	3,422	303	107,575	102,856	4,718	13,339	12,754	585
Iowa	1,728	1,621	192	52,286	49,143	3,142	6,483	6,094	390
Kansas	1,559	1,470	162	49,975	47,094	2,882	6,197	5,840	357
Kentucky	2,128	2,000	226	60,780	57,670	3,110	7,537	7,151	386
Louisiana	2,112	1,969	242	64,154	60,324	3,830	7,955	7,480	475
Maine	742	686	90	20,930	19,579	1,350	2,595	2,428	167
Maryland	3,166	2,999	301	132,022	126,367	5,655	16,371	15,670	701
Massachusetts	3,424	3,190	378	132,770	125,028	7,743	16,464	15,503	960
Michigan	4,952	4,672	496	154,725	147,739	6,986	19,186	18,320	866
Minnesota	3,080	2,909	316	108,003	102,772	5,231	13,392	12,744	649
Mississippi	1,362	1,275	155	37,992	35,817	2,176	4,711	4,441	270
Missouri	3,061	2,886	307	91,782	87,268	4,513	11,381	10,821	560
Montana	543	502	70	14,629	13,590	1,039	1,814	1,685	129
Nebraska	1,062	1,006	110	32,843	30,994	1,848	4,072	3,843	229
Nevada	1,175	1,114	104	36,893	35,225	1,667	4,575	4,368	207
New Hampshire	802	752	83	28,922	27,306	1,617	3,586	3,386	200
New Jersey	4,703	4,432	464	198,167	188,344	9,823	24,573	23,355	1,218
New Mexico	949	894	94	28,385	26,985	1,401	3,520	3,346	174
New York	10,074	9,370	1,171	379,940	360,185	19,754	47,113	44,663	2,450
North Carolina	4,676	4,401	483	146,425	139,352	7,073	18,157	17,280	877
North Dakota	403	380	45	12,130	11,158	971	1,504	1,384	120
Ohio	5,598	5,248	567	167,703	159,326	8,377	20,795	19,756	1,039
Oklahoma	1,894	1,780	204	54,957	52,179	2,778	6,815	6,470	344
Oregon	1,894	1,770	202	61,019	57,751	3,268	7,566	7,161	405
Pennsylvania	6,694	6,353	599	229,531	219,112	10,419	28,462	27,170	1,292
Rhode Island	587	556	58	20,284	19,293	990	2,515	2,392	123
South Carolina	2,188	2,071	205	65,260	62,441	2,819	8,092	7,743	350
South Dakota	494	464	59	13,286	12,404	881	1,647	1,538	109
Tennessee	3,153	2,918	384	94,878	88,101	6,777	11,765	10,925	840
Texas	11,456	10,597	1,431	379,635	356,409	23,227	47,075	44,195	2,880
Utah	1,335	1,276	123	41,098	39,507	1,591	5,096	4,899	197

(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, 2009—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	405	379	45	12,159	11,422	737	1,508	1,416	91
Virginia	4,313	4,098	390	165,635	158,836	6,799	20,539	19,696	843
Washington	3,435	3,247	320	129,286	123,247	6,040	16,031	15,283	749
West Virginia	857	810	80	25,525	24,198	1,326	3,165	3,001	164
Wisconsin	3,169	3,019	275	102,147	98,035	4,111	12,666	12,156	510
Wyoming	332	317	32	10,815	10,329	486	1,341	1,281	60
Outlying area									
Puerto Rico	1,160	1,078	100	24,319	22,598	1,721	3,016	2,802	213
Other and unknown ^e	3,309	3,303	8	72,595	72,473	121	9,002	8,987	15

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

NOTE: Data are based on preliminary estimates.

- a. Most state assignments are based on end-of-year residence obtained from electronically filed employer wage reports; the remainder are based on location of employer from reports filed on paper.
- b. 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.
- c. Includes Social Security taxable wages as reported by employers and Social Security taxable self-employment income as reported by self-employed individuals. Annual maximum taxable earnings for Social Security (OASDI) from a single employer or from self-employment were \$106,800 in 2009. Totals do not necessarily equal the sum of rounded components.
- d. For 2009 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. Totals do not necessarily equal the sum of rounded components.
- e. Persons employed in American Samoa, Guam, Northern Mariana Islands, and U.S. Virgin Islands; U.S. citizens employed abroad by U.S. employers; persons employed on U.S. oceanborne vessels; and workers with unknown residence.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 1937–2010

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 1937–2010—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	154,732	146,097	14,675	4,008,500	3,798,400	210,100	497,054	471,002	26,052
2001	155,416	146,596	14,930	4,167,900	3,950,100	217,800	516,820	489,812	27,007
2002	154,893	145,793	15,249	4,250,100	4,021,800	228,300	527,012	498,703	28,309
2003	154,576	145,101	15,969	4,355,000	4,114,000	241,000	540,020	510,136	29,884
2004	156,405	146,662	16,496	4,554,500	4,295,900	258,600	564,758	532,692	32,066
2005	158,511	148,530	17,098	4,766,000	4,490,500	275,500	590,984	556,822	34,162
2006	161,052	150,787	17,724	5,043,400	4,751,700	291,700	625,382	589,211	36,171
2007 ^e	162,905	152,471	18,188	5,266,100	4,969,600	296,500	652,996	616,230	36,766
2008 ^e	162,387	152,121	17,870	5,433,200	5,140,600	292,600	673,717	637,434	36,282
2009 ^f	157,606	147,599	16,882	5,268,272	4,990,900	277,372	653,266	618,872	34,394
2010 ^g	156,725	146,838	16,154	5,332,760	5,049,539	283,221	661,262	626,143	35,119

SOURCE: Social Security Administration, Master Earnings File, 1 percent sample; Bureau of Economic Analysis; Bureau of Labor Statistics.

NOTES: . . . = not applicable.

Totals do not necessarily equal the sum of rounded components.

- 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. Includes Social Security taxable wages as reported by employers and Social Security taxable self-employment income as reported by self-employed individuals. See Table 2.A3 for annual maximum taxable earnings.
- c. See Table 2.A3 for contribution rates.
- d. Data are 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: (410) 965-0090 or statistics@ssa.gov.

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, 2009

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	161,421	151,563	17,581	6,407,249	5,971,300	435,949	185,810	173,168	12,643
Alabama	2,282	2,141	251	76,514	72,029	4,485	2,219	2,089	130
Alaska	414	393	43	17,132	15,881	1,251	497	461	36
Arizona	2,869	2,709	292	105,274	99,687	5,587	3,053	2,891	162
Arkansas	1,431	1,342	157	43,518	41,050	2,468	1,262	1,190	72
California	17,456	16,011	2,336	807,969	739,101	68,868	23,431	21,434	1,997
Colorado	2,659	2,491	312	110,980	103,326	7,654	3,218	2,996	222
Connecticut	1,999	1,869	225	114,261	103,550	10,711	3,314	3,003	311
Delaware	506	487	37	20,192	19,280	912	586	559	26
District of Columbia	398	379	36	22,272	19,948	2,324	646	578	67
Florida	8,858	8,208	1,124	314,159	295,767	18,392	9,111	8,577	533
Georgia	4,668	4,368	540	174,300	163,758	10,542	5,055	4,749	306
Hawaii	728	688	70	27,714	25,949	1,765	804	753	51
Idaho	762	716	86	23,718	22,261	1,457	688	646	42
Illinois	6,709	6,321	732	288,512	269,588	18,924	8,367	7,818	549
Indiana	3,591	3,431	313	118,448	112,074	6,374	3,435	3,250	185
Iowa	1,730	1,622	197	56,483	52,900	3,583	1,638	1,534	104
Kansas	1,563	1,474	168	55,817	52,129	3,687	1,619	1,512	107
Kentucky	2,183	2,058	233	68,731	64,525	4,205	1,993	1,871	122
Louisiana	2,300	2,165	251	80,668	75,380	5,289	2,339	2,186	153
Maine	773	719	92	24,821	23,175	1,646	720	672	48
Maryland	3,212	3,045	321	158,900	149,148	9,752	4,608	4,325	283
Massachusetts	3,680	3,464	402	180,132	166,949	13,183	5,224	4,842	382
Michigan	4,963	4,681	519	176,014	164,675	11,338	5,104	4,776	329
Minnesota	3,085	2,913	332	122,841	116,190	6,652	3,562	3,370	193
Mississippi	1,367	1,278	158	41,069	38,507	2,562	1,191	1,117	74
Missouri	3,130	2,957	318	106,783	100,835	5,948	3,097	2,924	172
Montana	544	503	71	15,871	14,698	1,174	460	426	34
Nebraska	1,065	1,008	114	36,745	34,467	2,278	1,066	1,000	66
Nevada	1,268	1,210	108	48,751	44,335	4,416	1,414	1,286	128
New Hampshire	812	762	86	33,359	31,443	1,917	967	912	56
New Jersey	4,719	4,447	497	253,121	234,689	18,432	7,341	6,806	535
New Mexico	957	902	97	31,890	29,325	2,565	925	850	74
New York	10,071	9,363	1,233	495,355	449,909	45,446	14,365	13,047	1,318
North Carolina	4,677	4,400	501	164,320	154,060	10,260	4,765	4,468	298
North Dakota	404	381	46	13,388	12,163	1,225	388	353	36
Ohio	6,110	5,794	588	216,677	205,368	11,309	6,284	5,956	328
Oklahoma	1,906	1,792	210	60,927	57,694	3,233	1,767	1,673	94
Oregon	1,896	1,772	207	67,264	63,224	4,040	1,951	1,834	117
Pennsylvania	6,713	6,370	627	266,815	252,138	14,677	7,738	7,312	426
Rhode Island	595	564	61	23,850	21,918	1,931	692	636	56
South Carolina	2,186	2,068	212	72,562	68,718	3,844	2,104	1,993	111
South Dakota	495	465	61	14,754	13,701	1,052	428	397	31
Tennessee	3,166	2,930	397	112,336	101,509	10,827	3,258	2,944	314
Texas	12,108	11,276	1,484	475,516	441,776	33,740	13,790	12,812	978
Utah	1,341	1,282	129	48,042	45,733	2,309	1,393	1,326	67

(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, 2009—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	404	378	46	13,198	12,340	858	383	358	25
Virginia	4,341	4,125	416	196,463	184,345	12,117	5,697	5,346	351
Washington	3,452	3,264	335	147,829	139,663	8,166	4,287	4,050	237
West Virginia	861	814	83	28,891	26,364	2,527	838	765	73
Wisconsin	3,172	3,021	285	113,771	108,607	5,164	3,299	3,150	150
Wyoming	332	317	34	13,867	13,197	670	402	383	19
Outlying area									
Puerto Rico	1,196	1,114	101	27,019	24,968	2,051	784	724	59
Other and unknown ^e	3,317	3,311	8	77,446	77,287	159	2,246	2,241	5

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

NOTE: Data are based on preliminary estimates.

- Most state assignments are based on end-of-year residence obtained from electronically filed employer wage reports; the remainder are based on location of employer from reports filed on 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. Totals do not necessarily equal the sum of rounded components.
- For 2009 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. Totals do not necessarily equal the sum of rounded components.
- Persons employed in American Samoa, Guam, Northern Mariana Islands, and U.S. Virgin Islands; U.S. citizens employed abroad by U.S. employers; persons employed on U.S. oceanborne vessels; and workers with unknown residence.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

4.B OASDI: Covered Workers

Table 4.B13—Social Security (OASDI) taxable earnings, by sex and age, 2009

Sex	Total, all ages ^a	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	5,268,272	37,369	691,948	1,205,792	1,467,797	1,312,508	174,995	183,569	128,564	65,729
Men	3,111,174	19,156	380,512	711,665	882,357	773,628	104,653	111,929	82,704	44,571
Women	2,157,097	18,213	311,436	494,127	585,440	538,880	70,342	71,640	45,861	21,158
Percentage distribution, by age										
All workers	100	1	13	23	28	25	3	3	2	1
Men	100	1	12	23	28	25	3	4	3	1
Women	100	1	14	23	27	25	3	3	2	1
Percentage distribution, by sex										
All workers	100	100	100	100	100	100	100	100	100	100
Men	59	51	55	59	60	59	60	61	64	68
Women	41	49	45	41	40	41	40	39	36	32

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

NOTES: Includes Social Security taxable wages as reported by employers and Social Security taxable self-employment income as reported by self-employed individuals.

Totals do not necessarily equal the sum of rounded components.

a. Includes workers of unknown age.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 4.B14—Medicare Part A (HI) taxable earnings, by sex and age, 2009

Sex	Total, all ages ^a	Under 20	20–29	30–39	40–49	50–59	60–61	62–64	65–69	70 or older
Medicare Part A (HI) taxable earnings (in millions of dollars)										
All workers	6,407,249	37,647	724,920	1,388,336	1,830,047	1,691,821	229,672	242,101	175,680	87,024
Men	3,981,445	19,311	399,139	839,795	1,158,770	1,066,110	149,452	160,700	124,477	63,692
Women	2,425,803	18,336	325,781	548,541	671,277	625,711	80,220	81,401	51,203	23,333
Percentage distribution, by age										
All workers	100	1	11	22	29	26	4	4	3	1
Men	100	0	10	21	29	27	4	4	3	2
Women	100	1	13	23	28	26	3	3	2	1
Percentage distribution, by sex										
All workers	100	100	100	100	100	100	100	100	100	100
Men	62	51	55	60	63	63	65	66	71	73
Women	38	49	45	40	37	37	35	34	29	27

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

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

a. Includes workers of unknown age.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

4.C OASDI: Insured Workers

**Table 4.C1—Estimated number of insured workers, by insured status, December 31, 1940–2011
(in millions)**

Year	Fully insured for retirement benefits, survivor benefits, or both			Insured in event of disability
	Total	Permanently insured	Not permanently insured	
1940	24.2	1.1	23.1	...
1941	25.8	1.4	24.4	...
1942	28.1	1.8	26.3	...
1943	29.9	2.3	27.6	...
1944	31.9	2.8	29.1	...
1945	33.4	3.4	30.0	...
1946	35.4	8.6	26.8	...
1947	37.3	11.6	25.7	...
1948	38.9	13.2	25.7	...
1949	40.1	14.9	25.2	...
1950	59.8	21.0	38.8	...
1951	62.8	22.9	39.9	...
1952	68.2	25.6	42.7	...
1953	71.0	27.7	43.4	...
1954	70.2	29.9	40.4	31.9
1955	70.5	32.5	38.0	35.4
1956	74.0	36.1	38.0	37.2
1957	76.1	38.3	37.9	38.4
1958	76.5	40.3	36.2	43.4
1959	76.7	42.2	34.6	46.4
1960	84.4	47.6	36.8	48.5
1961	88.5	53.3	35.3	50.5
1962	89.8	54.9	34.8	51.5
1963	91.3	56.6	34.7	52.3
1964	92.8	58.3	34.5	53.3
1965	94.8	60.2	34.6	55.0
1966	97.2	61.9	35.3	55.7
1967	99.9	63.3	36.6	56.9
1968	102.6	64.5	38.1	70.9
1969	105.8	66.4	39.4	73.2
1970	108.6	67.6	41.0	75.3
1971	111.0	68.7	42.4	77.0
1972	113.7	70.1	43.6	78.8
1973	116.9	71.4	45.5	81.4
1974	120.4	72.9	47.4	84.3
1975	123.9	75.1	48.8	86.3
1976	126.7	76.9	49.8	87.8
1977	129.8	79.0	50.8	89.7
1978	134.0	81.1	52.9	94.1
1979	138.1	83.7	54.3	97.8
1980	141.0	86.0	55.0	100.5
1981	143.4	88.6	54.8	102.3
1982	145.3	91.3	54.0	103.7
1983	146.9	94.5	52.4	104.7
1984	148.8	97.4	51.4	106.3
1985	151.3	100.4	50.8	108.8
1986	153.8	103.8	50.0	111.0
1987	156.1	107.8	48.3	113.1
1988	158.8	111.0	47.7	115.3
1989	161.9	114.1	47.8	117.5
1990	164.2	116.5	47.7	119.4
1991	166.1	118.9	47.2	120.7
1992	167.7	121.3	46.4	121.9
1993	169.3	123.7	45.6	123.3
1994	170.9	126.0	44.9	125.0

(Continued)

**Table 4.C1—Estimated number of insured workers, by insured status, December 31, 1940–2011
(in millions)—Continued**

Year	Fully insured for retirement benefits, survivor benefits, or both			Insured in event of disability
	Total	Permanently insured	Not permanently insured	
1995	173.3	128.5	44.8	127.0
1996	175.4	131.0	44.4	129.0
1997	177.7	133.7	44.0	131.1
1998	180.1	136.2	43.9	133.3
1999	182.8	138.7	44.2	135.6
2000	185.2	140.6	44.6	137.9
2001	187.6	142.6	45.0	139.9
2002	189.7	144.7	45.0	141.2
2003	191.5	146.8	44.7	142.3
2004	193.2	148.7	44.5	143.7
2005	195.3	150.9	44.4	145.4
2006	197.6	153.0	44.6	147.1
2007	200.1	155.3	44.8	148.7
2008	202.3	157.5	44.9	149.5
2009	204.0	159.2	44.8	150.6
2010	205.7	161.1	44.6	151.7
2011	207.4	163.1	44.3	152.6

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

NOTES: Insured workers are those who have accumulated sufficient quarters of coverage over their working lifetimes to be eligible for benefits.

Figures are subject to revision.

Totals do not necessarily equal the sum of rounded components.

... = not applicable.

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4.C OASDI: Insured Workers

Table 4.C2—Estimated number of insured workers, by insured status, sex, and age, December 31, 1970–2011, 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	108,617	4,096	14,813	12,792	10,188	9,242	9,697	10,043	9,238	7,986	6,743	5,280	3,798	4,703
1975	123,900	5,286	16,912	16,920	12,797	10,188	9,252	9,636	9,744	8,725	7,537	6,291	4,577	6,034
1980	140,981	6,505	19,158	19,258	17,067	12,880	10,289	9,224	9,452	9,315	8,252	7,006	5,341	7,235
1985	151,284	4,244	17,754	20,775	19,295	17,025	12,878	10,273	9,078	9,073	8,794	7,465	6,005	8,626
1990	164,199	4,761	16,467	20,493	21,110	19,317	17,069	12,822	10,128	8,812	8,639	8,077	6,452	10,053
1995	173,302	3,959	14,894	18,531	20,883	21,289	19,289	16,959	12,640	9,828	8,562	7,977	7,057	11,434
1996	175,386	4,204	14,626	18,553	20,379	21,460	19,791	17,474	13,391	10,227	8,540	7,943	7,032	11,764
1997	177,689	4,355	14,702	18,439	19,867	21,533	20,293	17,702	14,317	10,772	8,758	7,861	7,059	12,028
1998	180,135	4,618	15,001	18,195	19,403	21,619	20,654	18,150	15,008	11,389	8,936	7,801	7,064	12,297
1999	182,831	4,835	15,400	17,823	19,163	21,493	21,017	18,639	15,839	11,873	9,325	7,861	7,004	12,558
2000	185,245	4,901	15,890	17,424	19,165	21,170	21,333	19,139	16,692	12,308	9,534	7,892	7,014	12,784
2001	187,579	4,809	16,337	17,164	19,229	20,720	21,527	19,674	17,187	13,018	9,922	7,999	6,996	12,996
2002	189,706	4,422	16,636	17,261	19,201	20,289	21,670	20,201	17,394	13,889	10,407	8,155	6,970	13,212
2003	191,497	3,984	16,663	17,484	18,932	19,838	21,735	20,594	17,848	14,573	11,033	8,454	6,929	13,432
2004	193,160	3,710	16,558	17,827	18,534	19,576	21,638	20,955	18,353	15,363	11,364	8,677	6,989	13,614
2005	195,323	3,617	16,447	18,272	18,091	19,556	21,321	21,281	18,875	16,198	11,854	8,945	7,049	13,816
2006	197,602	3,663	16,427	18,682	17,787	19,591	20,883	21,487	19,408	16,687	12,536	9,296	7,135	14,020
2007	200,108	3,673	16,484	19,031	17,757	19,474	20,405	21,577	19,922	16,943	13,484	9,832	7,295	14,231
2008	202,315	3,559	16,544	19,278	17,959	19,184	19,967	21,628	20,324	17,387	14,196	10,367	7,563	14,359
2009	204,007	3,360	16,459	19,386	18,310	18,815	19,707	21,569	20,676	17,908	14,696	10,744	7,784	14,593
2010	205,697	3,115	16,279	19,415	18,759	18,379	19,689	21,275	21,001	18,429	15,429	11,038	8,048	14,842
2011	207,423	2,902	16,096	19,384	19,200	18,077	19,729	20,842	21,213	18,956	15,926	11,668	8,388	15,042
<i>Male</i>														
1970	63,103	2,697	8,473	7,157	5,880	5,445	5,690	5,781	5,344	4,743	3,947	3,033	2,172	2,741
1975	69,384	3,199	9,365	9,144	7,193	5,871	5,380	5,565	5,552	4,986	4,276	3,422	2,413	3,018
1980	76,707	3,667	10,225	10,197	9,226	7,172	5,819	5,261	5,373	5,254	4,590	3,758	2,752	3,413
1985	80,808	2,291	9,417	10,877	10,236	9,191	7,087	5,719	5,100	5,094	4,851	3,966	3,066	3,911
1990	86,527	2,542	8,664	10,742	11,061	10,186	9,101	6,952	5,567	4,894	4,752	4,294	3,296	4,477
1995	90,357	2,063	7,724	9,651	10,953	11,143	10,080	8,943	6,777	5,344	4,693	4,270	3,633	5,085
1996	91,219	2,164	7,567	9,636	10,679	11,220	10,327	9,168	7,148	5,531	4,655	4,254	3,623	5,248
1997	92,243	2,242	7,578	9,541	10,390	11,246	10,578	9,243	7,605	5,804	4,760	4,229	3,646	5,380
1998	93,279	2,374	7,699	9,390	10,122	11,283	10,756	9,438	7,926	6,104	4,842	4,189	3,650	5,507
1999	94,433	2,489	7,862	9,165	9,970	11,206	10,929	9,665	8,318	6,339	5,018	4,210	3,629	5,634
2000	95,606	2,519	8,138	8,956	10,006	11,039	11,077	9,901	8,726	6,545	5,100	4,203	3,646	5,748
2001	96,598	2,463	8,368	8,795	10,008	10,805	11,156	10,160	8,936	6,890	5,278	4,241	3,638	5,859
2002	97,489	2,251	8,518	8,836	9,958	10,573	11,186	10,414	9,010	7,313	5,523	4,308	3,622	5,977
2003	98,202	2,021	8,502	8,934	9,797	10,341	11,211	10,609	9,210	7,631	5,812	4,442	3,596	6,096
2004	98,902	1,861	8,459	9,098	9,565	10,207	11,163	10,785	9,448	8,003	5,957	4,537	3,621	6,200
2005	99,857	1,801	8,407	9,314	9,303	10,181	11,021	10,941	9,693	8,402	6,176	4,657	3,641	6,319
2006	100,892	1,820	8,381	9,529	9,119	10,176	10,814	11,036	9,952	8,617	6,506	4,825	3,689	6,427
2007	102,018	1,818	8,385	9,713	9,087	10,084	10,583	11,074	10,206	8,709	6,973	5,081	3,767	6,539
2008	102,981	1,765	8,400	9,834	9,174	9,906	10,366	11,100	10,409	8,906	7,283	5,322	3,896	6,619
2009	103,717	1,665	8,359	9,872	9,339	9,689	10,230	11,073	10,574	9,148	7,526	5,500	3,996	6,745
2010	104,401	1,542	8,247	9,875	9,552	9,438	10,200	10,938	10,726	9,392	7,875	5,622	4,117	6,877
2011	105,142	1,453	8,132	9,841	9,774	9,257	10,195	10,733	10,817	9,638	8,106	5,923	4,275	6,998
<i>Female</i>														
1970	45,513	1,399	6,339	5,634	4,308	3,796	4,007	4,262	3,894	3,243	2,796	2,248	1,626	1,961
1975	54,517	2,087	7,547	7,777	5,604	4,317	3,873	4,072	4,192	3,739	3,261	2,869	2,163	3,016
1980	64,275	2,838	8,933	9,061	7,840	5,708	4,471	3,963	4,079	4,061	3,662	3,248	2,589	3,822
1985	70,476	1,954	8,338	9,898	9,058	7,833	5,791	4,553	3,977	3,979	3,943	3,499	2,939	4,714
1990	77,672	2,219	7,803	9,750	10,049	9,131	7,969	5,870	4,561	3,917	3,888	3,783	3,155	5,576
1995	82,946	1,896	7,170	8,880	9,930	10,146	9,209	8,016	5,863	4,484	3,869	3,708	3,425	6,349
1996	84,167	2,041	7,059	8,917	9,700	10,240	9,465	8,307	6,242	4,696	3,885	3,689	3,409	6,516
1997	85,445	2,114	7,124	8,898	9,477	10,287	9,716	8,459	6,711	4,968	3,998	3,632	3,413	6,648
1998	86,856	2,244	7,303	8,805	9,281	10,336	9,898	8,713	7,082	5,285	4,094	3,612	3,413	6,790
1999	88,399	2,345	7,538	8,659	9,194	10,288	10,089	8,974	7,521	5,534	4,307	3,652	3,375	6,925

(Continued)

Table 4.C2—Estimated number of insured workers, by insured status, sex, and age, December 31, 1970–2011, selected years (in thousands)—Continued

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–64	65–69	70–74	75 or older
<i>Fully insured for retirement benefits, survivor benefits, or both (cont.)</i>														
<i>Female (cont.)</i>														
2000	89,640	2,382	7,752	8,468	9,159	10,130	10,256	9,238	7,967	5,763	4,434	3,689	3,368	7,036
2001	90,981	2,346	7,970	8,370	9,220	9,915	10,370	9,514	8,251	6,128	4,645	3,758	3,358	7,137
2002	92,217	2,171	8,118	8,425	9,243	9,716	10,484	9,787	8,384	6,576	4,884	3,847	3,348	7,235
2003	93,295	1,963	8,161	8,549	9,135	9,496	10,524	9,985	8,638	6,943	5,221	4,012	3,333	7,337
2004	94,257	1,849	8,100	8,729	8,970	9,369	10,475	10,169	8,905	7,361	5,407	4,140	3,369	7,415
2005	95,466	1,816	8,040	8,958	8,788	9,375	10,300	10,340	9,182	7,796	5,678	4,288	3,408	7,497
2006	96,711	1,843	8,047	9,153	8,669	9,414	10,069	10,450	9,456	8,070	6,030	4,471	3,446	7,593
2007	98,091	1,855	8,099	9,318	8,671	9,390	9,822	10,503	9,716	8,235	6,511	4,751	3,529	7,692
2008	99,334	1,794	8,143	9,445	8,785	9,278	9,601	10,527	9,915	8,480	6,913	5,045	3,667	7,740
2009	100,290	1,695	8,100	9,513	8,971	9,126	9,477	10,495	10,102	8,760	7,170	5,245	3,788	7,848
2010	101,297	1,574	8,031	9,540	9,206	8,941	9,489	10,337	10,275	9,037	7,554	5,417	3,931	7,965
2011	102,281	1,450	7,963	9,543	9,426	8,820	9,534	10,108	10,396	9,318	7,820	5,746	4,113	8,044
<i>Insured in event of disability^a</i>														
<i>Total</i>														
1970	75,344	3,954	12,790	10,053	7,368	6,832	7,446	7,828	7,190	6,500	5,383	...	...	...
1975	86,288	5,057	14,581	13,511	9,443	7,692	7,341	7,784	7,872	6,978	6,029	...	...	...
1980	100,461	6,348	17,536	16,289	13,108	9,806	8,260	7,579	7,733	7,500	6,303	...	...	...
1985	108,782	4,095	15,982	18,090	15,905	13,655	10,580	8,640	7,604	7,422	6,809	...	...	...
1990	119,405	4,576	15,178	18,157	17,833	16,091	14,162	10,833	8,570	7,310	6,695	...	...	...
1995	126,988	3,789	13,486	16,539	18,119	18,247	16,577	14,484	10,812	8,274	6,661	...	...	...
1996	128,996	4,046	13,319	16,564	17,711	18,443	17,070	14,969	11,515	8,592	6,767	...	...	...
1997	131,052	4,206	13,528	16,441	17,272	18,588	17,504	15,176	12,317	9,134	6,887	...	...	...
1998	133,273	4,470	13,830	16,282	16,898	18,639	17,887	15,599	12,896	9,676	7,097	...	...	...
1999	135,641	4,693	14,215	16,029	16,711	18,639	18,212	16,145	13,600	10,086	7,312	...	...	...
2000	137,940	4,760	14,700	15,642	16,773	18,428	18,556	16,730	14,372	10,418	7,560	...	...	...
2001	139,907	4,658	15,008	15,387	16,868	18,105	18,791	17,257	14,871	11,100	7,863	...	...	...
2002	141,176	4,226	14,989	15,451	16,756	17,699	18,957	17,711	15,103	11,900	8,385	...	...	...
2003	142,292	3,774	14,805	15,588	16,551	17,335	19,005	18,102	15,511	12,499	8,896	228	...	...
2004	143,679	3,519	14,655	15,817	16,243	17,114	18,943	18,387	16,038	13,186	9,300	478	...	...
2005	145,352	3,450	14,657	16,175	15,794	17,143	18,647	18,652	16,589	13,888	9,589	769	...	...
2006	147,083	3,508	14,803	16,526	15,445	17,148	18,233	18,786	17,042	14,326	10,207	1,060	...	...
2007	148,653	3,538	14,904	16,811	15,468	16,938	17,718	18,847	17,436	14,525	10,958	1,510	...	...
2008	149,549	3,417	14,852	17,028	15,571	16,660	17,257	18,805	17,753	14,874	11,483	1,849	...	...
2009	150,630	3,220	14,732	17,160	16,005	16,447	17,151	18,848	18,049	15,340	11,918	1,761	...	...
2010	151,666	2,978	14,505	17,224	16,473	16,135	17,220	18,656	18,331	15,827	12,541	1,775	...	...
2011	152,614	2,768	14,410	17,209	16,941	15,916	17,297	18,315	18,494	16,254	12,916	2,095	...	...
<i>Male</i>														
1970	50,159	2,603	7,759	6,591	5,380	5,003	5,236	5,248	4,682	4,200	3,457	...	...	...
1975	54,766	3,063	8,451	8,278	6,459	5,368	4,949	5,073	4,992	4,351	3,783	...	...	...
1980	60,293	3,584	9,661	9,282	8,109	6,371	5,258	4,737	4,794	4,617	3,880	...	...	...
1985	62,622	2,234	8,706	9,989	9,162	8,082	6,291	5,093	4,501	4,445	4,119	...	...	...
1990	66,638	2,453	8,186	9,843	9,946	9,123	7,958	6,103	4,862	4,217	3,947	...	...	...
1995	69,394	1,974	7,166	8,905	9,965	10,133	9,106	7,827	5,912	4,610	3,798	...	...	...
1996	70,196	2,089	7,026	8,873	9,727	10,214	9,369	8,051	6,265	4,730	3,854	...	...	...
1997	71,033	2,169	7,078	8,773	9,477	10,245	9,597	8,127	6,662	5,007	3,898	...	...	...
1998	71,950	2,306	7,189	8,616	9,243	10,273	9,768	8,340	6,933	5,298	3,984	...	...	...
1999	72,945	2,425	7,353	8,432	9,090	10,244	9,926	8,625	7,264	5,493	4,092	...	...	...

(Continued)

4.C OASDI: Insured Workers

Table 4.C2—Estimated number of insured workers, by insured status, sex, and age, December 31, 1970–2011, selected years (in thousands)—Continued

Year	Total, all ages	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–64	65–69	70–74	75 or older
<i>Insured in event of disability^a (cont.)</i>														
<i>Male (cont.)</i>														
2000	73,907	2,442	7,589	8,183	9,081	10,094	10,094	8,955	7,623	5,652	4,194	...	...	...
2001	74,709	2,381	7,726	8,024	9,073	9,908	10,190	9,231	7,856	5,993	4,327	...	...	...
2002	75,163	2,146	7,720	8,014	8,984	9,660	10,249	9,471	7,948	6,380	4,592	...	...	...
2003	75,565	1,907	7,613	8,058	8,815	9,449	10,278	9,644	8,150	6,665	4,864	122	...	...
2004	76,160	1,757	7,549	8,169	8,622	9,300	10,250	9,787	8,416	6,988	5,060	265	...	...
2005	76,912	1,708	7,538	8,344	8,358	9,296	10,086	9,926	8,723	7,310	5,196	427	...	...
2006	77,678	1,737	7,581	8,510	8,165	9,260	9,875	9,988	8,965	7,512	5,502	582	...	...
2007	78,370	1,746	7,643	8,656	8,120	9,146	9,598	10,016	9,171	7,583	5,869	824	...	...
2008	78,682	1,689	7,610	8,756	8,141	8,954	9,361	10,007	9,306	7,745	6,104	1,009	...	...
2009	78,987	1,589	7,531	8,790	8,361	8,797	9,286	10,008	9,407	7,953	6,317	947	...	...
2010	79,321	1,468	7,399	8,787	8,588	8,605	9,296	9,903	9,527	8,183	6,618	946	...	...
2011	79,569	1,380	7,323	8,747	8,807	8,458	9,303	9,732	9,585	8,374	6,756	1,104	...	...
<i>Female</i>														
1970	25,185	1,351	5,031	3,463	1,988	1,829	2,210	2,581	2,508	2,299	1,925	...	...	...
1975	31,522	1,994	6,130	5,234	2,984	2,324	2,392	2,711	2,880	2,627	2,245	...	...	...
1980	40,168	2,764	7,874	7,008	4,999	3,435	3,002	2,843	2,939	2,883	2,423	...	...	...
1985	46,161	1,861	7,276	8,101	6,743	5,574	4,290	3,548	3,103	2,977	2,689	...	...	...
1990	52,767	2,123	6,991	8,314	7,887	6,968	6,204	4,730	3,708	3,093	2,748	...	...	...
1995	57,594	1,815	6,321	7,634	8,153	8,114	7,471	6,656	4,901	3,664	2,864	...	...	...
1996	58,800	1,957	6,293	7,691	7,984	8,229	7,702	6,919	5,250	3,862	2,914	...	...	...
1997	60,020	2,037	6,450	7,668	7,795	8,343	7,906	7,049	5,655	4,127	2,989	...	...	...
1998	61,323	2,164	6,641	7,666	7,655	8,366	8,119	7,259	5,963	4,378	3,113	...	...	...
1999	62,696	2,267	6,862	7,597	7,621	8,395	8,286	7,520	6,336	4,593	3,220	...	...	...
2000	64,033	2,318	7,111	7,459	7,693	8,334	8,462	7,774	6,749	4,766	3,366	...	...	...
2001	65,198	2,277	7,282	7,364	7,794	8,197	8,601	8,026	7,015	5,107	3,536	...	...	...
2002	66,014	2,080	7,269	7,437	7,772	8,040	8,708	8,240	7,155	5,520	3,792	...	...	...
2003	66,726	1,866	7,192	7,530	7,736	7,886	8,727	8,457	7,360	5,834	4,032	106	...	...
2004	67,518	1,762	7,106	7,648	7,621	7,814	8,693	8,600	7,623	6,198	4,240	213	...	...
2005	68,440	1,742	7,119	7,830	7,436	7,847	8,560	8,726	7,866	6,578	4,393	342	...	...
2006	69,406	1,771	7,222	8,016	7,280	7,888	8,358	8,798	8,077	6,814	4,704	478	...	...
2007	70,283	1,792	7,262	8,155	7,348	7,793	8,120	8,831	8,265	6,943	5,089	686	...	...
2008	70,867	1,729	7,243	8,272	7,429	7,706	7,896	8,798	8,447	7,129	5,379	840	...	...
2009	71,643	1,630	7,200	8,370	7,644	7,650	7,866	8,840	8,642	7,386	5,600	814	...	...
2010	72,345	1,510	7,106	8,437	7,885	7,530	7,924	8,754	8,805	7,644	5,923	828	...	...
2011	73,045	1,388	7,087	8,462	8,134	7,457	7,994	8,583	8,909	7,880	6,160	991	...	...

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

NOTES: Insured workers are those who have accumulated sufficient quarters of coverage over their working lifetimes to be eligible for benefits.

Figures are subject to revision.

Totals do not necessarily equal the sum of rounded components.

... = not applicable.

a. Figures exclude people at or above normal (or full) retirement age because they are not eligible to receive disability benefits.

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Table 4.C5—Estimated size of the population in the Social Security area and percentage fully insured, by sex and age, 2007–2011 (in thousands)

Age at end of year	2007		2008		2009		2010		2011	
	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured	Population	Percentage fully insured
Total										
Total	308,436	^a 88	311,333	^a 88	313,778	^a 88	316,300	^a 88	318,896	^a 88
Under 15	62,895	^b	63,115	^b	63,262	^b	63,573	^b	63,959	^b
15–19	22,091	16	22,093	16	21,933	15	21,687	14	21,458	13
20–24	21,602	76	21,799	76	22,052	75	22,297	73	22,515	71
25–29	21,440	89	21,797	88	21,915	88	21,975	88	22,041	88
30–34	19,803	90	20,125	89	20,481	89	20,934	90	21,391	90
35–39	21,315	91	21,126	91	20,771	91	20,338	90	20,044	90
40–44	22,016	93	21,613	92	21,385	92	21,416	92	21,503	92
45–49	23,186	93	23,224	93	23,145	93	22,844	93	22,414	93
50–54	21,564	92	21,980	92	22,324	93	22,634	93	22,816	93
55–59	18,610	91	19,027	91	19,535	92	20,047	92	20,566	92
60–64	15,018	90	15,700	90	16,460	89	17,284	89	17,740	90
65–69	11,409	86	11,915	87	12,335	87	12,687	87	13,357	87
70–74	8,969	81	9,175	82	9,396	83	9,639	83	9,968	84
75 or older	18,516	77	18,647	77	18,784	78	18,944	78	19,123	79
Male										
Subtotal	152,710	^a 92	154,248	^a 91	155,468	^a 91	156,728	^a 91	158,029	^a 91
Under 15	32,154	^b	32,264	^b	32,338	^b	32,495	^b	32,694	^b
15–19	11,335	16	11,325	15	11,227	15	11,090	14	10,965	13
20–24	11,138	75	11,236	75	11,342	74	11,443	72	11,529	71
25–29	10,998	88	11,199	88	11,261	88	11,290	87	11,314	87
30–34	10,090	90	10,267	89	10,444	89	10,667	90	10,898	90
35–39	10,789	93	10,703	93	10,525	92	10,310	92	10,165	91
40–44	11,061	96	10,877	95	10,773	95	10,795	94	10,843	94
45–49	11,535	96	11,563	96	11,535	96	11,398	96	11,198	96
50–54	10,631	96	10,843	96	11,015	96	11,173	96	11,268	96
55–59	9,074	96	9,280	96	9,530	96	9,784	96	10,039	96
60–64	7,223	97	7,557	96	7,928	95	8,329	95	8,549	95
65–69	5,371	95	5,614	95	5,816	95	5,986	94	6,314	94
70–74	4,102	92	4,208	93	4,318	93	4,436	93	4,593	93
75 or older	7,208	91	7,312	91	7,416	91	7,532	91	7,659	91
Female										
Subtotal	155,726	^a 84	157,085	^a 84	158,310	^a 85	159,572	^a 85	160,867	^a 85
Under 15	30,741	^b	30,851	^b	30,925	^b	31,078	^b	31,265	^b
15–19	10,756	17	10,767	17	10,706	16	10,597	15	10,493	14
20–24	10,465	77	10,563	77	10,709	76	10,855	74	10,986	72
25–29	10,442	89	10,597	89	10,654	89	10,685	89	10,728	89
30–34	9,714	89	9,858	89	10,037	89	10,267	90	10,493	90
35–39	10,526	89	10,423	89	10,246	89	10,028	89	9,879	89
40–44	10,955	90	10,736	89	10,612	89	10,621	89	10,660	89
45–49	11,651	90	11,661	90	11,611	90	11,446	90	11,216	90
50–54	10,932	89	11,137	89	11,309	89	11,461	90	11,548	90
55–59	9,536	86	9,747	87	10,005	88	10,264	88	10,527	89
60–64	7,795	84	8,142	85	8,532	84	8,955	84	9,191	85
65–69	6,038	79	6,301	80	6,519	80	6,701	81	7,043	82
70–74	4,867	72	4,967	74	5,078	75	5,203	76	5,374	77
75 or older	11,308	68	11,335	68	11,368	69	11,411	70	11,463	70

SOURCE: Census Bureau.

NOTES: Population in the Social Security area includes residents of the 50 states and the District of Columbia adjusted for net census undercount; civilian residents of American Samoa, Guam, Northern Mariana Islands, Puerto Rico, and U.S. Virgin Islands; federal civilian employees and persons in the armed forces abroad and their dependents; crew members of merchant vessels; and all other U.S. citizens abroad.

Totals do not necessarily equal the sum of rounded components.

Population estimates are subject to revision.

a. Percentage of population aged 20 or older and fully insured.

b. Less than 0.5 percent.

CONTACT: Felicitie Bell (410) 965-3020, Michael Morris (410) 965-3045, or statistics@ssa.gov.

4.C OASDI: Insured Workers

Table 4.C6—Period life table, 2007

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	.007379	100,000	75.38	.006096	100,000	80.43	60	.011407	85,227	20.92	.006961	91,220	23.97
1	.000494	99,262	74.94	.000434	99,390	79.92	61	.012315	84,254	20.16	.007624	90,585	23.14
2	.000317	99,213	73.98	.000256	99,347	78.95	62	.013289	83,217	19.40	.008322	89,895	22.31
3	.000241	99,182	73.00	.000192	99,322	77.97	63	.014326	82,111	18.66	.009046	89,147	21.49
4	.000200	99,158	72.02	.000148	99,303	76.99	64	.015453	80,935	17.92	.009822	88,340	20.69
5	.000179	99,138	71.03	.000136	99,288	76.00	65	.016723	79,684	17.19	.010698	87,473	19.89
6	.000166	99,120	70.04	.000128	99,275	75.01	66	.018154	78,351	16.48	.011702	86,537	19.10
7	.000152	99,104	69.05	.000122	99,262	74.02	67	.019732	76,929	15.77	.012832	85,524	18.32
8	.000133	99,089	68.06	.000115	99,250	73.03	68	.021468	75,411	15.08	.014103	84,427	17.55
9	.000108	99,075	67.07	.000106	99,238	72.04	69	.023387	73,792	14.40	.015526	83,236	16.79
10	.000089	99,065	66.08	.000100	99,228	71.04	70	.025579	72,066	13.73	.017163	81,944	16.05
11	.000094	99,056	65.09	.000102	99,218	70.05	71	.028032	70,223	13.08	.018987	80,537	15.32
12	.000145	99,047	64.09	.000120	99,208	69.06	72	.030665	68,254	12.44	.020922	79,008	14.61
13	.000252	99,032	63.10	.000157	99,196	68.07	73	.033467	66,161	11.82	.022951	77,355	13.91
14	.000401	99,007	62.12	.000209	99,180	67.08	74	.036519	63,947	11.21	.025147	75,580	13.22
15	.000563	98,968	61.14	.000267	99,160	66.09	75	.040010	61,612	10.62	.027709	73,679	12.55
16	.000719	98,912	60.18	.000323	99,133	65.11	76	.043987	59,147	10.04	.030659	71,638	11.90
17	.000873	98,841	59.22	.000369	99,101	64.13	77	.048359	56,545	9.48	.033861	69,441	11.26
18	.001017	98,754	58.27	.000401	99,064	63.15	78	.053140	53,811	8.94	.037311	67,090	10.63
19	.001148	98,654	57.33	.000422	99,025	62.18	79	.058434	50,951	8.41	.041132	64,587	10.03
20	.001285	98,541	56.40	.000441	98,983	61.20	80	.064457	47,974	7.90	.045561	61,930	9.43
21	.001412	98,414	55.47	.000463	98,939	60.23	81	.071259	44,882	7.41	.050698	59,109	8.86
22	.001493	98,275	54.54	.000483	98,894	59.26	82	.078741	41,683	6.94	.056486	56,112	8.31
23	.001513	98,128	53.63	.000499	98,846	58.29	83	.086923	38,401	6.49	.062971	52,942	7.77
24	.001487	97,980	52.71	.000513	98,796	57.32	84	.095935	35,063	6.06	.070259	49,608	7.26
25	.001446	97,834	51.78	.000528	98,746	56.35	85	.105937	31,699	5.65	.078471	46,123	6.77
26	.001412	97,693	50.86	.000544	98,694	55.38	86	.117063	28,341	5.26	.087713	42,504	6.31
27	.001389	97,555	49.93	.000563	98,640	54.40	87	.129407	25,024	4.89	.098064	38,776	5.87
28	.001388	97,419	49.00	.000585	98,584	53.44	88	.143015	21,785	4.55	.109578	34,973	5.45
29	.001405	97,284	48.07	.000612	98,527	52.47	89	.157889	18,670	4.22	.122283	31,141	5.06
30	.001428	97,147	47.13	.000642	98,466	51.50	90	.174013	15,722	3.92	.136190	27,333	4.69
31	.001453	97,009	46.20	.000678	98,403	50.53	91	.191354	12,986	3.64	.151300	23,610	4.36
32	.001487	96,868	45.27	.000721	98,336	49.56	92	.209867	10,501	3.38	.167602	20,038	4.04
33	.001529	96,724	44.33	.000771	98,266	48.60	93	.229502	8,297	3.15	.185078	16,680	3.76
34	.001584	96,576	43.40	.000830	98,190	47.64	94	.250198	6,393	2.93	.203700	13,593	3.50
35	.001651	96,423	42.47	.000896	98,108	46.68	95	.270750	4,794	2.75	.222541	10,824	3.26
36	.001737	96,264	41.54	.000971	98,020	45.72	96	.290814	3,496	2.58	.241317	8,415	3.05
37	.001845	96,096	40.61	.001056	97,925	44.76	97	.310029	2,479	2.44	.259716	6,384	2.87
38	.001979	95,919	39.68	.001153	97,822	43.81	98	.328021	1,711	2.30	.277409	4,726	2.70
39	.002140	95,729	38.76	.001260	97,709	42.86	99	.344422	1,149	2.19	.294054	3,415	2.54
40	.002323	95,525	37.84	.001377	97,586	41.91	100	.361644	754	2.07	.311697	2,411	2.39
41	.002526	95,303	36.93	.001506	97,452	40.97	101	.379726	481	1.96	.330399	1,659	2.25
42	.002750	95,062	36.02	.001650	97,305	40.03	102	.398712	298	1.85	.350223	1,111	2.11
43	.002993	94,800	35.12	.001810	97,144	39.10	103	.418648	179	1.75	.371236	722	1.98
44	.003257	94,517	34.22	.001985	96,968	38.17	104	.439580	104	1.66	.393510	454	1.86
45	.003543	94,209	33.33	.002174	96,776	37.24	105	.461559	58	1.56	.417121	275	1.74
46	.003856	93,875	32.45	.002375	96,566	36.32	106	.484637	31	1.47	.442148	160	1.62
47	.004208	93,513	31.57	.002582	96,336	35.41	107	.508869	16	1.39	.468677	90	1.52
48	.004603	93,120	30.71	.002794	96,087	34.50	108	.534312	8	1.30	.496798	48	1.41
49	.005037	92,691	29.84	.003012	95,819	33.59	109	.561028	4	1.22	.526605	24	1.31

(Continued)

Table 4.C6—Period life table, 2007—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	.005512	92,224	28.99	.003255	95,530	32.69	110	.589079	2	1.15	.558202	11	1.22
51	.006008	91,716	28.15	.003517	95,219	31.80	111	.618533	1	1.07	.591694	5	1.13
52	.006500	91,165	27.32	.003782	94,885	30.91	112	.649460	0	1.00	.627196	2	1.05
53	.006977	90,572	26.49	.004045	94,526	30.02	113	.681933	0	0.94	.664827	1	0.97
54	.007456	89,940	25.68	.004318	94,143	29.14	114	.716029	0	0.87	.704717	0	0.89
55	.007975	89,270	24.87	.004619	93,737	28.27	115	.751831	0	0.81	.747000	0	0.82
56	.008551	88,558	24.06	.004965	93,304	27.40	116	.789422	0	0.75	.789422	0	0.75
57	.009174	87,800	23.26	.005366	92,841	26.53	117	.828894	0	0.70	.828894	0	0.70
58	.009848	86,995	22.48	.005830	92,342	25.67	118	.870338	0	0.64	.870338	0	0.64
59	.010584	86,138	21.69	.006358	91,804	24.82	119	.913855	0	0.59	.913855	0	0.59

SOURCES: National Center for Health Statistics and Census Bureau.

NOTE: The period life expectancy at a given age for 2007 represents the average number of years of life remaining if a group of persons at that age were to experience the mortality rates for 2007 over the course of their remaining lives.

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

CONTACT: Felicitie Bell (410) 965-3020, Michael Morris (410) 965-3045, or statistics@ssa.gov.

A vertical strip on the left side of the page shows a close-up of the stars and stripes of the American flag. The stars are white and set against a dark background, while the stripes are horizontal and also in shades of gray.

Old-Age, Survivors, and Disability Insurance

Benefits in Current-Payment Status

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5.A OASDI Current-Pay Benefits: Summary

Table 5.A1—Number and average monthly benefit, by type of benefit and sex, December 2010

Type of benefit	All		Male		Female	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Total, OASDI	54,031,968	1,074.30	24,293,682	1,223.60	29,738,286	952.40
OASI	43,847,811	1,109.80	19,038,691	1,275.90	24,809,120	982.40
Retirement benefits	37,489,475	1,129.40	17,946,596	1,307.20	19,542,879	966.10
Retired workers	34,593,080	1,175.50	17,582,235	1,323.10	17,010,845	1,022.90
Spouses of retired workers	2,316,536	580.00	57,004	366.00	2,259,532	585.40
Children of retired workers	579,859	576.70	307,357	573.80	272,502	580.00
Survivor benefits	6,358,336	994.40	1,092,095	761.20	5,266,241	1,042.70
Children of deceased workers	1,912,789	751.80	1,002,255	750.60	910,534	753.00
Widowed mothers and fathers	158,061	848.90	11,891	729.90	146,170	858.60
Nondisabled widow(er)s	4,040,960	1,133.90	65,538	977.90	3,975,422	1,136.40
Disabled widow(er)s	244,953	681.30	12,220	498.70	232,733	690.90
Parents of deceased workers	1,573	998.20	191	916.80	1,382	1,009.40
DI	10,184,157	921.60	5,254,991	1,034.20	4,929,166	801.50
Disabled workers	8,203,951	1,067.80	4,309,685	1,191.10	3,894,266	931.30
Spouses of disabled workers	160,300	286.50	6,612	241.70	153,688	288.40
Children of disabled workers	1,819,906	318.40	938,694	319.60	881,212	317.10

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

NOTE: Beginning with this year's edition we have removed the race breakdown because the quality of the data has become too inconsistent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.1—Number and average monthly benefit for retired workers, by age and sex, December 2010

Age	All retired workers		Men		Women	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Total	34,593,080	1,175.50	17,582,235	1,323.10	17,010,845	1,022.90
62–64	3,432,082	1,035.00	1,697,581	1,193.70	1,734,501	879.70
62	897,043	1,013.90	437,796	1,168.10	459,247	866.80
63	1,270,808	1,021.20	628,522	1,177.30	642,286	868.40
64	1,264,231	1,063.90	631,263	1,227.80	632,968	900.40
65–69	9,360,092	1,224.50	4,929,924	1,405.40	4,430,168	1,023.10
65	1,223,544	1,080.10	614,556	1,242.40	608,988	916.20
66	2,036,656	1,224.00	1,077,331	1,403.00	959,325	1,023.00
67	2,161,043	1,241.40	1,146,165	1,422.70	1,014,878	1,036.60
68	2,086,522	1,256.00	1,108,580	1,440.40	977,942	1,047.00
69	1,852,327	1,265.10	983,292	1,450.60	869,035	1,055.40
70–74	7,765,705	1,218.60	4,100,481	1,383.80	3,665,224	1,033.80
70	1,735,164	1,262.00	916,607	1,442.50	818,557	1,059.80
71	1,625,639	1,236.00	858,019	1,408.00	767,620	1,043.80
72	1,578,023	1,221.50	832,926	1,389.00	745,097	1,034.30
73	1,462,719	1,200.40	772,809	1,358.50	689,910	1,023.40
74	1,364,160	1,158.80	720,120	1,301.30	644,040	999.50
75–79	5,749,083	1,142.00	3,011,115	1,268.90	2,737,968	1,002.50
75	1,300,731	1,138.40	685,173	1,271.10	615,558	990.70
76	1,218,655	1,134.50	641,839	1,261.20	576,816	993.50
77	1,111,929	1,139.10	582,694	1,264.70	529,235	1,000.80
78	1,090,818	1,155.00	567,992	1,283.80	522,826	1,015.20
79	1,026,950	1,144.80	533,417	1,263.90	493,533	1,016.00
80–84	4,290,180	1,151.30	2,150,633	1,260.70	2,139,547	1,041.40
80	993,392	1,142.20	513,109	1,257.00	480,283	1,019.60
81	903,896	1,141.20	460,227	1,250.30	443,669	1,028.00
82	860,640	1,156.60	430,377	1,269.50	430,263	1,043.60
83	804,430	1,165.30	395,644	1,275.90	408,786	1,058.40
84	727,822	1,154.60	351,276	1,251.80	376,546	1,064.00
85–89	2,636,274	1,153.20	1,195,596	1,227.80	1,440,678	1,091.40
85	661,640	1,168.40	310,618	1,267.60	351,022	1,080.70
86	602,295	1,153.00	277,358	1,236.60	324,937	1,081.60
87	521,475	1,144.70	236,531	1,212.70	284,944	1,088.30
88	451,759	1,145.70	199,220	1,202.20	252,539	1,101.10
89	399,105	1,148.10	171,869	1,192.00	227,236	1,114.90
90–94	1,063,180	1,199.30	411,420	1,251.00	651,760	1,166.70
95 or older	296,484	1,232.80	85,485	1,382.40	210,999	1,172.20

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

NOTE: Beginning with this year's edition we have removed the race breakdown because the quality of the data has become too inconsistent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.2—Number and average monthly benefit for disabled workers, by age and sex, December 2010

Age	All disabled workers		Men		Women	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Total	8,203,951	1,067.80	4,309,685	1,191.10	3,894,266	931.30
Under 20	1,119	410.10	665	414.70	454	403.40
20–24	55,857	563.90	33,206	579.50	22,651	541.10
20	2,796	449.20	1,681	456.50	1,115	438.20
21	6,202	492.90	3,670	502.60	2,532	478.90
22	10,545	532.30	6,290	544.40	4,255	514.30
23	15,658	573.30	9,285	588.70	6,373	550.80
24	20,656	609.90	12,280	630.40	8,376	579.80
25–29	176,891	691.60	100,188	709.80	76,703	667.80
25	25,936	640.40	15,070	661.20	10,866	611.70
26	30,612	662.80	17,732	680.40	12,880	638.50
27	35,117	685.00	20,182	703.00	14,935	660.60
28	40,212	707.80	22,500	728.50	17,712	681.60
29	45,014	731.20	24,704	749.00	20,310	709.60
30–34	282,951	787.20	147,694	808.40	135,257	764.10
30	49,971	752.10	26,850	768.20	23,121	733.30
31	54,391	770.30	28,683	791.20	25,708	746.90
32	56,602	785.50	29,759	807.10	26,843	761.50
33	60,029	802.90	30,736	826.50	29,293	778.10
34	61,958	816.80	31,666	841.60	30,292	790.90
35–39	393,707	858.70	197,445	893.60	196,262	823.70
35	65,418	829.40	33,165	856.30	32,253	801.70
36	70,512	847.00	35,275	878.40	35,237	815.70
37	75,836	855.10	37,888	889.40	37,948	820.90
38	84,591	867.70	42,329	906.00	42,262	829.30
39	97,350	882.00	48,788	922.30	48,562	841.40
40–44	615,799	920.60	314,907	971.40	300,892	867.40
40	108,421	899.20	54,607	942.90	53,814	854.80
41	113,495	909.40	57,838	956.00	55,657	861.00
42	120,163	920.00	61,621	969.70	58,542	867.70
43	130,142	927.40	66,706	981.20	63,436	870.90
44	143,578	939.70	74,135	996.80	69,443	878.80
45–49	986,803	976.60	506,533	1,049.10	480,270	900.10
45	161,541	949.70	82,711	1,010.90	78,830	885.50
46	184,926	961.70	94,930	1,027.50	89,996	892.30
47	197,072	972.80	101,105	1,044.40	95,967	897.50
48	212,183	985.30	108,813	1,062.20	103,370	904.40
49	231,081	1,002.40	118,974	1,084.80	112,107	914.90
50–54	1,437,766	1,052.70	745,740	1,159.50	692,026	937.60
50	248,874	1,017.20	128,790	1,106.40	120,084	921.60
51	271,949	1,035.10	141,031	1,133.80	130,918	928.70
52	287,256	1,052.30	149,481	1,158.30	137,775	937.30
53	307,978	1,066.20	159,895	1,180.10	148,083	943.20
54	321,709	1,082.50	166,543	1,203.70	155,166	952.40
55–59	1,823,237	1,136.60	953,061	1,282.00	870,176	977.30
55	335,075	1,101.40	173,789	1,230.40	161,286	962.40
56	356,039	1,120.50	185,574	1,256.50	170,465	972.50
57	364,727	1,136.20	190,298	1,281.90	174,429	977.10
58	378,178	1,151.70	197,849	1,304.70	180,329	983.90
59	389,218	1,167.40	205,551	1,327.00	183,667	988.80
60–65	2,429,821	1,205.20	1,310,246	1,391.30	1,119,575	987.40
60	395,304	1,181.40	210,942	1,346.70	184,362	992.20
61	416,513	1,194.40	224,083	1,366.50	192,430	994.00
62	430,764	1,210.70	232,459	1,393.60	198,305	996.40
63	446,177	1,220.60	241,933	1,413.40	204,244	992.10
64	401,844	1,218.00	216,896	1,419.30	184,948	981.90
65	339,219	1,203.70	183,933	1,407.50	155,286	962.40

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

NOTE: Beginning with this year's edition we have removed the race breakdown because the quality of the data has become too inconsistent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 sex, December 2010

Basis of entitlement and age	All spouses		Wives		Husbands	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>All spouses</i>						
Total	2,476,836	561.00	2,413,220	566.50	63,616	353.10
By basis of entitlement						
Care of children	117,325	328.70	115,303	331.10	2,022	191.60
Under 35	16,356	183.20	16,102	183.80	254	142.40
35–39	16,286	218.60	16,005	219.90	281	146.10
40–44	20,131	275.80	19,748	277.80	383	172.80
45–49	21,965	334.70	21,522	337.80	443	183.60
50–54	18,289	395.10	17,950	398.70	339	205.50
55–59	11,971	448.10	11,791	451.30	180	236.20
60–61	4,321	511.20	4,242	514.00	79	359.40
62–FRA	8,006	537.80	7,943	539.20	63	350.10
Age	2,359,511	572.60	2,297,917	578.30	61,594	358.40
62–64	253,474	473.60	249,766	476.50	3,708	282.80
62	60,079	454.90	59,292	457.30	787	272.30
63	92,690	469.20	91,326	472.10	1,364	275.70
64	100,705	488.90	99,148	492.00	1,557	294.40
65–69	631,765	597.30	614,454	601.80	17,311	436.70
65	110,131	521.10	108,079	524.90	2,052	319.80
66	129,842	620.70	125,829	624.60	4,013	497.50
67	135,374	620.20	131,196	625.00	4,178	471.20
68	133,093	611.10	129,390	616.10	3,703	435.70
69	123,325	600.70	119,960	606.50	3,365	393.60
70–74	558,338	583.60	542,650	590.40	15,688	347.70
70	118,476	589.40	115,269	595.70	3,207	362.00
71	114,037	585.10	110,792	591.90	3,245	350.30
72	112,887	583.60	109,736	590.50	3,151	341.90
73	109,121	581.80	106,052	588.70	3,069	344.80
74	103,817	577.00	100,801	584.20	3,016	338.70
75–79	452,429	575.30	439,928	582.20	12,501	330.40
75	100,770	576.80	97,886	583.90	2,884	336.90
76	95,560	576.10	92,886	583.10	2,674	332.40
77	88,137	574.40	85,728	581.20	2,409	333.70
78	86,371	572.80	83,996	579.90	2,375	323.80
79	81,591	575.90	79,432	582.80	2,159	322.60
80–84	303,536	575.20	295,617	582.20	7,919	315.70
85–89	130,868	574.20	127,485	581.30	3,383	305.70
90–94	26,593	608.10	25,690	618.10	903	323.60
95 or older	2,508	634.70	2,327	659.10	181	320.40
By marital status						
Nondivorced	2,320,993	559.50	2,263,092	565.00	57,901	346.10
Divorced	155,843	583.20	150,128	589.30	5,715	424.00

(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 sex, December 2010—Continued

Basis of entitlement and age	All spouses		Wives		Husbands	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
<i>Spouses of retired workers</i>						
Total	2,316,536	580.00	2,259,532	585.40	57,004	366.00
By basis of entitlement						
Care of children	43,194	509.00	43,102	509.10	92	458.20
Under 35	1,503	429.50	1,503	429.50	0	0
35–39	2,479	431.10	2,479	431.10	0	0
40–44	4,754	462.30	4,754	462.30	0	0
45–49	7,863	482.60	7,859	482.60	4	481.30
50–54	8,968	514.10	8,956	514.40	12	323.80
55–59	7,500	524.70	7,476	525.00	24	425.30
60–61	3,246	561.10	3,219	561.40	27	524.30
62–FRA	6,881	568.30	6,856	568.60	25	479.20
Age	2,273,342	581.40	2,216,430	586.90	56,912	365.90
62–64	205,224	507.80	202,810	510.10	2,414	317.40
62	44,257	501.70	43,805	503.60	452	317.40
63	74,114	504.30	73,265	506.50	849	312.00
64	86,853	514.00	85,740	516.50	1,113	321.50
65–69	602,379	609.30	587,298	613.20	15,081	458.10
65	100,454	537.70	98,894	540.90	1,560	337.40
66	122,264	637.40	118,808	640.50	3,456	529.80
67	129,806	631.80	126,134	635.80	3,672	494.50
68	129,241	618.80	125,912	623.20	3,329	451.70
69	120,614	606.10	117,550	611.40	3,064	401.90
70–74	551,866	586.10	536,946	592.60	14,920	351.90
70	116,386	593.50	113,395	599.40	2,991	369.10
71	112,492	588.00	109,419	594.50	3,073	353.80
72	111,710	585.90	108,714	592.50	2,996	347.30
73	108,188	583.60	105,245	590.20	2,943	347.60
74	103,090	578.40	100,173	585.40	2,917	341.10
75–79	450,803	575.90	438,578	582.80	12,225	331.10
75	100,204	577.90	97,407	584.80	2,797	337.40
76	95,184	576.90	92,582	583.70	2,602	334.10
77	87,860	574.90	85,492	581.60	2,368	333.90
78	86,135	573.40	83,800	580.30	2,335	325.00
79	81,420	576.30	79,297	583.10	2,123	322.70
80–84	303,184	575.50	295,356	582.40	7,828	316.10
85–89	130,794	574.20	127,431	581.30	3,363	305.80
90–94	26,587	608.10	25,686	618.10	901	323.00
95 or older	2,505	635.00	2,325	659.40	180	319.30
By marital status						
Nondivorced	2,170,726	578.60	2,118,602	584.00	52,124	358.20
Divorced	145,810	601.10	140,930	606.40	4,880	449.80

(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 sex, December 2010—Continued

Basis of entitlement and age	All spouses		Wives		Husbands	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Spouses of disabled workers						
Total	160,300	286.50	153,688	288.40	6,612	241.70
By basis of entitlement						
Care of children	74,131	223.70	72,201	224.80	1,930	178.90
Under 35	14,853	158.20	14,599	158.50	254	142.40
35–39	13,807	180.50	13,526	181.20	281	146.10
40–44	15,377	218.20	14,994	219.30	383	172.80
45–49	14,102	252.20	13,663	254.40	439	180.90
50–54	9,321	280.60	8,994	283.50	327	201.10
55–59	4,471	319.60	4,315	323.60	156	207.10
60–61	1,075	360.50	1,023	364.90	52	273.80
62–FRA	1,125	350.80	1,087	353.80	38	265.20
Age						
62–64	48,250	328.30	46,956	331.30	1,294	218.30
62	15,822	324.10	15,487	326.50	335	211.60
63	18,576	329.20	18,061	332.40	515	215.80
64	13,852	331.90	13,408	335.40	444	226.40
65–69	29,386	351.60	27,156	356.50	2,230	291.90
65	9,677	347.80	9,185	352.30	492	263.70
66	7,578	351.60	7,021	355.90	557	297.50
67	5,568	350.90	5,062	355.80	506	301.90
68	3,852	354.00	3,478	360.60	374	293.00
69	2,711	362.60	2,410	369.20	301	309.40
70–74	6,472	368.80	5,704	382.50	768	266.60
70	2,090	363.80	1,874	375.30	216	263.30
71	1,545	374.70	1,373	385.60	172	287.50
72	1,177	360.40	1,022	378.90	155	238.10
73	933	375.00	807	390.00	126	278.70
74	727	376.20	628	393.40	99	267.00
75 or older	2,061	382.20	1,671	402.80	390	294.20
By marital status						
Nondivorced	150,267	284.10	144,490	286.00	5,777	237.10
Divorced	10,033	322.60	9,198	327.10	835	273.50

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

NOTES: FRA = full retirement age.

Beginning with this year's edition we have removed the race breakdown because the quality of the data has become too inconsistent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.4—Number and average monthly benefit for children, by age and type of benefit, December 2010

Age	All children		Children of retired workers		Children of deceased workers		Children of disabled workers	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Total	4,312,554	545.30	579,859	576.70	1,912,789	751.80	1,819,906	318.40
Under age 18	3,208,791	501.50	309,512	563.40	1,239,083	747.00	1,660,196	306.80
Under 1	12,751	325.70	617	526.60	1,879	675.80	10,255	249.50
1	30,420	343.20	1,477	511.80	6,517	662.00	22,426	239.50
2	44,255	366.10	2,332	499.60	11,841	656.10	30,082	241.70
3	60,023	383.20	3,367	504.00	18,044	665.00	38,612	241.00
4	75,016	397.30	4,514	507.50	24,263	667.40	46,239	244.80
5	89,583	410.30	5,774	519.90	30,489	672.60	53,320	248.50
6	106,217	421.60	7,211	509.40	37,770	680.20	61,236	251.70
7	124,378	434.70	8,906	515.20	44,969	695.70	70,503	258.10
8	143,443	444.00	10,640	515.40	53,168	702.50	79,635	261.80
9	167,499	453.40	13,074	519.70	63,011	710.80	91,414	266.60
10	192,856	465.80	15,935	526.60	73,890	720.50	103,031	273.80
11	215,765	479.90	18,737	530.10	84,085	732.30	112,943	283.70
12	244,048	491.20	22,382	534.30	95,919	740.80	125,747	293.20
13	269,457	507.20	26,847	545.30	106,735	753.30	135,875	306.40
14	299,845	523.30	31,775	554.00	119,883	764.00	148,187	322.00
15	332,928	542.10	37,431	569.00	135,587	772.60	159,910	340.40
16	377,118	571.20	45,099	609.80	154,802	789.30	177,217	370.90
17	423,189	585.30	53,394	623.30	176,231	792.20	193,564	386.40
Disabled adult children	949,200	678.80	250,262	587.20	601,420	755.10	97,518	443.00
18–19	17,911	560.20	2,836	582.80	7,156	757.10	7,919	374.20
20–24	89,369	587.10	16,433	592.10	38,571	745.60	34,365	406.80
25–29	92,143	626.00	23,013	591.70	43,641	746.80	25,489	450.10
30–34	87,300	653.30	29,365	595.80	42,202	757.60	15,733	480.60
35–39	95,704	674.60	39,064	597.70	47,200	771.50	9,440	508.30
40–44	113,136	688.10	47,937	594.60	61,250	771.20	3,949	533.70
45–49	127,123	705.00	45,806	587.70	80,713	773.20	604	500.10
50–54	111,301	719.60	28,005	567.90	83,280	770.60	16	496.50
55–59	81,686	730.50	12,176	551.60	69,507	761.80	3	659.30
60–64	55,997	731.20	4,319	540.50	51,678	747.20	0	0
65–69	33,902	740.70	1,026	550.30	32,876	746.70	0	0
70–74	20,380	710.80	194	552.10	20,186	712.30	0	0
75–79	12,486	656.80	60	520.50	12,426	657.40	0	0
80 or older	10,762	607.70	28	533.00	10,734	607.90	0	0
Students, aged 18–19	154,563	635.20	20,085	651.00	72,286	805.40	62,192	432.20
18	143,495	636.30	18,826	653.80	66,390	809.90	58,279	432.70
19	11,068	621.10	1,259	609.40	5,896	754.20	3,913	424.30

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

NOTE: Beginning with this year's edition we have removed the race breakdown because the quality of the data has become too inconsistent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.5—Number and average monthly benefit for widowed mothers and fathers, by age, marital status, and sex, December 2010

Age and marital status	All widowed mothers and fathers		Men		Women	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Total	158,061	848.90	11,891	729.90	146,170	858.60
By age						
Under 25	1,690	622.10	32	471.80	1,658	625.00
25–29	8,052	670.10	326	545.50	7,726	675.40
25	933	650.90	30	564.00	903	653.80
26	1,253	667.60	51	550.30	1,202	672.60
27	1,576	656.00	65	493.50	1,511	663.00
28	1,991	679.70	76	546.00	1,915	685.10
29	2,299	680.60	104	569.90	2,195	685.80
30–34	17,509	703.20	969	610.80	16,540	708.60
30	2,816	690.50	152	606.40	2,664	695.30
31	3,166	701.30	169	591.10	2,997	707.50
32	3,499	695.30	187	608.10	3,312	700.20
33	3,980	708.30	237	615.70	3,743	714.20
34	4,048	715.30	224	625.80	3,824	720.60
35–39	25,974	770.50	1,694	661.60	24,280	778.10
35	4,518	735.30	285	625.00	4,233	742.70
36	4,768	746.10	319	648.20	4,449	753.10
37	5,187	761.00	308	636.60	4,879	768.90
38	5,466	791.20	350	669.40	5,116	799.60
39	6,035	805.50	432	707.30	5,603	813.00
40–44	31,234	854.40	2,292	715.50	28,942	865.40
40	6,348	826.00	439	703.40	5,909	835.10
41	6,223	838.70	466	698.50	5,757	850.10
42	5,992	857.60	435	715.50	5,557	868.70
43	6,383	867.90	492	720.00	5,891	880.20
44	6,288	881.60	460	739.50	5,828	892.80
45–49	32,107	918.60	2,760	756.50	29,347	933.80
45	6,688	887.40	561	714.20	6,127	903.20
46	6,787	914.00	559	746.90	6,228	929.00
47	6,392	922.70	534	757.80	5,858	937.70
48	6,320	933.80	548	777.90	5,772	948.60
49	5,920	938.50	558	786.50	5,362	954.40
50–54	21,604	952.00	2,093	790.90	19,511	969.30
50	5,538	949.40	514	767.80	5,024	968.00
51	4,764	944.50	433	772.70	4,331	961.70
52	4,252	957.60	421	823.70	3,831	972.30
53	3,841	961.30	393	808.10	3,448	978.70
54	3,209	949.00	332	788.40	2,877	967.60
55–59	10,921	944.60	1,210	805.90	9,711	961.90
55	2,882	945.70	314	831.60	2,568	959.70
56	2,394	939.10	283	781.30	2,111	960.30
57	2,119	945.70	251	773.10	1,868	968.90
58	1,826	946.30	191	823.30	1,635	960.70
59	1,700	947.20	171	827.60	1,529	960.50
60–61	3,267	942.10	299	785.60	2,968	957.80
60	1,685	953.60	182	806.20	1,503	971.50
61	1,582	929.80	117	753.50	1,465	943.80
62 or older	5,703	923.70	216	834.70	5,487	927.20
By marital status						
Nondivorced	144,365	849.50	11,115	732.20	133,250	859.30
Divorced	13,696	842.60	776	696.20	12,920	851.40

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

NOTE: Beginning with this year's edition we have removed the race breakdown because the quality of the data has become too inconsistent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.6—Number and average monthly benefit for nondisabled widow(er)s, by age, marital status, and sex, December 2010

Age and marital status	All nondisabled widow(er)s		Men		Women	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Total	4,040,960	1,133.90	65,538	977.90	3,975,422	1,136.40
By age						
60–61	124,848	1,072.40	10,873	853.80	113,975	1,093.30
60	49,028	1,080.60	4,146	862.20	44,882	1,100.70
61	75,820	1,067.20	6,727	848.70	69,093	1,088.50
62–64	331,102	1,132.00	21,369	1,018.40	309,733	1,139.80
62	97,019	1,118.50	7,090	986.00	89,929	1,128.90
63	116,687	1,136.50	7,449	1,030.00	109,238	1,143.80
64	117,396	1,138.60	6,830	1,039.20	110,566	1,144.80
65–69	622,658	1,219.40	18,876	1,147.70	603,782	1,221.70
65	114,695	1,143.90	5,645	1,056.80	109,050	1,148.40
66	127,777	1,240.10	4,574	1,177.30	123,203	1,242.40
67	134,832	1,256.50	3,820	1,220.10	131,012	1,257.50
68	129,393	1,240.70	2,913	1,183.90	126,480	1,242.00
69	115,961	1,204.60	1,924	1,145.50	114,037	1,205.60
70–74	521,258	1,132.40	4,728	925.60	516,530	1,134.30
70	101,520	1,168.60	1,241	1,014.10	100,279	1,170.50
71	100,102	1,146.80	1,009	971.80	99,093	1,148.60
72	104,174	1,127.70	891	897.30	103,283	1,129.70
73	104,566	1,113.80	796	839.60	103,770	1,115.90
74	110,896	1,108.30	791	846.40	110,105	1,110.20
75–79	627,631	1,109.10	3,420	775.30	624,211	1,110.90
75	117,258	1,106.30	699	802.20	116,559	1,108.20
76	122,881	1,111.80	737	815.80	122,144	1,113.60
77	121,288	1,108.40	670	785.10	120,618	1,110.20
78	130,536	1,106.70	696	758.10	129,840	1,108.60
79	135,668	1,111.70	618	705.10	135,050	1,113.50
80–84	734,212	1,111.40	2,992	728.40	731,220	1,112.90
80	146,123	1,116.20	687	777.30	145,436	1,117.80
81	145,248	1,115.30	649	737.20	144,599	1,117.00
82	147,500	1,110.80	607	737.20	146,893	1,112.30
83	149,729	1,110.20	545	685.90	149,184	1,111.80
84	145,612	1,104.50	504	685.90	145,108	1,106.00
85–89	638,851	1,111.50	1,983	669.20	636,868	1,112.90
85	140,501	1,107.10	484	692.50	140,017	1,108.50
86	138,009	1,103.40	432	669.60	137,577	1,104.80
87	128,416	1,107.90	391	667.70	128,025	1,109.30
88	119,282	1,115.20	368	650.50	118,914	1,116.60
89	112,643	1,127.40	308	656.50	112,335	1,128.70
90–94	325,785	1,151.80	902	645.90	324,883	1,153.20
95 or older	114,615	1,101.00	395	662.90	114,220	1,102.60
By marital status						
Nondivorced	3,669,453	1,129.10	59,214	967.80	3,610,239	1,131.80
Divorced	371,507	1,180.80	6,324	1,071.90	365,183	1,182.70

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

NOTE: Beginning with this year's edition we have removed the race breakdown because the quality of the data has become too inconsistent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.7—Number and average monthly benefit for disabled widow(er)s, by age, marital status, and sex, December 2010

Age and marital status	All disabled widow(er)s		Men		Women	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Total	244,953	681.30	12,220	498.70	232,733	690.90
By age						
50–54	33,837	663.20	2,092	479.60	31,745	675.30
50	3,022	675.80	173	472.60	2,849	688.10
51	5,117	654.60	304	471.00	4,813	666.20
52	6,745	668.80	400	493.80	6,345	679.80
53	8,674	662.50	582	475.00	8,092	676.00
54	10,279	660.60	633	481.10	9,646	672.40
55–59	83,479	681.00	4,892	499.30	78,587	692.30
55	12,236	672.20	671	487.50	11,565	682.90
56	14,605	680.20	867	508.60	13,738	691.00
57	16,491	678.60	998	508.00	15,493	689.60
58	18,913	684.20	1,144	485.80	17,769	697.00
59	21,234	685.80	1,212	504.80	20,022	696.70
60–65	127,637	686.30	5,236	505.80	122,401	694.00
60	22,237	678.20	1,289	501.90	20,948	689.00
61	22,259	686.40	1,099	509.20	21,160	695.60
62	22,014	690.70	947	496.80	21,067	699.40
63	22,440	689.40	799	514.80	21,641	695.80
64	20,466	690.40	620	504.80	19,846	696.20
65	18,221	682.40	482	511.80	17,739	687.10
By marital status						
Nondivorced	210,707	677.60	11,322	491.30	199,385	688.20
Divorced	34,246	704.00	898	592.40	33,348	707.10

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

NOTE: Beginning with this year's edition we have removed the race breakdown because the quality of the data has become too inconsistent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 5.A1.8—Number and average monthly benefit for parents, by age and sex, December 2010

Age	All parents		Men		Women	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Total	1,573	998.20	191	916.80	1,382	1,009.40
62–69	90	1,065.10	14	951.70	76	1,086.00
70–74	190	1,016.40	22	920.50	168	1,028.90
75–79	293	997.30	47	962.80	246	1,003.90
80–84	351	1,034.40	38	943.10	313	1,045.50
85–89	319	984.30	40	857.70	279	1,002.40
90 or older	330	945.10	30	871.20	300	952.50

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

NOTE: Beginning with this year's edition we have removed the race breakdown because the quality of the data has become too inconsistent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, age, and sex, December 2010

Age and type of benefit	All		Men		Women	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Retired workers						
Total	25,555,808	1,100.70	12,556,581	1,231.10	12,999,227	974.80
62–64	3,432,082	1,035.00	1,697,581	1,193.70	1,734,501	879.70
62	897,043	1,013.90	437,796	1,168.10	459,247	866.80
63	1,270,808	1,021.20	628,522	1,177.30	642,286	868.40
64	1,264,231	1,063.90	631,263	1,227.80	632,968	900.40
65–69	6,989,870	1,144.00	3,564,574	1,313.50	3,425,296	967.50
65	1,223,544	1,080.10	614,556	1,242.40	608,988	916.20
66	1,441,074	1,132.50	734,338	1,300.00	706,736	958.50
67	1,516,638	1,146.60	774,080	1,316.00	742,558	970.10
68	1,483,528	1,168.80	759,510	1,340.80	724,018	988.40
69	1,325,086	1,184.60	682,090	1,359.00	642,996	999.60
70–74	5,478,891	1,145.30	2,827,427	1,302.70	2,651,464	977.50
70	1,228,489	1,178.90	633,604	1,350.30	594,885	996.40
71	1,155,116	1,160.50	597,312	1,325.60	557,804	983.80
72	1,125,758	1,152.50	582,749	1,313.30	543,009	979.90
73	1,022,494	1,132.20	527,934	1,282.60	494,560	971.60
74	947,034	1,088.90	485,828	1,221.70	461,206	949.00
75–79	3,880,390	1,056.40	1,967,354	1,160.20	1,913,036	949.80
75	881,619	1,061.70	449,192	1,180.50	432,427	938.30
76	809,424	1,047.60	412,557	1,154.20	396,867	936.70
77	745,076	1,049.70	377,661	1,150.40	367,415	946.10
78	742,453	1,067.80	375,118	1,169.60	367,335	963.90
79	701,818	1,055.30	352,826	1,141.80	348,992	967.80
80–84	2,976,176	1,064.90	1,425,824	1,134.40	1,550,352	1,001.00
80	683,502	1,054.80	341,397	1,134.20	342,105	975.60
81	624,433	1,054.50	306,277	1,125.30	318,156	986.40
82	596,691	1,071.40	286,657	1,144.80	310,034	1,003.60
83	564,381	1,078.40	262,504	1,147.00	301,877	1,018.80
84	507,169	1,068.60	228,989	1,119.10	278,180	1,027.00
85–89	1,854,571	1,071.90	774,294	1,089.40	1,080,277	1,059.40
85	470,701	1,085.50	206,548	1,137.30	264,153	1,045.00
86	421,876	1,069.70	179,344	1,099.00	242,532	1,048.10
87	365,267	1,063.20	152,098	1,071.70	213,169	1,057.10
88	316,815	1,066.80	127,454	1,059.90	189,361	1,071.40
89	279,912	1,069.70	108,850	1,042.30	171,062	1,087.10
90–94	742,419	1,112.70	252,217	1,072.70	490,202	1,133.30
95 or older	201,409	1,109.70	47,310	1,118.80	154,099	1,107.00
Disabled workers						
Total	79,944	1,293.00	48,511	1,464.80	31,433	1,027.90
62	5,012	1,334.40	3,010	1,498.70	2,002	1,087.50
63	18,338	1,315.50	11,239	1,482.90	7,099	1,050.40
64	26,907	1,306.70	16,277	1,483.60	10,630	1,035.80
65	29,687	1,259.80	17,985	1,430.80	11,702	996.90
Spouses						
Total	1,927,968	551.20	20,009	316.70	1,907,959	553.70
By age						
62–64	253,411	473.60	3,708	282.80	249,703	476.50
62	60,054	454.90	787	272.30	59,267	457.40
63	92,666	469.20	1,364	275.70	91,302	472.10
64	100,691	488.90	1,557	294.40	99,134	492.00
65–69	546,704	569.20	8,898	335.60	537,806	573.10
65	110,115	521.10	2,051	319.80	108,064	524.90
66	108,695	572.60	2,070	346.40	106,625	577.00
67	112,717	582.90	1,890	341.40	110,827	587.00
68	111,708	585.80	1,539	334.70	110,169	589.30
69	103,469	584.20	1,348	336.20	102,121	587.50

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A3—Number and average monthly benefit, with reduction for early retirement, by type of benefit, age, and sex, December 2010—Continued

Age and type of benefit	All		Men		Women	
	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)
Spouses (cont.)						
70–74	451,896	577.00	4,343	319.50	447,553	579.50
70	98,978	581.10	1,193	328.20	97,785	584.20
71	93,771	578.80	1,061	321.90	92,710	581.70
72	91,840	578.20	822	317.30	91,018	580.60
73	85,909	575.30	667	320.00	85,242	577.30
74	81,398	570.10	600	300.90	80,798	572.10
75–79	342,911	554.10	1,808	301.20	341,103	555.50
75	77,485	563.60	462	315.20	77,023	565.10
76	71,635	552.80	399	298.20	71,236	554.30
77	66,351	551.30	337	301.70	66,014	552.60
78	65,452	549.90	320	295.20	65,132	551.10
79	61,988	551.20	290	288.80	61,698	552.40
80–84	226,789	546.80	919	293.10	225,870	547.80
85–89	89,660	531.00	266	286.80	89,394	531.80
90–94	15,563	554.30	46	373.10	15,517	554.90
95 or older	1,034	546.50	21	322.80	1,013	551.10
By type of benefit						
Spouses of retired workers	1,849,617	560.50	16,617	332.50	1,833,000	562.60
Spouses of disabled workers	78,351	332.50	3,392	239.20	74,959	336.70
Nondisabled widow(er)s						
Total	2,382,809	1,070.10	53,147	999.20	2,329,662	1,071.80
60–64	455,678	1,115.80	32,227	962.90	423,451	1,127.40
60	48,995	1,080.80	4,144	862.00	44,851	1,101.00
61	75,771	1,067.30	6,724	848.80	69,047	1,088.50
62	96,966	1,118.60	7,087	986.20	89,879	1,129.00
63	116,619	1,136.60	7,443	1,030.00	109,176	1,143.90
64	117,327	1,138.80	6,829	1,039.20	110,498	1,145.00
65–69	545,035	1,189.10	15,642	1,112.40	529,393	1,191.30
65	114,615	1,144.00	5,644	1,056.80	108,971	1,148.50
66	115,415	1,211.30	3,796	1,139.80	111,619	1,213.70
67	115,110	1,218.00	2,767	1,162.60	112,343	1,219.40
68	107,308	1,203.10	2,095	1,139.60	105,213	1,204.40
69	92,587	1,164.80	1,340	1,122.30	91,247	1,165.40
70–74	360,995	1,084.90	2,699	959.10	358,296	1,085.80
70	77,207	1,127.60	811	1,029.70	76,396	1,128.70
71	71,377	1,100.50	593	971.50	70,784	1,101.60
72	72,123	1,078.50	488	957.50	71,635	1,079.30
73	69,555	1,060.70	422	891.20	69,133	1,061.70
74	70,733	1,052.90	385	867.80	70,348	1,053.90
75–79	341,225	1,025.40	1,301	844.30	339,924	1,026.10
75	71,049	1,040.70	311	853.50	70,738	1,041.50
76	70,485	1,035.30	303	880.50	70,182	1,035.90
77	65,776	1,022.30	261	828.10	65,515	1,023.10
78	67,213	1,014.70	233	846.70	66,980	1,015.30
79	66,702	1,012.30	193	791.50	66,509	1,012.90
80–84	320,201	990.80	781	806.40	319,420	991.30
85–89	231,705	947.90	360	726.70	231,345	948.20
90–94	98,581	915.80	106	727.70	98,475	916.00
95 or older	29,389	841.40	31	565.90	29,358	841.70

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

NOTE: Beginning with this year's edition we have removed the race breakdown because the quality of the data has become too inconsistent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A4—Number and total monthly benefits, by trust fund and type of benefit, December 1940–2010, selected years

Year	OASDI			Retired workers	Disabled workers	Wives and husbands	Children	Widowed mothers and fathers	Widow(er)s	Parents	Special age-72 beneficiaries
	Total	OASI trust fund	DI trust fund								
<i>Number</i>											
1940	222,488	222,488	...	112,331	...	29,749	54,648	20,499	4,437	824	...
1945	1,288,107	1,288,107	...	518,234	...	159,168	390,134	120,581	93,781	6,209	...
1950	3,477,243	3,477,243	...	1,770,984	...	508,350	699,703	169,438	314,189	14,579	...
1955	7,960,616	7,960,616	...	4,473,971	...	1,191,963	1,276,240	291,916	701,360	25,166	...
1957	11,128,897	10,979,047	149,850	6,197,532	149,850	1,827,048	1,502,077	328,309	1,095,137	28,944	...
1960	14,844,589	14,157,138	687,451	8,061,469	455,371	2,345,983	2,000,451	401,358	1,543,843	36,114	...
1965	20,866,767	19,127,716	1,739,051	11,100,584	988,074	2,806,912	3,092,659	471,816	2,371,433	35,289	...
1966	22,767,252	20,796,930	1,970,322	11,658,443	1,097,190	2,860,026	3,392,970	487,755	2,602,015	34,540	634,313
1970	26,228,629	23,563,634	2,664,995	13,349,175	1,492,948	2,951,552	4,122,305	523,136	3,227,160	28,729	533,624
1975	32,084,511	27,732,311	4,352,200	16,588,001	2,488,774	3,320,310	4,972,008	581,845	3,888,705	21,444	223,424
1980	35,584,955	30,906,511	4,678,444	19,562,085	2,858,680	3,477,427	4,606,517	562,316	4,410,515	14,779	92,636
1985	37,058,317	33,151,003	3,907,314	22,431,930	2,656,638	3,374,599	3,319,490	371,659	4,862,805	9,541	31,655
1990	39,832,125	35,566,144	4,265,981	24,838,100	3,011,294	3,366,975	3,187,010	303,923	5,111,482	5,908	7,433
1991	40,592,173	36,079,133	4,513,040	25,288,719	3,194,938	3,370,454	3,268,252	300,661	5,158,383	5,467	5,299
1992	41,507,188	36,617,492	4,889,696	25,757,727	3,467,783	3,382,189	3,391,173	294,176	5,205,375	5,083	3,682
1993	42,245,719	36,992,153	5,253,566	26,104,305	3,725,966	3,367,206	3,527,483	289,350	5,224,279	4,673	2,457
1994	42,883,470	37,299,951	5,583,519	26,407,756	3,962,954	3,337,484	3,653,887	283,072	5,232,379	4,318	1,620
1995	43,387,259	37,529,603	5,857,656	26,672,806	4,185,263	3,289,551	3,734,097	275,020	5,225,519	3,976	1,027
1996	43,736,836	37,664,802	6,072,034	26,898,072	4,385,623	3,194,080	3,802,791	242,135	5,209,812	3,670	653
1997	43,971,086	37,818,047	6,153,039	27,274,572	4,508,134	3,129,129	3,771,774	230,222	5,053,442	3,419	394
1998	44,245,731	37,911,161	6,334,570	27,510,535	4,698,319	3,054,073	3,768,928	220,610	4,989,855	3,186	225
1999	44,595,624	38,071,894	6,523,730	27,774,677	4,879,455	2,987,307	3,794,795	212,401	4,943,915	2,931	143
2000	45,414,794	38,741,432	6,673,362	28,498,945	5,042,334	2,963,326	3,802,863	203,052	4,901,437	2,748	89
2001	45,877,506	38,964,263	6,913,243	28,836,774	5,274,183	2,898,861	3,839,381	197,375	4,828,327	2,564	41
2002	46,444,317	39,233,049	7,221,268	29,190,137	5,543,981	2,832,767	3,910,256	194,117	4,770,638	2,400	21
2003	47,038,486	39,443,034	7,595,452	29,531,611	5,873,673	2,772,577	3,960,909	190,252	4,707,215	2,238	21
2004	47,687,693	39,737,824	7,949,869	29,952,465	6,198,271	2,721,657	3,986,319	183,829	4,643,035	2,108	9
2005	48,434,281	40,128,579	8,305,702	30,460,836	6,518,989	2,680,259	4,024,815	178,396	4,568,991	1,992	3
2006	49,122,624	40,510,508	8,612,116	30,976,143	6,806,918	2,632,069	4,040,530	171,453	4,493,620	1,889	2
2007	49,864,838	40,948,624	8,916,214	31,527,728	7,098,723	2,584,884	4,050,691	164,665	4,436,338	1,809	--
2008	50,898,244	41,625,450	9,272,794	32,273,651	7,426,691	2,524,841	4,131,594	159,610	4,380,164	1,693	--
2009	52,522,819	42,828,705	9,694,114	33,514,013	7,788,013	2,501,723	4,230,578	159,870	4,326,976	1,646	--
2010	54,031,968	43,847,811	10,184,157	34,593,080	8,203,951	2,476,836	4,312,554	158,061	4,285,913	1,573	--

(Continued)

5.A OASDI Current-Pay Benefits: Summary

Table 5.A4—Number and total monthly benefits, by trust fund and type of benefit, December 1940–2010, selected years—Continued

Year	OASDI			Retired workers	Disabled workers	Wives and husbands	Children	Widowed mothers and fathers	Widow(er)s	Parents	Special age-72 beneficiaries
	Total	OASI trust fund	DI trust fund								
<i>Total monthly benefits (thousands of dollars)</i>											
1940	4,070	4,070	...	2,539	...	361	668	402	90	11	...
1945	23,801	23,801	...	12,538	...	2,040	4,858	2,391	1,893	81	...
1950	126,857	126,857	...	77,678	...	11,995	19,366	5,801	11,481	535	...
1955	411,613	411,613	...	276,942	...	39,416	46,444	13,403	34,152	1,256	...
1957	605,455	594,552	10,904	400,250	10,904	62,802	57,952	16,102	55,944	1,501	...
1960	936,321	888,320	48,000	596,849	40,668	90,503	93,275	23,795	89,054	2,178	...
1965	1,516,802	1,395,817	120,986	931,532	96,599	120,796	159,428	30,882	174,883	2,683	...
1966	1,638,548	1,502,863	135,685	983,338	107,627	123,262	175,100	31,983	192,821	2,642	21,777
1970	2,628,326	2,385,926	242,400	1,576,551	196,010	175,323	279,845	45,258	328,245	2,965	24,128
1975	5,727,758	5,047,656	680,102	3,436,752	562,180	332,159	544,048	85,676	747,903	3,685	15,354
1980	10,682,791	9,422,206	1,260,585	6,678,216	1,059,792	569,528	864,242	138,426	1,358,836	4,080	9,672
1985	15,901,579	14,441,682	1,459,896	10,736,304	1,285,375	796,351	858,006	123,557	2,094,003	3,609	4,373
1990	21,686,763	19,716,655	1,970,108	14,966,531	1,768,313	1,004,852	991,628	124,340	2,827,012	2,849	1,238
1991	23,076,535	20,912,298	2,164,237	15,914,665	1,946,823	1,049,463	1,045,006	127,510	2,989,385	2,767	915
1992	24,442,156	22,033,164	2,408,992	16,810,432	2,171,080	1,089,504	1,100,812	128,748	3,138,250	2,676	655
1993	25,662,445	23,011,870	2,650,575	17,595,964	2,390,829	1,117,643	1,160,403	129,752	3,264,849	2,557	448
1994	26,936,223	24,032,186	2,904,037	18,415,099	2,620,982	1,144,466	1,226,468	131,463	3,394,982	2,459	303
1995	28,148,078	24,993,131	3,154,947	19,199,157	2,853,365	1,164,029	1,283,288	131,430	3,514,262	2,349	197
1996	29,426,079	26,017,474	3,408,605	20,038,023	3,087,223	1,177,458	1,356,685	124,678	3,639,632	2,252	129
1997	30,463,716	26,884,933	3,578,782	20,864,462	3,252,919	1,185,143	1,389,552	122,488	3,646,898	2,173	79
1998	31,298,873	27,519,891	3,778,982	21,449,654	3,444,259	1,179,882	1,417,362	120,247	3,685,349	2,074	46
1999	32,578,327	28,548,030	4,030,297	22,339,070	3,679,691	1,188,814	1,473,988	120,157	3,774,601	1,975	30
2000	34,848,920	30,517,277	4,331,642	24,066,918	3,965,304	1,233,598	1,547,808	120,812	3,912,527	1,934	19
2001	36,504,206	31,823,443	4,680,763	25,215,898	4,295,600	1,246,333	1,624,285	122,526	3,997,687	1,868	9
2002	37,854,453	32,823,008	5,031,445	26,125,090	4,625,445	1,242,317	1,692,471	124,267	4,043,051	1,806	5
2003	39,541,528	34,048,860	5,492,667	27,230,634	5,060,493	1,247,504	1,763,910	126,278	4,110,963	1,744	3
2004	41,574,348	35,573,407	6,000,941	28,601,329	5,542,045	1,262,709	1,838,926	126,734	4,200,895	1,707	2
2005	44,351,668	37,743,696	6,607,972	30,521,815	6,114,705	1,298,722	1,945,508	129,246	4,339,977	1,694	1
2006	46,938,032	39,763,705	7,174,327	32,351,856	6,655,048	1,322,423	2,031,723	129,721	4,445,575	1,685	1
2007	49,218,145	41,552,564	7,665,581	34,004,494	7,127,082	1,333,410	2,095,892	128,742	4,526,864	1,661	--
2008	53,666,109	45,189,225	8,476,883	37,207,910	7,895,536	1,391,746	2,262,489	133,261	4,773,510	1,657	--
2009	55,905,731	47,015,977	8,889,754	39,020,920	8,288,762	1,390,950	2,311,770	134,547	4,757,157	1,626	--
2010	58,048,295	48,663,019	9,385,276	40,662,492	8,759,959	1,389,565	2,351,759	134,179	4,748,771	1,570	--

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

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

... = not applicable; -- = not available.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A5—Number and average age, by type of benefit, December 2010

Type of benefit	Number (thousands)	Average age
Total, OASDI	54,032	66
OASI	43,848	71
Retired workers	34,593	74
Spouses of retired workers	2,317	73
Children of retired workers	580	25
Under age 18	310	13
Disabled adult children	250	40
Students, aged 18–19	20	18
Children of deceased workers	1,913	24
Under age 18	1,239	12
Disabled adult children	601	48
Students, aged 18–19	72	18
Nondisabled widow(er)s	4,041	77
Widowed mothers and fathers	158	44
Disabled widow(er)s	245	59
Parents of deceased workers	2	82
DI	10,184	46
Disabled workers	8,204	53
Spouses of disabled workers	160	55
Children of disabled workers	1,820	13
Under age 18	1,660	12
Disabled adult children	98	27
Students, aged 18–19	62	18

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 5.A6—Number and average monthly benefit, by age, type of benefit, and sex, December 2010

Type of benefit	All	Male	Female
<i>Number (thousands)</i>			
Total, OASDI	54,032	24,294	29,738
<i>By age</i>			
Adults	49,719	22,045	27,674
Children	4,313	2,248	2,064
Under age 18	3,209	1,635	1,574
Disabled adult children	949	527	422
Students, aged 18–19	155	87	68
Retired workers and their spouses and children	37,489	17,947	19,543
Retired workers	34,593	17,582	17,011
Spouses	2,317	57	2,260
Children	580	307	273
Disabled workers and their spouses and children	10,184	5,255	4,929
Disabled workers	8,204	4,310	3,894
Spouses	160	7	154
Children	1,820	939	881
Survivors of deceased workers	6,358	1,092	5,266
Nondisabled widow(er)s	4,041	66	3,975
Disabled widow(er)s	245	12	233
Widowed mothers and fathers	158	12	146
Children	1,913	1,002	911
Parents	2	^a	1
<i>Average monthly benefit (dollars)</i>			
Retired workers	1,175.50	1,323.10	1,022.90
Disabled workers	1,067.80	1,191.10	931.30
Widowed mothers and fathers	848.90	729.90	858.60
Nondisabled widow(er)s	1,133.90	977.90	1,136.40
Surviving children	751.80	750.60	753.00

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

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

Beginning with this year's edition we have removed the race breakdown because the quality of the data has become too inconsistent.

a. Fewer than 500.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A7—Number and average monthly benefit for women, by type of benefit and basis of entitlement, December 2010

Type of benefit and basis of entitlement	Number (thousands)	Average monthly benefit (dollars)
All women		
Total ^a	27,673	982.90
Workers	20,905	1,005.80
Retired	17,011	1,022.90
Full benefit	4,012	1,178.90
Reduced benefit	12,999	974.80
Disabled	3,894	931.30
Wives of retired and disabled workers	2,413	566.50
Entitlement based on care of children	115	331.10
Husband retired	43	509.10
Husband disabled	72	224.80
Entitlement based on age	2,298	578.30
Husband retired	2,216	586.90
Full benefit	383	703.20
Reduced benefit	1,833	562.60
Husband disabled	81	344.80
Widows	4,354	1,103.30
Entitlement based on care of children	146	858.60
Nondisabled, aged 60 or older	3,975	1,136.40
Disabled, aged 50 to FRA	233	690.90
Women aged 65 or older		
Total ^a	21,048	1,011.20
Entitled as worker	15,429	1,038.40
Worker only	9,251	1,017.60
Dually entitled	6,179	1,069.50
Wife's benefit	2,534	719.90
Widow's benefit	3,645	1,312.50
Entitled as wife or widow only	5,619	936.60
Wife's benefit	2,050	590.70
Widow's benefit	3,569	1,135.30

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

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

FRA = full retirement age.

Beginning with this year's edition we have removed the race breakdown because the quality of the data has become too inconsistent.

a. Excludes parents and disabled adult children receiving benefits because of a childhood disability.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

Type of benefit and sex	Number	Average primary insurance amount (dollars)	Average monthly benefit (dollars)
All beneficiaries	76,129	639.30	830.40
Retirement benefits			
Total	70,236	633.80	852.00
Retired workers	68,283	634.70	869.30
Men	15,175	595.00	529.10
Women	53,108	646.10	966.60
Wives and husbands of retired workers	1,746	597.80	244.20
Children of retired workers	207	636.20	259.40
Disability benefits			
Total	37	604.20	554.70
Survivor benefits			
Total	5,856	706.00	572.60
Nondisabled widow(er)s	4,623	703.00	592.30
Disabled widow(er)s	73	701.40	423.80
Widowed mothers and fathers	11	679.80	481.80
Children of deceased workers	1,149	718.70	503.60

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

Type of benefit	Total, 60 or older	60–61	62–64	65–69	70–74	75–79	80–84	85–89	90–99	100 or older
Number (thousands)										
<i>All beneficiaries</i>										
Total	43,707	1,013	5,403	11,009	8,866	6,842	5,335	3,409	1,779	51
Retired workers	34,593	...	3,432	9,360	7,766	5,749	4,290	2,636	1,325	35
Widow(er)s, parents, and mothers and fathers	4,179	173	400	642	521	628	735	639	424	16
Wives and husbands	2,372	4	260	633	558	452	304	131	29	^a
Disabled workers	2,430	812	1,279	339	...	...	...	...	...	...
Disabled adult children	134	24	32	34	20	12	7	3	1	^a
<i>Men</i>										
Subtotal	19,090	462	2,433	5,167	4,131	3,032	2,164	1,202	492	8
Retired workers	17,582	...	1,698	4,930	4,100	3,011	2,151	1,196	489	7
Widowers, parents, and fathers	71	14	24	19	5	3	3	2	1	^a
Husbands	62	^a	4	17	16	13	8	3	1	^a
Disabled workers	1,310	435	691	184	...	...	...	...	...	...
Disabled adult children	65	13	16	17	10	5	3	1	^a	^a
<i>Women</i>										
Subtotal	24,617	552	2,970	5,842	4,735	3,810	3,171	2,207	1,287	44
Retired workers	17,011	...	1,735	4,430	3,665	2,738	2,140	1,441	836	27
Widows, parents, and mothers	4,108	159	377	623	517	624	732	637	423	16
Wives	2,310	4	256	616	543	440	296	127	28	^a
Disabled workers	1,120	377	587	155	...	...	...	...	...	...
Disabled adult children	69	12	15	17	11	7	4	2	1	^a
Average monthly benefit (dollars)										
<i>All beneficiaries</i>										
Total	1,137.60	1,136.90	1,051.00	1,185.00	1,172.40	1,100.60	1,112.30	1,122.70	1,183.10	1,088.50
Retired workers	1,175.50	...	1,035.00	1,224.50	1,218.60	1,142.00	1,151.30	1,153.20	1,208.90	1,120.50
Widow(er)s, parents, and mothers and fathers	1,119.70	969.40	1,058.10	1,203.60	1,132.40	1,109.00	1,111.30	1,111.50	1,142.90	1,024.30
Wives and husbands	572.30	511.20	475.10	597.20	583.60	575.30	575.20	574.20	610.50	^a
Disabled workers	1,205.20	1,188.10	1,216.50	1,203.70	...	...	...	...	...	...
Disabled adult children	713.60	730.80	731.50	740.70	710.80	656.80	620.50	591.30	560.90	^a
<i>Men</i>										
Subtotal	1,321.10	1,322.40	1,248.00	1,399.10	1,377.70	1,263.40	1,255.70	1,223.80	1,270.30	1,225.00
Retired workers	1,323.10	...	1,193.70	1,405.40	1,383.80	1,268.90	1,260.70	1,227.80	1,274.30	1,231.50
Widowers, parents, and fathers	941.90	790.90	966.10	1,131.30	925.60	777.80	731.10	673.10	652.90	^a
Husbands	358.40	^a	283.60	436.60	347.70	330.40	315.70	305.70	323.20	^a
Disabled workers	1,391.30	1,356.90	1,408.60	1,407.50	...	...	...	...	...	...
Disabled adult children	708.80	721.70	723.50	731.10	703.90	648.10	617.70	578.80	^a	^a
<i>Women</i>										
Subtotal	995.40	981.70	889.60	995.70	993.20	971.10	1,014.50	1,067.70	1,149.70	1,065.00
Retired workers	1,022.90	...	879.70	1,023.10	1,033.80	1,002.50	1,041.40	1,091.40	1,170.60	1,090.20
Widows, parents, and mothers	1,122.80	984.60	1,063.90	1,205.80	1,134.30	1,110.80	1,112.90	1,112.90	1,144.30	1,025.40
Wives	578.10	514.00	477.90	601.70	590.40	582.20	582.20	581.30	621.40	^a
Disabled workers	987.40	993.10	990.40	962.40	...	...	...	...	...	...
Disabled adult children	718.10	740.90	740.10	750.00	717.00	663.20	622.30	596.90	566.90	^a

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

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

... = not applicable.

a. Fewer than 500 beneficiaries.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 1960–2010, selected years

Entitlement	1960	1970	1975	1980	1985	1990	1995	2000	2005	2010
<i>Number (thousands)</i>										
All women 62 or older ^a	6,619	11,374	14,010	16,350	18,412	19,954	20,888	21,381	22,066	24,004
Entitled as worker ^b	2,866	5,753	7,586	9,304	10,805	12,037	12,974	14,013	15,291	17,750
Worker only	2,563	4,786	5,926	6,710	7,096	7,359	7,554	8,117	9,126	11,118
Dually entitled ^c	303	967	1,660	2,594	3,709	4,678	5,420	5,896	6,165	6,632
Wife's benefit	159	388	617	1,016	1,594	2,077	2,398	2,568	2,650	2,911
Widow's benefit	141	574	1,039	1,575	2,112	2,600	3,022	3,327	3,514	3,721
Entitled as wife or widow only ^c	3,753	5,621	6,424	7,046	7,607	7,917	7,914	7,368	6,775	6,254
Wife's benefit	2,174	2,546	2,745	2,884	3,018	3,059	2,985	2,768	2,511	2,306
Widow's benefit ^d	1,546	3,048	3,659	4,148	4,580	4,853	4,926	4,598	4,264	3,948
<i>Percentage distribution</i>										
All women 62 or older ^a	100.0	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	69.3	73.9
Worker only	38.7	42.1	42.3	41.0	38.5	36.9	36.2	38.0	41.4	46.3
Dually entitled ^c	4.6	8.5	11.8	15.9	20.1	23.4	25.9	27.6	28.0	27.6
Wife's benefit	2.4	3.4	4.4	6.2	8.7	10.4	11.5	12.0	12.0	12.1
Widow's benefit	2.1	5.0	7.4	9.6	11.5	13.0	14.4	15.6	16.0	15.5
Entitled as wife or widow only ^c	56.7	49.4	45.9	43.1	41.3	39.7	37.9	34.5	30.7	26.1
Wife's benefit	32.8	22.4	19.6	17.6	16.4	15.3	14.3	12.9	11.4	9.6
Widow's benefit ^d	23.4	26.8	26.1	25.4	24.9	24.3	23.6	21.5	19.3	16.4

SOURCE: Social Security Administration, Master Beneficiary Record. All data for 2005 and dual entitlement data for 1995 and 2000 are based on a 10 percent sample. All other years are 100 percent data.

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

- a. Excludes disabled adult children.
- b. Includes disabled workers.
- c. Includes parents.
- d. Includes disabled widows and mothers.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

Entitlement	Total, 65 or older	65–69	70–74	75–79	80–84	85–89	90 or older
<i>Number</i>							
All women 65 or older	21,048,404	5,821,671	4,723,809	3,801,832	3,166,244	2,204,982	1,329,866
Entitled as worker ^a	15,429,278	4,584,066	3,664,682	2,737,724	2,139,426	1,440,632	862,748
Worker only	9,250,778	3,358,471	2,446,872	1,528,802	993,492	576,491	346,650
Dually entitled ^b	6,178,500	1,225,595	1,217,810	1,208,922	1,145,934	864,141	516,098
Wife's benefit	2,533,703	916,432	689,207	490,158	296,520	116,989	24,397
Widow's benefit	3,644,797	309,163	528,603	718,764	849,414	747,152	491,701
Entitled as wife or widow only	5,619,126	1,237,605	1,059,127	1,064,108	1,026,818	764,350	467,118
Wife's benefit	2,049,832	616,142	542,647	439,926	295,615	127,485	28,017
Widow's benefit	3,569,294	621,463	516,480	624,182	731,203	636,865	439,101
<i>Average monthly benefit (dollars)</i>							
All women 65 or older	1,011.20	996.50	993.90	971.60	1,015.10	1,068.10	1,147.30
Entitled as worker ^a	1,038.40	1,021.10	1,033.80	1,002.50	1,041.40	1,091.40	1,168.00
Worker only	1,017.60	1,058.10	1,045.40	957.00	943.50	943.70	1,032.80
Dually entitled ^b	1,069.50	919.70	1,010.50	1,060.00	1,126.30	1,189.90	1,258.90
Wife's benefit	719.90	757.90	731.20	686.40	663.50	649.10	674.90
Widow's benefit	1,312.50	1,399.10	1,374.70	1,314.90	1,287.90	1,274.60	1,287.90
Entitled as wife or widow only	936.60	905.40	855.60	892.30	960.10	1,024.30	1,108.90
Wife's benefit	590.70	601.70	590.40	582.20	582.20	581.30	621.50
Widow's benefit	1,135.30	1,206.50	1,134.30	1,110.90	1,112.90	1,112.90	1,140.00

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

- a. Includes disabled workers
 - b. Excludes parents and disabled adult children.
- CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

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	49,719	7,134	5,371	37,214	1,120.20	1,009.60	1,052.90	1,151.10
Retired workers	34,593	...	3,432	31,161	1,175.50	...	1,035.00	1,190.90
Disabled workers	8,204	6,586	1,279	339	1,067.80	1,031.90	1,216.50	1,203.70
Wives and husbands of retired workers	2,317	36	211	2,070	580.00	497.70	509.40	588.70
Wives and husbands of disabled workers	160	73	49	38	286.50	221.70	328.80	356.10
Nondisabled widow(er)s	4,041	125	331	3,585	1,133.90	1,072.40	1,132.00	1,136.20
Disabled widow(er)s	245	162	65	18	681.30	677.60	690.10	682.40
Mothers and fathers	158	152	4	1	848.90	846.10	926.60	913.80
Men								
Subtotal	22,045	3,468	2,417	16,160	1,292.60	1,131.20	1,251.50	1,333.50
Retired workers	17,582	...	1,698	15,885	1,323.10	...	1,193.70	1,336.90
Disabled workers	4,310	3,434	691	184	1,191.10	1,135.70	1,408.60	1,407.50
Husbands of retired workers	57	^b	2	55	366.00	450.40	318.40	368.10
Husbands of disabled workers	7	2	1	3	241.70	177.10	219.60	286.30
Nondisabled widowers	66	11	21	33	977.90	853.80	1,018.40	992.40
Disabled widowers	12	9	2	^b	498.70	496.40	505.00	511.80
Fathers	12	12	^b	^b	729.90	728.00	831.60	855.60
Women								
Subtotal	27,674	3,666	2,955	21,054	982.90	894.60	890.40	1,011.20
Retired workers	17,011	...	1,735	15,276	1,022.90	...	879.70	1,039.20
Disabled workers	3,894	3,151	587	155	931.30	918.80	990.40	962.40
Wives of retired workers	2,260	36	208	2,015	585.40	497.80	511.60	594.60
Wives of disabled workers	154	71	48	35	288.40	222.90	331.80	363.00
Nondisabled widows	3,975	114	310	3,552	1,136.40	1,093.30	1,139.80	1,137.50
Disabled widows	233	152	63	18	690.90	688.80	697.10	687.10
Mothers	146	141	4	1	858.60	855.90	930.80	915.10

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

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

... = not applicable.

a. Includes parents. Excludes student beneficiaries aged 18–19 and disabled adult children.

b. Fewer than 500 beneficiaries.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A17—Number and average monthly benefit for disabled beneficiaries, by type of benefit, December 1957–2010

Year	Number				Average monthly benefit (dollars)		
	All disabled beneficiaries	Workers	Widow(er)s	Disabled adult children	Workers	Widow(er)s	Disabled adult children
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	21,563	243,654	111.86	72.25	61.83
1969	1,690,982	1,394,291	39,469	257,222	112.74	71.02	62.79
1970	1,812,786	1,492,948	49,281	270,557	131.26	82.00	73.21
1971	1,990,098	1,647,684	56,743	285,671	146.52	90.11	81.37
1972	2,202,090	1,832,916	64,167	305,007	179.32	109.54	98.81
1973	2,415,383	2,016,626	78,769	319,988	183.00	111.14	100.14
1974	2,670,092	2,236,882	92,128	341,082	205.70	125.87	112.45
1975	2,960,620	2,488,774	109,511	362,335	225.90	137.70	122.80
1976	3,171,198	2,670,208	119,427	381,563	245.17	147.01	132.32
1977	3,368,954	2,837,432	127,276	404,246	265.30	156.11	142.12
1978	3,429,421	2,879,774	129,751	419,896	288.30	165.46	153.66
1979	3,435,761	2,870,590	129,833	435,338	322.00	180.52	171.55
1980	3,436,429	2,858,680	127,580	450,169	370.70	205.02	198.95
1981	3,361,130	2,776,519	121,590	463,021	413.20	226.58	224.51
1982	3,192,379	2,603,599	116,372	472,408	440.60	242.11	245.07
1983	3,168,992	2,569,029	111,591	488,372	456.20	250.33	257.78
1984	3,212,040	2,596,516	109,151	506,373	470.70	306.24	270.28
1985	3,289,485	2,656,638	107,005	525,842	483.80	315.26	281.92
1986	3,380,480	2,728,463	106,974	545,043	487.90	319.74	288.79
1987	3,453,414	2,785,859	106,282	561,273	508.20	333.89	304.32
1988	3,507,707	2,830,284	103,123	574,300	529.50	348.05	320.21
1989	3,583,451	2,895,364	101,630	586,457	556.00	366.72	339.47
1990	3,712,763	3,011,294	100,989	600,480	587.20	388.93	361.71
1991	3,925,472	3,194,938	114,489	616,045	609.40	406.96	378.86
1992	4,236,080	3,467,783	131,324	636,973	626.10	422.65	393.61
1993	4,529,466	3,725,966	147,015	656,485	641.70	434.20	407.20
1994	4,796,313	3,962,954	160,676	672,683	661.40	446.30	422.40
1995	5,044,388	4,185,263	173,024	686,101	681.80	458.30	437.30
1996	5,264,321	4,385,623	181,911	696,787	703.90	471.00	454.30
1997	5,400,781	4,508,134	187,938	704,709	721.60	480.40	468.60
1998	5,605,272	4,698,319	194,181	712,772	733.10	487.30	479.40
1999	5,798,776	4,879,455	198,795	720,526	754.10	499.90	495.60
2000	5,972,450	5,042,334	201,427	728,689	786.40	519.70	518.30
2001	6,214,972	5,274,183	204,243	736,546	814.50	536.70	537.60
2002	6,495,868	5,543,981	207,358	744,529	834.30	548.10	550.40
2003	6,835,846	5,873,673	209,359	752,814	861.60	563.80	567.00
2004	7,168,270	6,198,271	210,735	759,264	894.10	582.70	587.60
2005	7,500,525	6,518,989	213,001	768,535	938.00	609.40	616.30
2006	7,803,692	6,806,918	220,178	776,596	977.70	630.70	642.40
2007	8,118,382	7,098,723	224,982	794,677	1,004.00	645.50	660.30
2008	8,528,164	7,426,691	230,007	871,466	1,063.10	683.60	681.70
2009	8,945,376	7,788,013	236,480	920,883	1,064.30	682.70	676.30
2010	9,398,104	8,203,951	244,953	949,200	1,067.80	681.30	678.80

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

NOTE: ... = not applicable.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

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	2,997,498	1,343.80	1,492.80	1,669,299	1,525.30	1,644.60	1,328,199	1,115.70	1,302.00
66-69	192,507	1,452.70	1,554.80	105,472	1,627.00	1,725.00	87,035	1,241.40	1,348.50
66	3,522	1,549.60	1,587.20	2,021	1,749.10	1,779.40	1,501	1,280.90	1,328.50
67	50,453	1,528.50	1,588.00	29,245	1,695.00	1,750.60	21,208	1,298.90	1,363.80
68	69,819	1,450.10	1,549.50	38,175	1,623.80	1,722.70	31,644	1,240.50	1,340.60
69	68,713	1,394.70	1,534.10	36,031	1,568.40	1,703.60	32,682	1,203.30	1,347.10
70-74	360,426	1,210.80	1,411.50	150,870	1,378.80	1,547.10	209,556	1,089.80	1,313.80
70	82,899	1,338.20	1,548.10	37,940	1,531.30	1,725.10	44,959	1,175.20	1,398.80
71	78,309	1,255.30	1,468.30	33,512	1,432.80	1,619.20	44,797	1,122.40	1,355.40
72	71,576	1,197.70	1,394.70	29,200	1,361.50	1,523.80	42,376	1,084.90	1,305.70
73	67,366	1,135.50	1,332.50	26,550	1,279.00	1,431.60	40,816	1,042.10	1,268.10
74	60,276	1,077.40	1,257.70	23,668	1,191.30	1,317.80	36,608	1,003.80	1,218.90
75-79	850,995	1,357.60	1,486.00	495,296	1,539.70	1,643.30	355,699	1,104.00	1,267.10
75	59,855	1,054.20	1,228.70	23,442	1,171.60	1,288.30	36,413	978.50	1,190.30
76	211,614	1,394.90	1,480.00	127,702	1,563.90	1,617.30	83,912	1,137.60	1,271.10
77	199,676	1,377.50	1,499.00	119,195	1,553.60	1,651.10	80,481	1,116.60	1,273.70
78	193,244	1,389.80	1,528.70	114,340	1,573.40	1,695.70	78,904	1,123.70	1,286.60
79	186,606	1,358.10	1,517.40	110,617	1,539.90	1,685.80	75,989	1,093.50	1,272.20
80-84	799,351	1,349.80	1,509.40	469,716	1,534.30	1,673.00	329,635	1,087.00	1,276.20
80	181,476	1,345.10	1,507.60	107,211	1,531.00	1,680.10	74,265	1,076.80	1,258.60
81	167,735	1,332.30	1,501.70	98,547	1,516.20	1,669.10	69,188	1,070.30	1,263.30
82	159,939	1,354.70	1,511.80	92,930	1,545.80	1,682.60	67,009	1,089.60	1,274.90
83	149,774	1,369.30	1,528.50	88,329	1,552.60	1,687.20	61,445	1,105.80	1,300.40
84	140,427	1,350.60	1,497.60	82,699	1,527.60	1,642.60	57,728	1,097.00	1,289.70
85-89	512,767	1,324.50	1,477.10	299,157	1,493.30	1,603.70	213,610	1,087.90	1,299.80
85	118,489	1,373.50	1,528.90	69,400	1,553.70	1,678.00	49,089	1,118.90	1,318.00
86	118,899	1,336.20	1,479.60	69,724	1,508.20	1,611.20	49,175	1,092.40	1,293.00
87	104,181	1,310.90	1,461.70	61,081	1,475.20	1,581.80	43,100	1,078.00	1,291.50
88	90,312	1,295.50	1,451.60	52,244	1,457.90	1,565.90	38,068	1,072.60	1,294.80
89	80,886	1,285.10	1,445.70	46,708	1,444.80	1,552.70	34,178	1,066.70	1,299.50
90 or older	281,452	1,416.20	1,556.80	148,788	1,589.90	1,683.80	132,664	1,221.30	1,414.30

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

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	6,039,774	1,276.20	1,334.10	3,356,355	1,505.50	1,507.00	2,683,419	989.50	1,117.90
66–69	2,177,715	1,419.30	1,453.60	1,259,878	1,638.00	1,638.80	917,837	1,119.20	1,199.50
66	592,060	1,415.20	1,444.40	340,972	1,621.90	1,622.60	251,088	1,134.50	1,202.50
67	593,952	1,420.30	1,453.90	342,840	1,634.90	1,635.70	251,112	1,127.30	1,205.70
68	533,175	1,423.40	1,460.20	310,895	1,648.10	1,648.90	222,280	1,109.20	1,196.20
69	458,528	1,418.70	1,457.60	265,171	1,650.80	1,651.70	193,357	1,100.30	1,191.40
70–74	1,926,388	1,346.30	1,390.90	1,122,184	1,564.90	1,566.10	804,204	1,041.40	1,146.50
70	423,776	1,406.40	1,446.80	245,063	1,636.30	1,637.30	178,713	1,091.10	1,185.50
71	392,214	1,369.40	1,412.00	227,195	1,592.30	1,593.40	165,019	1,062.50	1,162.20
72	380,689	1,347.90	1,393.00	220,977	1,569.40	1,570.80	159,712	1,041.30	1,147.00
73	372,859	1,317.20	1,363.70	218,325	1,531.80	1,533.10	154,534	1,014.10	1,124.40
74	356,850	1,278.50	1,327.80	210,624	1,481.80	1,483.20	146,226	985.70	1,103.90
75–79	1,017,698	1,108.30	1,180.60	548,465	1,318.50	1,320.70	469,233	862.50	1,016.70
75	359,257	1,261.10	1,311.60	212,539	1,459.30	1,460.90	146,718	974.00	1,095.50
76	197,617	1,040.90	1,120.50	101,580	1,245.30	1,247.80	96,037	824.60	985.80
77	167,177	1,026.10	1,108.00	85,838	1,228.60	1,231.20	81,339	812.40	978.00
78	155,121	1,022.20	1,107.10	78,534	1,227.10	1,229.90	76,587	812.00	981.20
79	138,526	1,003.70	1,096.30	69,974	1,210.20	1,212.80	68,552	792.90	977.20
80–84	514,653	986.70	1,095.00	255,093	1,204.50	1,207.60	259,560	772.80	984.30
80	128,414	993.40	1,091.00	64,501	1,200.60	1,203.80	63,913	784.20	977.30
81	111,728	979.00	1,084.50	55,403	1,193.50	1,196.60	56,325	768.10	974.30
82	104,010	992.60	1,099.00	50,790	1,214.10	1,217.50	53,220	781.10	985.90
83	90,275	990.30	1,106.40	44,811	1,217.00	1,220.10	45,464	766.80	994.30
84	80,226	975.30	1,098.10	39,588	1,199.50	1,202.60	40,638	756.90	996.30
85–89	268,936	953.50	1,096.60	122,145	1,180.20	1,184.20	146,791	764.90	1,023.70
85	72,450	990.40	1,117.90	34,670	1,219.10	1,222.50	37,780	780.50	1,021.90
86	61,520	953.20	1,092.80	28,290	1,182.10	1,185.70	33,230	758.40	1,013.70
87	52,027	936.30	1,082.10	23,352	1,161.10	1,165.50	28,675	753.30	1,014.30
88	44,632	932.90	1,086.90	19,522	1,153.40	1,157.80	25,110	761.50	1,031.90
89	38,307	931.60	1,093.20	16,311	1,153.30	1,158.60	21,996	767.20	1,044.60
90 or older	134,384	978.40	1,137.30	48,590	1,205.20	1,211.10	85,794	850.00	1,095.60

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

Age	All retired workers			Men			Women		
	Number	Average monthly benefit (dollars)		Number	Average monthly benefit (dollars)		Number	Average monthly benefit (dollars)	
		Before delayed retirement credit	After delayed retirement credit		Before delayed retirement credit	After delayed retirement credit		Before delayed retirement credit	After delayed retirement credit
Total	3,360,332	1,355.70	1,464.40	1,828,595	1,505.90	1,617.60	1,531,737	1,176.40	1,281.50
66-69	194,174	1,459.40	1,551.90	105,638	1,626.40	1,724.60	88,536	1,260.20	1,345.90
66	3,554	1,557.70	1,586.30	2,025	1,748.90	1,779.20	1,529	1,304.60	1,330.70
67	50,645	1,535.30	1,586.80	29,274	1,693.90	1,750.50	21,371	1,318.10	1,362.60
68	70,472	1,456.50	1,546.50	38,250	1,623.20	1,722.20	32,222	1,258.70	1,337.90
69	69,503	1,402.10	1,530.30	36,089	1,568.20	1,703.00	33,414	1,222.70	1,343.70
70-74	373,851	1,215.40	1,403.40	151,350	1,379.00	1,545.90	222,501	1,104.20	1,306.50
70	84,373	1,343.30	1,543.30	38,022	1,531.30	1,724.50	46,351	1,189.10	1,394.60
71	80,668	1,259.40	1,460.70	33,620	1,433.00	1,618.10	47,048	1,135.40	1,348.20
72	74,514	1,202.20	1,386.60	29,312	1,361.50	1,522.30	45,202	1,098.90	1,298.50
73	70,804	1,141.20	1,324.60	26,652	1,279.00	1,430.00	44,152	1,058.00	1,261.10
74	63,492	1,087.90	1,252.20	23,744	1,192.30	1,316.60	39,748	1,025.60	1,213.80
75-79	930,107	1,365.10	1,467.00	534,440	1,525.60	1,624.20	395,667	1,148.20	1,254.70
75	63,021	1,067.00	1,224.40	23,543	1,173.40	1,287.00	39,478	1,003.60	1,187.00
76	219,739	1,405.80	1,471.60	130,776	1,560.20	1,612.50	88,963	1,178.70	1,264.50
77	218,614	1,384.10	1,479.30	128,956	1,538.90	1,631.20	89,658	1,161.40	1,260.80
78	216,599	1,393.20	1,501.60	126,713	1,552.50	1,666.60	89,886	1,168.60	1,269.10
79	212,134	1,363.10	1,486.20	124,452	1,514.80	1,649.70	87,682	1,147.80	1,254.10
80-84	921,969	1,360.30	1,472.70	531,630	1,507.40	1,634.50	390,339	1,160.00	1,252.40
80	207,827	1,354.60	1,475.30	121,823	1,504.20	1,640.80	86,004	1,142.70	1,240.90
81	193,926	1,343.70	1,466.00	112,681	1,487.80	1,626.90	81,245	1,143.70	1,242.90
82	183,608	1,367.50	1,478.00	105,288	1,518.70	1,643.80	78,320	1,164.10	1,255.00
83	174,349	1,375.40	1,485.30	99,563	1,525.50	1,649.10	74,786	1,175.50	1,267.20
84	162,259	1,363.10	1,458.00	92,275	1,502.80	1,609.00	69,984	1,179.00	1,258.90
85-89	603,745	1,343.40	1,433.20	338,139	1,464.50	1,565.30	265,606	1,189.30	1,265.10
85	142,027	1,377.80	1,478.50	79,521	1,523.10	1,635.80	62,506	1,192.90	1,278.30
86	138,269	1,353.90	1,438.30	77,972	1,481.20	1,576.00	60,297	1,189.30	1,260.20
87	121,722	1,332.80	1,419.40	68,739	1,446.90	1,544.30	52,983	1,184.80	1,257.30
88	106,311	1,321.70	1,409.30	59,105	1,428.60	1,527.00	47,206	1,187.80	1,262.00
89	95,416	1,314.90	1,402.80	52,802	1,414.60	1,513.30	42,614	1,191.40	1,265.80
90 or older	336,486	1,434.90	1,507.40	167,398	1,560.20	1,645.80	169,088	1,310.80	1,370.30

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

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	34,593,080	100.0	...	1,175.50	17,582,235	100.0	...	1,323.10	17,010,845	100.0	...	1,022.90
<i>Summary data</i>												
2005–2010	12,496,279	36.1	...	1,208.10	6,503,378	37.0	...	1,384.30	5,992,901	35.2	...	1,016.80
2000–2004	7,640,322	22.1	...	1,198.70	4,039,726	23.0	...	1,367.80	3,600,596	21.2	...	1,008.90
1995–1999	5,763,334	16.7	...	1,135.20	2,995,265	17.0	...	1,271.70	2,768,069	16.3	...	987.50
1990–1994	4,352,622	12.6	...	1,135.30	2,222,211	12.6	...	1,243.00	2,130,411	12.5	...	1,023.10
1985–1989	2,749,637	7.9	...	1,122.30	1,256,468	7.1	...	1,189.30	1,493,169	8.8	...	1,065.90
1980–1984	1,218,651	3.5	...	1,152.70	466,840	2.7	...	1,173.70	751,811	4.4	...	1,139.60
1975–1979	320,602	0.9	...	1,179.90	89,168	0.5	...	1,240.00	231,434	1.4	...	1,156.80
1972–1974	41,086	0.1	...	1,069.80	7,704	^b	...	1,076.10	33,382	0.2	...	1,068.30
Before 1972	10,547	^b	...	1,003.40	1,475	^b	...	980.80	9,072	0.1	...	1,007.10
<i>Single-year data</i>												
2010	2,421,548	7.0	7.0	1,207.20	1,266,300	7.2	7.2	1,382.10	1,155,248	6.8	6.8	1,015.50
2009	2,574,549	7.4	14.4	1,208.30	1,357,222	7.7	14.9	1,383.50	1,217,327	7.2	14.0	1,012.90
2008	2,100,458	6.1	20.5	1,216.20	1,089,387	6.2	21.1	1,396.00	1,011,071	5.9	19.9	1,022.40
2007	1,850,075	5.4	25.9	1,216.20	956,825	5.4	26.5	1,395.80	893,250	5.3	25.2	1,023.90
2006	1,781,078	5.2	31.1	1,207.60	919,046	5.2	31.7	1,385.30	862,032	5.1	30.3	1,018.00
2005	1,768,571	5.1	36.2	1,191.50	914,598	5.2	36.9	1,361.90	853,973	5.0	35.3	1,008.90
2004	1,644,325	4.8	41.0	1,197.50	854,718	4.9	41.8	1,372.80	789,607	4.6	39.9	1,007.70
2003	1,531,613	4.4	45.4	1,206.90	802,806	4.6	46.4	1,382.00	728,807	4.3	44.2	1,014.10
2002	1,510,753	4.4	49.8	1,204.80	799,919	4.6	51.0	1,375.20	710,834	4.2	48.4	1,013.10
2001	1,429,296	4.1	53.9	1,180.00	758,657	4.3	55.3	1,340.20	670,639	3.9	52.3	998.80
2000	1,524,335	4.4	58.3	1,202.90	823,626	4.7	60.0	1,366.90	700,709	4.1	56.4	1,010.10
1999	1,307,717	3.8	62.1	1,157.90	692,279	3.9	63.9	1,307.90	615,438	3.6	60.0	989.10
1998	1,189,178	3.4	65.5	1,130.70	618,661	3.5	67.4	1,271.70	570,517	3.4	63.4	977.80
1997	1,135,885	3.3	68.8	1,127.10	586,113	3.3	70.7	1,263.40	549,772	3.2	66.6	981.70
1996	1,105,855	3.2	72.0	1,126.00	560,652	3.2	73.9	1,253.90	545,203	3.2	69.8	994.50
1995	1,024,699	3.0	75.0	1,130.70	537,560	3.1	77.0	1,252.80	487,139	2.9	72.7	995.90
1994	981,093	2.8	77.8	1,133.90	510,684	2.9	79.9	1,253.10	470,409	2.8	75.5	1,004.40
1993	929,354	2.7	80.5	1,132.90	480,840	2.7	82.6	1,244.40	448,514	2.6	78.1	1,013.30
1992	888,852	2.6	83.1	1,135.20	456,632	2.6	85.2	1,241.40	432,220	2.5	80.6	1,023.10
1991	807,581	2.3	85.4	1,136.20	408,608	2.3	87.5	1,235.80	398,973	2.4	83.0	1,034.20
1990	745,742	2.2	87.6	1,139.50	365,447	2.1	89.6	1,236.90	380,295	2.2	85.2	1,045.90
1989	673,355	2.0	89.6	1,130.50	322,033	1.8	91.4	1,217.00	351,322	2.1	87.3	1,051.20
1988	606,261	1.8	91.4	1,121.50	281,988	1.6	93.0	1,196.70	324,273	1.9	89.2	1,056.10
1987	551,592	1.6	93.0	1,124.00	250,081	1.4	94.4	1,191.20	301,511	1.8	91.0	1,068.30
1986	498,557	1.4	94.4	1,118.00	221,870	1.3	95.7	1,170.50	276,687	1.6	92.6	1,075.80
1985	419,872	1.2	95.6	1,113.10	180,496	1.0	96.7	1,148.60	239,376	1.4	94.0	1,086.30
1984	345,609	1.0	96.6	1,114.50	142,059	0.8	97.5	1,136.30	203,550	1.2	95.2	1,099.30
1983	298,291	0.9	97.5	1,136.20	118,475	0.7	98.2	1,151.50	179,816	1.1	96.3	1,126.10
1982	239,830	0.7	98.2	1,153.70	90,710	0.5	98.7	1,165.50	149,120	0.9	97.2	1,146.40
1981	186,102	0.5	98.7	1,200.10	66,695	0.4	99.1	1,234.50	119,407	0.7	97.9	1,180.90
1980	148,819	0.4	99.1	1,213.30	48,901	0.3	99.4	1,268.40	99,918	0.6	98.5	1,186.40
1979	110,872	0.3	99.4	1,216.70	33,819	0.2	99.6	1,285.60	77,053	0.5	99.0	1,186.50
1978	79,806	0.2	99.6	1,194.80	22,419	0.1	99.7	1,253.20	57,387	0.3	99.3	1,171.90
1977	54,945	0.2	99.8	1,162.00	15,135	0.1	99.8	1,219.60	39,810	0.2	99.5	1,140.10
1976	44,715	0.1	99.9	1,134.30	10,908	0.1	99.9	1,172.10	33,807	0.2	99.7	1,122.10
1975	30,264	0.1	100.0	1,106.10	6,887	^b	100.0	1,125.70	23,377	0.1	99.8	1,100.30

(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 2010—Continued

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)
<i>Single-year data (cont.)</i>												
1974	20,342	0.1	100.0	1,085.90	4,155	^b	100.0	1,088.40	16,187	0.1	99.9	1,085.30
1973	12,971	^b	100.0	1,059.60	2,309	^b	100.0	1,068.80	10,662	0.1	100.0	1,057.60
1972	7,773	^b	100.0	1,044.70	1,240	^b	100.0	1,048.50	6,533	^b	100.0	1,044.00

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

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

. . . = not applicable.

a. Represents those entitled in specified year or later.

b. Less than 0.05 percent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B5—Number, average age, and percentage distribution, by sex and age, December 1940–2010, selected years

Year	Number (thousands)	Average age	Percentage distribution							
			Total, 62 or older	62–64	65–69	70–74	75–79	80–84	85 or older	
<i>Men</i>										
1940	99	68.8	100.0	...	74.4	17.4	6.4	1.6	0.2	
1945	447	71.7	100.0	...	39.9	40.2	15.1	4.0	0.7	
1950	1,469	72.2	100.0	...	39.1	33.7	20.2	5.9	1.2	
1955	3,252	72.7	100.0	...	35.7	34.8	20.0	7.6	1.9	
1960	5,217	73.2	100.0	...	33.8	33.1	21.1	9.0	3.1	
1965	6,825	72.9	100.0	6.9	29.7	29.5	19.9	9.9	4.1	
1970	7,688	72.6	100.0	7.5	30.1	26.9	19.6	10.6	5.3	
1975	9,163	72.3	100.0	9.3	32.2	25.6	17.1	10.1	5.7	
1980	10,461	72.2	100.0	9.5	32.1	25.8	16.9	9.5	6.1	
1985	11,817	72.3	100.0	10.9	30.2	25.9	17.3	9.6	6.1	
1986	12,080	72.4	100.0	10.9	30.3	25.7	17.3	9.7	6.1	
1987	12,295	72.4	100.0	10.9	30.2	25.5	17.4	9.9	6.1	
1988	12,483	72.4	100.0	10.7	30.0	25.5	17.6	10.0	6.2	
1989	12,718	72.5	100.0	10.5	30.1	25.2	17.8	10.1	6.3	
1990	12,985	72.5	100.0	10.3	30.0	25.3	17.8	10.2	6.4	
1991	13,227	72.6	100.0	10.2	29.5	25.7	17.9	10.3	6.4	
1992	13,474	72.7	100.0	10.0	29.2	25.8	17.8	10.5	6.6	
1993	13,649	72.8	100.0	9.9	28.9	25.9	17.9	10.7	6.8	
1994	13,795	72.8	100.0	9.8	28.3	26.2	17.9	10.9	6.9	
1995	13,915	72.9	100.0	9.5	28.0	26.1	18.3	11.1	7.0	
1996	14,012	73.1	100.0	9.2	27.6	25.8	18.9	11.3	7.2	
1997	14,126	73.2	100.0	9.0	27.2	25.8	19.2	11.4	7.4	
1998	14,206	73.3	100.0	9.0	26.6	25.6	19.5	11.6	7.6	
1999	14,329	73.3	100.0	9.1	26.4	25.2	19.8	11.7	7.8	
2000	14,772	73.2	100.0	9.0	27.6	24.6	19.3	11.7	7.8	
2001	14,930	73.3	100.0	8.9	27.6	24.3	19.1	12.1	7.9	
2002	15,070	73.3	100.0	8.8	27.9	24.0	19.1	12.4	7.8	
2003	15,254	73.3	100.0	8.7	27.9	23.5	19.0	12.6	8.2	
2004	15,438	73.4	100.0	8.9	27.7	23.4	18.8	12.8	8.4	
2005	15,654	73.4	100.0	9.1	27.4	23.2	18.7	12.8	8.7	
2006	15,869	73.5	100.0	9.0	27.5	23.2	18.5	12.8	9.1	
2007	16,112	73.5	100.0	8.5	27.8	23.3	18.3	12.8	9.3	
2008	16,456	73.5	100.0	8.3	28.0	23.6	17.9	12.7	9.5	
2009	17,067	73.4	100.0	9.1	28.2	23.3	17.5	12.4	9.6	
2010	17,582	73.4	100.0	9.7	28.0	23.3	17.1	12.2	9.6	

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B5—Number, average age, and percentage distribution, by sex and age, December 1940–2010, 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	
<i>Women</i>										
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	
2004	14,534	74.5	100.0	9.0	24.4	20.9	18.1	14.1	13.4	
2005	14,821	74.5	100.0	9.4	24.4	20.8	17.8	14.1	13.5	
2006	15,107	74.5	100.0	9.4	24.8	20.9	17.5	13.9	13.7	
2007	15,416	74.5	100.0	9.0	25.3	21.1	17.2	13.7	13.8	
2008	15,818	74.4	100.0	8.9	25.8	21.5	16.7	13.5	13.7	
2009	16,447	74.2	100.0	9.6	26.1	21.4	16.3	12.9	13.6	
2010	17,011	74.1	100.0	10.2	26.0	21.5	16.1	12.6	13.5	

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1988 and 1990–2005 are based on a 10 percent sample. All other years are 100 percent data.

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

... = not applicable.

a. Less than 0.05 percent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B6—Number and percentage distribution with and without reduction for early retirement, by sex and monthly benefit, December 2010

Sex and monthly benefit (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	34,593,080	100.0	25,555,808	100.0	9,037,272	100.0
Less than 400.00	1,560,880	4.5	1,239,040	4.8	321,840	3.6
400.00–449.90	360,512	1.0	282,528	1.1	77,984	0.9
450.00–499.90	447,233	1.3	376,079	1.5	71,154	0.8
500.00–549.90	660,652	1.9	580,267	2.3	80,385	0.9
550.00–599.90	849,221	2.5	727,865	2.8	121,356	1.3
600.00–649.90	1,068,648	3.1	922,608	3.6	146,040	1.6
650.00–699.90	1,199,260	3.5	1,018,774	4.0	180,486	2.0
700.00–749.90	1,235,123	3.6	1,031,166	4.0	203,957	2.3
750.00–799.90	1,242,323	3.6	1,019,259	4.0	223,064	2.5
800.00–849.90	1,203,581	3.5	966,531	3.8	237,050	2.6
850.00–899.90	1,133,566	3.3	888,116	3.5	245,450	2.7
900.00–949.90	1,102,397	3.2	852,543	3.3	249,854	2.8
950.00–999.90	1,096,628	3.2	847,712	3.3	248,916	2.8
1,000.00–1,049.90	1,117,663	3.2	863,628	3.4	254,035	2.8
1,050.00–1,099.90	1,152,193	3.3	890,775	3.5	261,418	2.9
1,100.00–1,149.90	1,200,584	3.5	936,377	3.7	264,207	2.9
1,150.00–1,199.90	1,250,456	3.6	983,527	3.8	266,929	3.0
1,200.00–1,249.90	1,265,064	3.7	1,001,932	3.9	263,132	2.9
1,250.00–1,299.90	1,392,523	4.0	1,124,594	4.4	267,929	3.0
1,300.00–1,349.90	1,406,409	4.1	1,135,745	4.4	270,664	3.0
1,350.00–1,399.90	1,279,713	3.7	1,012,469	4.0	267,244	3.0
1,400.00–1,449.90	1,309,463	3.8	1,036,738	4.1	272,725	3.0
1,450.00–1,499.90	1,268,707	3.7	989,844	3.9	278,863	3.1
1,500.00–1,549.90	1,181,019	3.4	898,005	3.5	283,014	3.1
1,550.00–1,599.90	1,116,678	3.2	805,770	3.2	310,908	3.4
1,600.00–1,649.90	1,021,675	3.0	701,536	2.7	320,139	3.5
1,650.00–1,699.90	842,061	2.4	550,723	2.2	291,338	3.2
1,700.00–1,749.90	685,668	2.0	407,344	1.6	278,324	3.1
1,750.00–1,799.90	569,883	1.6	310,799	1.2	259,084	2.9
1,800.00–1,849.90	495,216	1.4	249,370	1.0	245,846	2.7
1,850.00–1,899.90	458,411	1.3	199,664	0.8	258,747	2.9
1,900.00–1,949.90	392,585	1.1	161,056	0.6	231,529	2.6
1,950.00–1,999.90	336,460	1.0	130,614	0.5	205,846	2.3
2,000.00 or more	1,690,625	4.9	412,810	1.6	1,277,815	14.1
Average benefit (dollars)	1,175.50		1,100.70		1,386.80	

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B6—Number and percentage distribution with and without reduction for early retirement, by sex and monthly benefit, December 2010—Continued

Sex and monthly benefit (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Men	17,582,235	100.0	12,556,581	100.0	5,025,654	100.0
Less than 400.00	750,487	4.3	587,589	4.7	162,898	3.2
400.00–449.90	147,028	0.8	110,960	0.9	36,068	0.7
450.00–499.90	164,212	0.9	132,600	1.1	31,612	0.6
500.00–549.90	218,235	1.2	184,942	1.5	33,293	0.7
550.00–599.90	253,155	1.4	206,400	1.6	46,755	0.9
600.00–649.90	274,033	1.6	219,968	1.8	54,065	1.1
650.00–699.90	290,631	1.7	227,486	1.8	63,145	1.3
700.00–749.90	305,481	1.7	238,321	1.9	67,160	1.3
750.00–799.90	320,803	1.8	251,202	2.0	69,601	1.4
800.00–849.90	339,448	1.9	267,216	2.1	72,232	1.4
850.00–899.90	360,242	2.0	285,247	2.3	74,995	1.5
900.00–949.90	387,021	2.2	308,585	2.5	78,436	1.6
950.00–999.90	418,000	2.4	336,805	2.7	81,195	1.6
1,000.00–1,049.90	457,048	2.6	370,244	2.9	86,804	1.7
1,050.00–1,099.90	501,821	2.9	409,637	3.3	92,184	1.8
1,100.00–1,149.90	561,679	3.2	464,662	3.7	97,017	1.9
1,150.00–1,199.90	618,496	3.5	515,303	4.1	103,193	2.1
1,200.00–1,249.90	663,243	3.8	553,790	4.4	109,453	2.2
1,250.00–1,299.90	800,479	4.6	683,625	5.4	116,854	2.3
1,300.00–1,349.90	836,203	4.8	711,695	5.7	124,508	2.5
1,350.00–1,399.90	781,538	4.4	649,296	5.2	132,242	2.6
1,400.00–1,449.90	836,543	4.8	690,293	5.5	146,250	2.9
1,450.00–1,499.90	839,750	4.8	678,629	5.4	161,121	3.2
1,500.00–1,549.90	806,378	4.6	633,225	5.0	173,153	3.4
1,550.00–1,599.90	779,157	4.4	576,536	4.6	202,621	4.0
1,600.00–1,649.90	728,092	4.1	510,818	4.1	217,274	4.3
1,650.00–1,699.90	612,446	3.5	409,344	3.3	203,102	4.0
1,700.00–1,749.90	494,338	2.8	294,030	2.3	200,308	4.0
1,750.00–1,799.90	410,435	2.3	220,538	1.8	189,897	3.8
1,800.00–1,849.90	359,398	2.0	176,740	1.4	182,658	3.6
1,850.00–1,899.90	337,983	1.9	142,729	1.1	195,254	3.9
1,900.00–1,949.90	295,316	1.7	117,161	0.9	178,155	3.5
1,950.00–1,999.90	258,308	1.5	96,870	0.8	161,438	3.2
2,000.00 or more	1,374,808	7.8	294,095	2.3	1,080,713	21.5
Average benefit (dollars)	1,323.10		1,231.10		1,552.70	

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B6—Number and percentage distribution with and without reduction for early retirement, by sex and monthly benefit, December 2010—Continued

Sex and monthly benefit (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	17,010,845	100.0	12,999,227	100.0	4,011,618	100.0
Less than 400.00	810,393	4.8	651,451	5.0	158,942	4.0
400.00–449.90	213,484	1.3	171,568	1.3	41,916	1.0
450.00–499.90	283,021	1.7	243,479	1.9	39,542	1.0
500.00–549.90	442,417	2.6	395,325	3.0	47,092	1.2
550.00–599.90	596,066	3.5	521,465	4.0	74,601	1.9
600.00–649.90	794,615	4.7	702,640	5.4	91,975	2.3
650.00–699.90	908,629	5.3	791,288	6.1	117,341	2.9
700.00–749.90	929,642	5.5	792,845	6.1	136,797	3.4
750.00–799.90	921,520	5.4	768,057	5.9	153,463	3.8
800.00–849.90	864,133	5.1	699,315	5.4	164,818	4.1
850.00–899.90	773,324	4.5	602,869	4.6	170,455	4.2
900.00–949.90	715,376	4.2	543,958	4.2	171,418	4.3
950.00–999.90	678,628	4.0	510,907	3.9	167,721	4.2
1,000.00–1,049.90	660,615	3.9	493,384	3.8	167,231	4.2
1,050.00–1,099.90	650,372	3.8	481,138	3.7	169,234	4.2
1,100.00–1,149.90	638,905	3.8	471,715	3.6	167,190	4.2
1,150.00–1,199.90	631,960	3.7	468,224	3.6	163,736	4.1
1,200.00–1,249.90	601,821	3.5	448,142	3.4	153,679	3.8
1,250.00–1,299.90	592,044	3.5	440,969	3.4	151,075	3.8
1,300.00–1,349.90	570,206	3.4	424,050	3.3	146,156	3.6
1,350.00–1,399.90	498,175	2.9	363,173	2.8	135,002	3.4
1,400.00–1,449.90	472,920	2.8	346,445	2.7	126,475	3.2
1,450.00–1,499.90	428,957	2.5	311,215	2.4	117,742	2.9
1,500.00–1,549.90	374,641	2.2	264,780	2.0	109,861	2.7
1,550.00–1,599.90	337,521	2.0	229,234	1.8	108,287	2.7
1,600.00–1,649.90	293,583	1.7	190,718	1.5	102,865	2.6
1,650.00–1,699.90	229,615	1.3	141,379	1.1	88,236	2.2
1,700.00–1,749.90	191,330	1.1	113,314	0.9	78,016	1.9
1,750.00–1,799.90	159,448	0.9	90,261	0.7	69,187	1.7
1,800.00–1,849.90	135,818	0.8	72,630	0.6	63,188	1.6
1,850.00–1,899.90	120,428	0.7	56,935	0.4	63,493	1.6
1,900.00–1,949.90	97,269	0.6	43,895	0.3	53,374	1.3
1,950.00–1,999.90	78,152	0.5	33,744	0.3	44,408	1.1
2,000.00 or more	315,817	1.9	118,715	0.9	197,102	4.9
Average benefit (dollars)	1,022.90		974.80		1,178.90	

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B7—Number and percentage distribution with and without reduction for early retirement, by sex and primary insurance amount, December 2010

Sex and primary insurance amount (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	34,593,080	100.0	25,555,808	100.0	9,037,272	100.0
Less than 400.00	2,332,789	6.7	1,857,416	7.3	475,373	5.3
400.00–449.90	587,564	1.7	467,378	1.8	120,186	1.3
450.00–499.90	521,701	1.5	418,328	1.6	103,373	1.1
500.00–549.90	568,488	1.6	451,593	1.8	116,895	1.3
550.00–599.90	825,888	2.4	635,355	2.5	190,533	2.1
600.00–649.90	900,404	2.6	687,462	2.7	212,942	2.4
650.00–699.90	1,103,930	3.2	859,348	3.4	244,582	2.7
700.00–749.90	1,133,904	3.3	882,677	3.5	251,227	2.8
750.00–799.90	1,128,662	3.3	877,084	3.4	251,578	2.8
800.00–849.90	1,074,520	3.1	823,166	3.2	251,354	2.8
850.00–899.90	1,046,928	3.0	794,880	3.1	252,048	2.8
900.00–949.90	1,019,817	2.9	767,532	3.0	252,285	2.8
950.00–999.90	988,034	2.9	737,933	2.9	250,101	2.8
1,000.00–1,049.90	973,056	2.8	720,622	2.8	252,434	2.8
1,050.00–1,099.90	953,275	2.8	700,989	2.7	252,286	2.8
1,100.00–1,149.90	933,390	2.7	684,561	2.7	248,829	2.8
1,150.00–1,199.90	920,983	2.7	675,084	2.6	245,899	2.7
1,200.00–1,249.90	905,827	2.6	662,255	2.6	243,572	2.7
1,250.00–1,299.90	904,403	2.6	662,744	2.6	241,659	2.7
1,300.00–1,349.90	906,932	2.6	665,551	2.6	241,381	2.7
1,350.00–1,399.90	909,042	2.6	669,949	2.6	239,093	2.6
1,400.00–1,449.90	948,279	2.7	699,232	2.7	249,047	2.8
1,450.00–1,499.90	968,371	2.8	707,195	2.8	261,176	2.9
1,500.00–1,549.90	975,538	2.8	704,939	2.8	270,599	3.0
1,550.00–1,599.90	1,119,327	3.2	806,032	3.2	313,295	3.5
1,600.00–1,649.90	1,160,316	3.4	836,918	3.3	323,398	3.6
1,650.00–1,699.90	1,015,415	2.9	729,926	2.9	285,489	3.2
1,700.00–1,749.90	899,866	2.6	626,781	2.5	273,085	3.0
1,750.00–1,799.90	803,291	2.3	545,844	2.1	257,447	2.8
1,800.00–1,849.90	752,543	2.2	513,922	2.0	238,621	2.6
1,850.00–1,899.90	852,284	2.5	602,549	2.4	249,735	2.8
1,900.00–1,949.90	792,082	2.3	582,636	2.3	209,446	2.3
1,950.00–1,999.90	699,245	2.0	521,131	2.0	178,114	2.0
2,000.00 or more	2,966,986	8.6	1,976,796	7.7	990,190	11.0
Average primary insurance amount (dollars)	1,224.50		1,198.30		1,298.60	

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B7—Number and percentage distribution with and without reduction for early retirement, by sex and primary insurance amount, December 2010—Continued

Sex and primary insurance amount (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Men	17,582,235	100.0	12,556,581	100.0	5,025,654	100.0
Less than 400.00	609,451	3.5	435,998	3.5	173,453	3.5
400.00–449.90	135,539	0.8	97,732	0.8	37,807	0.8
450.00–499.90	124,200	0.7	91,811	0.7	32,389	0.6
500.00–549.90	128,389	0.7	93,609	0.7	34,780	0.7
550.00–599.90	167,333	1.0	115,962	0.9	51,371	1.0
600.00–649.90	184,742	1.1	127,070	1.0	57,672	1.1
650.00–699.90	233,856	1.3	167,270	1.3	66,586	1.3
700.00–749.90	251,784	1.4	182,330	1.5	69,454	1.4
750.00–799.90	258,790	1.5	188,515	1.5	70,275	1.4
800.00–849.90	261,527	1.5	188,167	1.5	73,360	1.5
850.00–899.90	270,743	1.5	195,336	1.6	75,407	1.5
900.00–949.90	282,372	1.6	203,802	1.6	78,570	1.6
950.00–999.90	295,324	1.7	213,370	1.7	81,954	1.6
1,000.00–1,049.90	314,992	1.8	227,408	1.8	87,584	1.7
1,050.00–1,099.90	336,247	1.9	243,251	1.9	92,996	1.9
1,100.00–1,149.90	359,456	2.0	261,189	2.1	98,267	2.0
1,150.00–1,199.90	386,689	2.2	281,952	2.2	104,737	2.1
1,200.00–1,249.90	416,123	2.4	304,272	2.4	111,851	2.2
1,250.00–1,299.90	452,682	2.6	333,537	2.7	119,145	2.4
1,300.00–1,349.90	494,034	2.8	365,614	2.9	128,420	2.6
1,350.00–1,399.90	538,506	3.1	401,238	3.2	137,268	2.7
1,400.00–1,449.90	609,486	3.5	455,438	3.6	154,048	3.1
1,450.00–1,499.90	662,449	3.8	489,010	3.9	173,439	3.5
1,500.00–1,549.90	700,109	4.0	510,096	4.1	190,013	3.8
1,550.00–1,599.90	851,460	4.8	620,706	4.9	230,754	4.6
1,600.00–1,649.90	917,641	5.2	670,996	5.3	246,645	4.9
1,650.00–1,699.90	814,734	4.6	591,536	4.7	223,198	4.4
1,700.00–1,749.90	726,015	4.1	507,159	4.0	218,856	4.4
1,750.00–1,799.90	646,841	3.7	437,187	3.5	209,654	4.2
1,800.00–1,849.90	603,917	3.4	409,726	3.3	194,191	3.9
1,850.00–1,899.90	679,313	3.9	476,570	3.8	202,743	4.0
1,900.00–1,949.90	641,638	3.6	470,333	3.7	171,305	3.4
1,950.00–1,999.90	580,436	3.3	433,074	3.4	147,362	2.9
2,000.00 or more	2,645,417	15.0	1,765,317	14.1	880,100	17.5
Average primary insurance amount (dollars)	1,484.50		1,473.50		1,512.10	

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B7—Number and percentage distribution with and without reduction for early retirement, by sex and primary insurance amount, December 2010—Continued

Sex and primary insurance amount (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	17,010,845	100.0	12,999,227	100.0	4,011,618	100.0
Less than 400.00	1,723,338	10.1	1,421,418	10.9	301,920	7.5
400.00–449.90	452,025	2.7	369,646	2.8	82,379	2.1
450.00–499.90	397,501	2.3	326,517	2.5	70,984	1.8
500.00–549.90	440,099	2.6	357,984	2.8	82,115	2.0
550.00–599.90	658,555	3.9	519,393	4.0	139,162	3.5
600.00–649.90	715,662	4.2	560,392	4.3	155,270	3.9
650.00–699.90	870,074	5.1	692,078	5.3	177,996	4.4
700.00–749.90	882,120	5.2	700,347	5.4	181,773	4.5
750.00–799.90	869,872	5.1	688,569	5.3	181,303	4.5
800.00–849.90	812,993	4.8	634,999	4.9	177,994	4.4
850.00–899.90	776,185	4.6	599,544	4.6	176,641	4.4
900.00–949.90	737,445	4.3	563,730	4.3	173,715	4.3
950.00–999.90	692,710	4.1	524,563	4.0	168,147	4.2
1,000.00–1,049.90	658,064	3.9	493,214	3.8	164,850	4.1
1,050.00–1,099.90	617,028	3.6	457,738	3.5	159,290	4.0
1,100.00–1,149.90	573,934	3.4	423,372	3.3	150,562	3.8
1,150.00–1,199.90	534,294	3.1	393,132	3.0	141,162	3.5
1,200.00–1,249.90	489,704	2.9	357,983	2.8	131,721	3.3
1,250.00–1,299.90	451,721	2.7	329,207	2.5	122,514	3.1
1,300.00–1,349.90	412,898	2.4	299,937	2.3	112,961	2.8
1,350.00–1,399.90	370,536	2.2	268,711	2.1	101,825	2.5
1,400.00–1,449.90	338,793	2.0	243,794	1.9	94,999	2.4
1,450.00–1,499.90	305,922	1.8	218,185	1.7	87,737	2.2
1,500.00–1,549.90	275,429	1.6	194,843	1.5	80,586	2.0
1,550.00–1,599.90	267,867	1.6	185,326	1.4	82,541	2.1
1,600.00–1,649.90	242,675	1.4	165,922	1.3	76,753	1.9
1,650.00–1,699.90	200,681	1.2	138,390	1.1	62,291	1.6
1,700.00–1,749.90	173,851	1.0	119,622	0.9	54,229	1.4
1,750.00–1,799.90	156,450	0.9	108,657	0.8	47,793	1.2
1,800.00–1,849.90	148,626	0.9	104,196	0.8	44,430	1.1
1,850.00–1,899.90	172,971	1.0	125,979	1.0	46,992	1.2
1,900.00–1,949.90	150,444	0.9	112,303	0.9	38,141	1.0
1,950.00–1,999.90	118,809	0.7	88,057	0.7	30,752	0.8
2,000.00 or more	321,569	1.9	211,479	1.6	110,090	2.7
Average primary insurance amount (dollars)	955.70		932.40		1,031.30	

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 1956–2010, selected years

Year	All retired workers				Men				Women			
	Total	With reduction for early retirement	Without reduction for early retirement	Early retirees as a percentage of total	Subtotal	With reduction for early retirement	Without reduction for early retirement	Early retirees as a percentage of subtotal	Subtotal	With reduction for early retirement	Without reduction for early retirement	Early retirees as a percentage of subtotal
<i>Number</i>												
1956	5,112,430	115,029	4,997,401	2.2	3,572,271	...	3,572,271	...	1,540,159	115,029	1,425,130	7.5
1960	8,061,469	949,204	7,112,265	11.8	5,216,668	...	5,216,668	...	2,844,801	949,204	1,895,597	33.4
1965	11,100,584	3,519,198	7,581,386	31.7	6,825,078	1,435,912	5,389,166	21.0	4,275,506	2,083,286	2,192,220	48.7
1970	13,349,175	6,066,880	7,282,295	45.4	7,688,460	2,758,060	4,930,400	35.9	5,660,715	3,308,820	2,351,895	58.5
1980	19,562,085	12,164,887	7,397,198	62.2	10,460,735	5,874,196	4,586,539	54.8	9,101,350	6,290,691	2,810,659	69.1
1985	22,431,930	14,710,971	7,720,959	65.6	11,816,956	7,161,479	4,655,477	60.6	10,614,974	7,549,492	3,065,482	71.1
1990	24,838,100	16,997,861	7,840,239	68.4	12,983,832	8,390,921	4,592,911	64.6	11,854,268	8,606,940	3,247,328	72.6
1995	26,672,806	18,731,443	7,941,363	70.2	13,913,531	9,353,996	4,559,535	67.2	12,759,275	9,377,447	3,381,828	73.5
1996	26,898,072	19,113,994	7,784,078	71.1	14,010,875	9,532,310	4,478,565	68.0	12,887,197	9,581,684	3,305,513	74.4
1997	27,274,572	19,601,286	7,673,286	71.9	14,116,818	9,745,315	4,371,503	69.0	13,157,754	9,855,971	3,301,783	74.9
1998	27,510,535	19,810,871	7,699,664	72.0	14,200,826	9,828,931	4,371,895	69.2	13,309,709	9,981,940	3,327,769	75.0
1999	27,774,677	20,035,120	7,739,557	72.1	14,321,468	9,935,547	4,385,921	69.4	13,453,209	10,099,573	3,353,636	75.1
2000	28,498,945	20,319,520	8,179,425	71.3	14,767,170	10,076,518	4,690,652	68.2	13,731,775	10,243,002	3,488,773	74.6
2001	28,836,774	20,573,931	8,262,843	71.3	14,930,081	10,210,581	4,719,500	68.4	13,906,693	10,363,350	3,543,340	74.5
2002	29,190,137	20,883,715	8,306,422	71.5	15,100,473	10,364,188	4,736,285	68.8	14,089,664	10,519,527	3,570,137	74.7
2003	29,531,611	21,239,589	8,292,022	71.9	15,247,841	10,542,626	4,705,215	69.1	14,283,770	10,696,963	3,586,807	74.9
2004	29,952,465	21,636,057	8,316,408	72.2	15,430,360	10,749,558	4,680,802	69.7	14,522,105	10,886,499	3,635,606	75.0
2005	30,460,836	22,129,099	8,331,737	72.6	15,650,611	10,981,621	4,668,990	70.2	14,810,225	11,147,478	3,662,747	75.3
2006	30,976,143	22,597,344	8,378,799	73.0	15,869,182	11,196,443	4,672,739	70.6	15,106,961	11,400,901	3,706,060	75.5
2007	31,527,728	23,078,917	8,448,811	73.2	16,111,553	11,413,127	4,698,426	70.8	15,416,175	11,665,790	3,750,385	75.7
2008	32,273,651	23,775,246	8,498,405	73.7	16,455,822	11,708,571	4,747,251	71.2	15,817,829	12,066,675	3,751,154	76.3
2009	33,514,013	24,748,391	8,765,622	73.8	17,067,434	12,182,366	4,885,068	71.4	16,466,579	12,566,025	3,880,554	76.4
2010	34,593,080	25,555,808	9,037,272	73.9	17,582,235	12,556,581	5,025,654	71.4	17,010,845	12,999,227	4,011,618	76.4
<i>Average monthly benefit (dollars)</i>												
1956	63.10	48.20	63.40	...	68.20	...	68.20	...	51.20	48.20	51.40	...
1960	74.00	55.80	76.50	...	81.90	...	81.90	...	59.70	55.80	61.60	...
1965	83.90	70.60	90.10	...	92.60	79.40	96.10	...	70.10	64.50	75.40	...
1970	118.10	103.60	130.20	...	130.50	115.30	139.10	...	101.20	93.80	111.70	...
1980	341.40	310.70	391.80	...	380.20	349.50	419.60	...	296.80	274.60	346.50	...
1985	478.60	424.80	581.20	...	538.40	480.50	627.50	...	412.10	372.00	511.00	...
1990	602.60	537.90	742.80	...	679.30	611.20	803.60	...	518.60	466.40	656.80	...
1995	719.80	649.50	885.60	...	810.20	735.40	963.70	...	621.20	563.80	780.40	...
1996	745.00	678.30	908.70	...	838.10	763.10	997.80	...	643.70	593.90	788.00	...
1997	765.00	705.90	915.90	...	860.50	786.60	1,025.10	...	662.50	626.10	771.30	...
1998	779.70	720.30	932.50	...	876.90	802.40	1,044.50	...	675.90	639.50	785.40	...
1999	804.30	744.40	959.20	...	904.60	829.30	1,075.30	...	697.50	661.00	807.50	...
2000	844.50	778.50	1,008.40	...	951.10	867.20	1,131.10	...	729.90	691.20	843.40	...
2001	874.40	808.50	1,038.70	...	984.60	900.70	1,166.00	...	756.20	717.60	869.20	...
2002	895.00	829.80	1,058.90	...	1,007.80	925.20	1,188.50	...	774.10	735.80	886.90	...
2003	922.10	857.80	1,086.80	...	1,038.70	957.50	1,220.60	...	797.60	759.50	911.30	...
2004	954.90	891.10	1,121.00	...	1,076.10	995.40	1,261.50	...	826.10	788.00	940.10	...
2005	1,002.00	936.90	1,174.80	...	1,129.50	1,047.40	1,322.70	...	867.30	828.20	986.40	...
2006	1,044.40	978.20	1,222.90	...	1,177.50	1,094.10	1,377.20	...	904.60	864.40	1,028.50	...
2007	1,078.60	1,011.30	1,262.30	...	1,215.70	1,131.20	1,421.10	...	935.20	894.00	1,063.30	...
2008	1,152.90	1,080.80	1,354.60	...	1,299.10	1,209.80	1,519.50	...	1,000.70	955.60	1,145.80	...
2009	1,164.30	1,091.10	1,371.10	...	1,311.70	1,221.40	1,536.80	...	1,011.40	964.70	1,162.50	...
2010	1,175.50	1,100.70	1,386.80	...	1,323.10	1,231.10	1,552.70	...	1,022.90	974.80	1,178.90	...

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

NOTE: ... = not applicable.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B9—Number and percentage distribution, by sex, monthly benefit, and age, December 2010

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)	34,593	3,432	9,360	7,766	5,749	4,290	2,636	1,360
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00	4.5	6.8	4.6	4.4	4.5	3.8	3.5	2.9
400.00–449.90	1.0	1.4	1.0	0.9	1.0	1.0	1.1	1.4
450.00–499.90	1.3	1.5	1.1	1.1	1.5	1.6	1.5	1.3
500.00–549.90	1.9	3.0	1.8	1.6	1.9	1.9	1.9	1.6
550.00–599.90	2.5	3.6	2.2	2.1	2.5	2.7	2.7	1.9
600.00–649.90	3.1	3.9	2.6	2.8	3.7	3.7	2.9	2.3
650.00–699.90	3.5	4.2	3.2	3.6	4.1	3.3	2.7	2.3
700.00–749.90	3.6	5.0	3.8	3.6	3.4	3.0	2.7	2.4
750.00–799.90	3.6	5.1	4.0	3.5	3.3	3.0	2.7	2.5
800.00–849.90	3.5	4.9	3.8	3.4	3.3	3.0	2.7	2.6
850.00–899.90	3.3	4.1	3.4	3.2	3.2	3.0	2.8	2.8
900.00–949.90	3.2	3.4	3.3	3.1	3.2	3.0	3.0	3.2
950.00–999.90	3.2	3.2	3.2	3.1	3.2	3.1	3.2	3.7
1,000.00–1,049.90	3.2	3.1	3.1	3.0	3.2	3.3	3.7	4.4
1,050.00–1,099.90	3.3	3.0	3.0	3.0	3.3	3.6	4.3	5.2
1,100.00–1,149.90	3.5	3.0	3.0	3.0	3.4	3.9	5.2	6.3
1,150.00–1,199.90	3.6	2.9	2.9	3.0	3.6	4.4	6.8	5.7
1,200.00–1,249.90	3.7	2.8	2.8	3.0	3.7	5.0	6.7	5.2
1,250.00–1,299.90	4.0	2.7	2.7	3.1	4.9	7.1	5.9	4.8
1,300.00–1,349.90	4.1	2.6	2.7	3.3	6.0	6.5	4.6	4.5
1,350.00–1,399.90	3.7	2.5	2.8	3.5	5.6	4.2	3.7	3.8
1,400.00–1,449.90	3.8	3.6	3.6	4.1	4.3	3.2	3.5	3.5
1,450.00–1,499.90	3.7	4.4	3.7	4.2	3.0	3.0	3.5	3.4
1,500.00–1,549.90	3.4	4.2	3.6	3.9	2.5	2.8	3.3	3.2
1,550.00–1,599.90	3.2	3.7	3.5	3.5	2.6	3.0	2.9	2.8
1,600.00–1,649.90	3.0	3.3	3.3	3.1	2.6	2.6	2.4	2.9
1,650.00–1,699.90	2.4	2.8	2.8	2.6	2.2	2.0	1.8	2.0
1,700.00 or more	13.4	5.1	18.8	17.1	10.4	9.3	8.2	11.6
Average benefit (dollars)	1,175.50	1,035.00	1,224.50	1,218.60	1,142.00	1,151.30	1,153.20	1,206.60
<i>Men</i>								
Total								
Number (thousands)	17,582	1,698	4,930	4,100	3,011	2,151	1,196	497
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00	4.3	6.0	4.3	4.2	4.4	3.5	3.4	3.2
400.00–449.90	0.8	1.1	0.8	0.8	0.8	0.8	0.9	1.3
450.00–499.90	0.9	1.0	0.8	0.8	1.1	1.2	1.2	1.2
500.00–549.90	1.2	1.9	1.2	1.0	1.2	1.3	1.4	1.3
550.00–599.90	1.4	2.3	1.3	1.2	1.4	1.5	1.6	1.5
600.00–649.90	1.6	2.3	1.4	1.3	1.5	1.6	1.7	1.6
650.00–699.90	1.7	2.3	1.6	1.5	1.6	1.7	1.7	1.6
700.00–749.90	1.7	2.3	1.7	1.6	1.7	1.8	1.8	1.7
750.00–799.90	1.8	2.4	1.7	1.6	1.8	1.9	1.9	1.9
800.00–849.90	1.9	2.5	1.8	1.7	2.0	2.0	2.0	2.0
850.00–899.90	2.0	2.6	1.9	1.8	2.1	2.2	2.2	2.3
900.00–949.90	2.2	2.7	2.0	1.9	2.4	2.4	2.5	2.6
950.00–999.90	2.4	2.8	2.1	2.1	2.6	2.7	2.8	3.0
1,000.00–1,049.90	2.6	2.9	2.2	2.2	2.8	3.0	3.3	3.8
1,050.00–1,099.90	2.9	3.0	2.3	2.4	3.1	3.3	4.0	4.9
1,100.00–1,149.90	3.2	3.1	2.4	2.6	3.4	3.8	5.2	7.4
1,150.00–1,199.90	3.5	3.2	2.6	2.7	3.7	4.4	7.8	5.6
1,200.00–1,249.90	3.8	3.2	2.7	2.9	4.0	5.6	7.9	4.9

(Continued)

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B9—Number and percentage distribution, by sex, monthly benefit, and age, December 2010—Continued

Monthly benefit (dollars)	Total, 62 or older	62–64	65–69	70–74	75–79	80–84	85–89	90 or older
Men (cont.)								
1,250.00–1,299.90	4.6	3.2	2.8	3.1	5.9	9.3	7.0	4.6
1,300.00–1,349.90	4.8	3.2	2.9	3.5	7.8	8.4	4.9	4.3
1,350.00–1,399.90	4.4	3.2	3.2	4.1	7.6	5.0	3.8	4.0
1,400.00–1,449.90	4.8	4.9	4.5	5.3	5.8	3.6	3.8	4.0
1,450.00–1,499.90	4.8	6.4	5.0	5.8	3.7	3.3	3.9	4.1
1,500.00–1,549.90	4.6	6.4	5.0	5.5	3.0	3.2	3.9	3.9
1,550.00–1,599.90	4.4	5.9	4.9	5.0	3.2	3.6	3.6	3.3
1,600.00–1,649.90	4.1	5.4	4.8	4.3	3.4	3.3	2.9	3.3
1,650.00–1,699.90	3.5	4.8	4.1	3.5	3.0	2.7	2.3	2.2
1,700.00 or more	20.1	9.0	28.4	25.5	15.1	13.1	10.5	14.6
Average benefit (dollars)	1,323.10	1,193.70	1,405.40	1,383.80	1,268.90	1,260.70	1,227.80	1,273.60
Women								
Total								
Number (thousands)	17,011	1,735	4,430	3,665	2,738	2,140	1,441	863
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 400.00	4.8	7.6	5.0	4.6	4.5	4.1	3.5	2.8
400.00–449.90	1.3	1.8	1.2	1.1	1.1	1.2	1.3	1.5
450.00–499.90	1.7	2.0	1.4	1.4	2.0	2.0	1.8	1.4
500.00–549.90	2.6	4.1	2.4	2.3	2.7	2.6	2.4	1.7
550.00–599.90	3.5	5.0	3.1	3.1	3.8	4.0	3.6	2.2
600.00–649.90	4.7	5.4	3.9	4.5	6.0	5.7	3.8	2.6
650.00–699.90	5.3	6.1	5.0	5.9	6.8	5.0	3.5	2.6
700.00–749.90	5.5	7.5	6.1	5.9	5.3	4.3	3.5	2.7
750.00–799.90	5.4	7.8	6.5	5.6	4.8	4.2	3.4	2.8
800.00–849.90	5.1	7.4	6.0	5.2	4.7	3.9	3.3	2.9
850.00–899.90	4.5	5.5	5.2	4.8	4.3	3.7	3.3	3.1
900.00–949.90	4.2	4.2	4.8	4.5	4.1	3.6	3.4	3.5
950.00–999.90	4.0	3.6	4.4	4.2	3.8	3.5	3.6	4.0
1,000.00–1,049.90	3.9	3.3	4.1	3.9	3.6	3.6	4.0	4.7
1,050.00–1,099.90	3.8	3.0	3.8	3.7	3.6	3.8	4.6	5.3
1,100.00–1,149.90	3.8	2.8	3.5	3.5	3.5	4.0	5.2	5.6
1,150.00–1,199.90	3.7	2.6	3.2	3.3	3.5	4.3	6.0	5.8
1,200.00–1,249.90	3.5	2.4	2.9	3.1	3.4	4.5	5.6	5.3
1,250.00–1,299.90	3.5	2.2	2.7	3.0	3.8	4.9	5.0	5.0
1,300.00–1,349.90	3.4	2.0	2.5	3.1	4.0	4.6	4.3	4.6
1,350.00–1,399.90	2.9	1.8	2.4	2.9	3.4	3.5	3.6	3.7
1,400.00–1,449.90	2.8	2.3	2.6	2.9	2.7	2.9	3.3	3.3
1,450.00–1,499.90	2.5	2.5	2.4	2.5	2.2	2.6	3.2	3.0
1,500.00–1,549.90	2.2	2.0	2.1	2.2	1.9	2.4	2.8	2.8
1,550.00–1,599.90	2.0	1.5	1.8	1.9	2.0	2.3	2.4	2.5
1,600.00–1,649.90	1.7	1.2	1.6	1.7	1.8	1.8	2.0	2.6
1,650.00–1,699.90	1.3	0.8	1.3	1.5	1.4	1.3	1.4	1.9
1,700.00 or more	6.5	1.2	8.1	7.7	5.1	5.5	6.3	9.9
Average benefit (dollars)	1,022.90	879.70	1,023.10	1,033.80	1,002.50	1,041.40	1,091.40	1,168.00

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

Primary insurance amount (dollars)	Retired workers		Wives and husbands		Children	
	Number	Percent	Number	Percent	Number	Percent
Total	34,593,080	100.0	2,316,536	100.0	579,859	100.0
Less than 300.00	1,273,376	3.7	63,545	2.7	8,752	1.5
300.00–349.90	532,299	1.5	20,798	0.9	3,902	0.7
350.00–399.90	527,114	1.5	20,799	0.9	4,541	0.8
400.00–449.90	587,564	1.7	21,351	0.9	4,991	0.9
450.00–499.90	521,701	1.5	19,752	0.9	4,970	0.9
500.00–549.90	568,488	1.6	20,776	0.9	5,072	0.9
550.00–599.90	825,888	2.4	28,980	1.3	6,840	1.2
600.00–649.90	900,404	2.6	31,906	1.4	7,754	1.3
650.00–699.90	1,103,930	3.2	37,911	1.6	11,989	2.1
700.00–749.90	1,133,904	3.3	37,801	1.6	14,140	2.4
750.00–799.90	1,128,662	3.3	36,712	1.6	14,072	2.4
800.00–849.90	1,074,520	3.1	35,859	1.5	14,122	2.4
850.00–899.90	1,046,928	3.0	35,677	1.5	14,190	2.4
900.00–949.90	1,019,817	2.9	36,232	1.6	14,555	2.5
950.00–999.90	988,034	2.9	36,874	1.6	14,702	2.5
1,000.00–1,049.90	973,056	2.8	38,987	1.7	14,774	2.5
1,050.00–1,099.90	953,275	2.8	40,324	1.7	15,043	2.6
1,100.00–1,149.90	933,390	2.7	42,163	1.8	15,339	2.6
1,150.00–1,199.90	920,983	2.7	44,544	1.9	15,739	2.7
1,200.00–1,249.90	905,827	2.6	47,275	2.0	15,900	2.7
1,250.00–1,299.90	904,403	2.6	51,218	2.2	16,376	2.8
1,300.00–1,349.90	906,932	2.6	55,823	2.4	16,499	2.8
1,350.00–1,399.90	909,042	2.6	61,508	2.7	16,893	2.9
1,400.00–1,449.90	948,279	2.7	73,040	3.2	17,678	3.0
1,450.00–1,499.90	968,371	2.8	82,446	3.6	17,820	3.1
1,500.00–1,549.90	975,538	2.8	91,432	3.9	18,305	3.2
1,550.00–1,599.90	1,119,327	3.2	118,629	5.1	20,157	3.5
1,600.00–1,649.90	1,160,316	3.4	134,929	5.8	20,858	3.6
1,650.00–1,699.90	1,015,415	2.9	121,882	5.3	19,019	3.3
1,700.00–1,749.90	899,866	2.6	107,139	4.6	17,494	3.0
1,750.00–1,799.90	803,291	2.3	92,209	4.0	16,581	2.9
1,800.00–1,849.90	752,543	2.2	79,673	3.4	16,422	2.8
1,850.00–1,899.90	852,284	2.5	79,641	3.4	20,280	3.5
1,900.00–1,949.90	792,082	2.3	70,646	3.0	19,995	3.4
1,950.00–1,999.90	699,245	2.0	64,464	2.8	18,127	3.1
2,000.00 or more	2,966,986	8.6	333,591	14.4	85,968	14.8
Average primary insurance amount (dollars)	1,224.50		1,456.80		1,412.60	

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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

Table 5.C2—Average monthly benefit, by type of benefit and sex, December 1940–2010, selected years (in dollars)

Year	Retired workers			Wives			Husbands	Children			
	All	Men	Women	All	Entitled 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 1940–2010, selected years
(in dollars)—Continued**

Year	Retired workers			Wives			Husbands	Children			
	All	Men	Women	All	Entitled 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
2004	954.90	1,076.10	826.10	480.90	482.60	394.00	272.90	465.00	437.70	500.50	518.50
2005	1,002.00	1,129.50	867.30	502.50	504.10	419.20	286.20	493.00	465.60	528.40	553.30
2006	1,044.40	1,177.50	904.60	521.40	522.90	440.20	298.30	518.10	489.90	554.40	580.00
2007	1,078.60	1,215.70	935.20	535.60	537.00	456.70	308.50	538.00	509.60	573.50	603.30
2008	1,152.90	1,299.10	1,000.70	573.20	574.70	492.30	334.50	567.50	548.10	586.60	643.40
2009	1,164.30	1,311.70	1,011.40	579.30	580.70	500.90	347.80	570.40	556.80	581.10	648.10
2010	1,175.50	1,323.10	1,022.90	585.40	586.90	509.10	366.00	576.70	563.40	587.20	651.00

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

NOTE: . . . = not applicable.

- a. Aged 62 or older. Includes wives aged 65 or older with children.
- b. Under age 65 with entitled children in their care.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

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	8,203,951	100.0	...	1,067.80	4,309,685	100.0	...	1,191.10	3,894,266	100.0	...	931.30
<i>Summary data</i>												
2005–2010	3,523,007	42.9	...	1,139.80	1,868,990	43.4	...	1,283.40	1,654,017	42.5	...	977.40
2000–2004	2,247,912	27.4	...	1,091.30	1,119,197	26.0	...	1,233.70	1,128,715	29.0	...	950.10
1995–1999	1,111,347	13.5	...	969.70	549,055	12.7	...	1,078.70	562,292	14.4	...	863.10
1990–1994	739,686	9.0	...	920.30	400,969	9.3	...	1,003.90	338,717	8.7	...	821.30
1985–1989	311,486	3.8	...	892.30	189,594	4.4	...	951.50	121,892	3.1	...	800.20
1980–1984	149,358	1.8	...	855.80	99,673	2.3	...	898.80	49,685	1.3	...	769.60
1975–1979	83,385	1.0	...	1,112.50	55,480	1.3	...	1,154.00	27,905	0.7	...	1,030.10
1972–1974	25,710	0.3	...	947.00	17,494	0.4	...	970.10	8,216	0.2	...	898.00
Before 1972	12,060	0.1	...	843.70	9,233	0.2	...	857.30	2,827	0.1	...	799.20
<i>Single-year data</i>												
2010	379,853	4.6	4.6	1,204.10	215,359	5.0	5.0	1,343.90	164,494	4.2	4.2	1,021.20
2009	662,512	8.1	12.7	1,168.60	370,041	8.6	13.6	1,304.50	292,471	7.5	11.7	996.50
2008	690,719	8.4	21.1	1,133.60	368,368	8.5	22.1	1,271.40	322,351	8.3	20.0	976.20
2007	641,515	7.8	28.9	1,121.10	333,091	7.7	29.9	1,263.50	308,424	7.9	27.9	967.40
2006	592,459	7.2	36.2	1,117.40	301,953	7.0	36.9	1,266.50	290,506	7.5	35.4	962.30
2005	555,949	6.8	42.9	1,114.60	280,178	6.5	43.4	1,266.80	275,771	7.1	42.5	959.80
2004	539,589	6.6	49.5	1,120.40	270,551	6.3	49.6	1,273.50	269,038	6.9	49.4	966.50
2003	511,241	6.2	55.8	1,117.60	256,620	6.0	55.6	1,268.60	254,621	6.5	55.9	965.50
2002	466,080	5.7	61.4	1,094.50	232,456	5.4	61.0	1,237.40	233,624	6.0	61.9	952.40
2001	401,634	4.9	66.3	1,057.40	198,831	4.6	65.6	1,186.70	202,803	5.2	67.1	930.60
2000	329,368	4.0	70.3	1,039.50	160,739	3.7	69.3	1,164.10	168,629	4.3	71.5	920.70
1999	281,528	3.4	73.8	1,005.20	137,612	3.2	72.5	1,123.00	143,916	3.7	75.2	892.70
1998	240,373	2.9	76.7	968.70	117,407	2.7	75.3	1,080.20	122,966	3.2	78.3	862.30
1997	213,234	2.6	79.3	952.80	105,049	2.4	77.7	1,059.10	108,185	2.8	81.1	849.50
1996	195,835	2.4	81.7	950.60	98,126	2.3	80.0	1,054.60	97,709	2.5	83.6	846.20
1995	180,377	2.2	83.9	956.00	90,861	2.1	82.1	1,058.60	89,516	2.3	85.9	851.80
1994	168,868	2.1	85.9	950.50	86,347	2.0	84.1	1,047.60	82,521	2.1	88.0	848.90
1993	160,321	2.0	87.9	922.60	84,815	2.0	86.0	1,013.90	75,506	1.9	90.0	820.00
1992	153,310	1.9	89.8	909.60	83,952	1.9	88.0	993.20	69,358	1.8	91.7	808.40
1991	142,167	1.7	91.5	902.50	79,977	1.9	89.9	977.90	62,190	1.6	93.3	805.80
1990	115,020	1.4	92.9	908.60	65,878	1.5	91.4	978.70	49,142	1.3	94.6	814.70
1989	84,870	1.0	93.9	912.20	49,848	1.2	92.5	978.40	35,022	0.9	95.5	817.90
1988	67,874	0.8	94.8	908.60	40,520	0.9	93.5	974.10	27,354	0.7	96.2	811.50
1987	57,907	0.7	95.5	899.20	35,321	0.8	94.3	960.60	22,586	0.6	96.8	803.10
1986	53,299	0.6	96.1	869.20	33,458	0.8	95.1	922.80	19,841	0.5	97.3	778.90
1985	47,536	0.6	96.7	851.30	30,447	0.7	95.8	898.60	17,089	0.4	97.7	767.10
1984	41,888	0.5	97.2	837.00	27,292	0.6	96.4	881.70	14,596	0.4	98.1	753.30
1983	34,043	0.4	97.6	835.10	22,865	0.5	96.9	877.90	11,178	0.3	98.4	747.70
1982	27,613	0.3	98.0	838.30	18,598	0.4	97.4	881.20	9,015	0.2	98.6	749.80
1981	23,341	0.3	98.2	869.90	15,741	0.4	97.7	912.20	7,600	0.2	98.8	782.50
1980	22,473	0.3	98.5	929.10	15,177	0.4	98.1	968.80	7,296	0.2	99.0	846.70
1979	19,784	0.2	98.8	1,092.00	13,198	0.3	98.4	1,137.30	6,586	0.2	99.2	1,001.30
1978	17,429	0.2	99.0	1,189.80	11,385	0.3	98.7	1,236.40	6,044	0.2	99.2	1,101.90
1977	16,457	0.2	99.2	1,140.90	10,974	0.3	98.9	1,181.90	5,483	0.1	99.5	1,058.80
1976	15,689	0.2	99.4	1,086.90	10,487	0.2	99.2	1,129.80	5,202	0.1	99.6	1,000.50
1975	14,026	0.2	99.5	1,040.70	9,436	0.2	99.4	1,072.20	4,590	0.1	99.7	975.90
1974	11,577	1.0	99.7	975.50	7,764	0.2	99.6	1,004.40	3,813	0.1	99.8	916.50
1973	8,970	0.1	99.8	924.20	6,080	1.0	99.7	940.70	2,890	0.1	99.9	889.70
1972	5,163	0.1	99.9	922.90	3,650	0.1	99.8	946.00	1,513	^b	99.9	867.20

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

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

... = not applicable.

a. Represents those entitled in specified year or later.

b. Less than 0.05 percent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D2—Number and percentage distribution, by monthly benefit and sex, December 2010

Monthly benefit (dollars)	Total		Men		Women	
	Number	Percent	Number	Percent	Number	Percent
All disabled workers	8,203,951	100.0	4,309,685	100.0	3,894,266	100.0
Less than 300.00	177,960	2.2	60,617	1.4	117,343	3.0
300.00–349.90	103,660	1.3	35,511	0.8	68,149	1.7
350.00–399.90	119,573	1.5	41,173	1.0	78,400	2.0
400.00–449.90	141,285	1.7	50,530	1.2	90,755	2.3
450.00–499.90	141,452	1.7	49,594	1.2	91,858	2.4
500.00–549.90	157,779	1.9	57,091	1.3	100,688	2.6
550.00–599.90	224,892	2.7	85,206	2.0	139,686	3.6
600.00–649.90	274,008	3.3	106,148	2.5	167,860	4.3
650.00–699.90	410,434	5.0	156,219	3.6	254,215	6.5
700.00–749.90	450,457	5.5	177,700	4.1	272,757	7.0
750.00–799.90	444,052	5.4	183,647	4.3	260,405	6.7
800.00–849.90	426,339	5.2	184,412	4.3	241,927	6.2
850.00–899.90	406,715	5.0	184,315	4.3	222,400	5.7
900.00–949.90	383,901	4.7	181,293	4.2	202,608	5.2
950.00–999.90	359,026	4.4	175,986	4.1	183,040	4.7
1,000.00–1,049.90	338,696	4.1	172,700	4.0	165,996	4.3
1,050.00–1,099.90	314,579	3.8	165,763	3.8	148,816	3.8
1,100.00–1,149.90	292,132	3.6	158,960	3.7	133,172	3.4
1,150.00–1,199.90	270,628	3.3	153,099	3.6	117,529	3.0
1,200.00–1,249.90	250,408	3.1	146,220	3.4	104,188	2.7
1,250.00–1,299.90	230,083	2.8	138,575	3.2	91,508	2.3
1,300.00–1,349.90	211,649	2.6	132,060	3.1	79,589	2.0
1,350.00–1,399.90	192,866	2.4	123,142	2.9	69,724	1.8
1,400.00–1,449.90	178,139	2.2	117,190	2.7	60,949	1.6
1,450.00–1,499.90	164,316	2.0	110,168	2.6	54,148	1.4
1,500.00–1,549.90	150,664	1.8	103,022	2.4	47,642	1.2
1,550.00–1,599.90	148,437	1.8	103,590	2.4	44,847	1.2
1,600.00–1,649.90	140,925	1.7	100,151	2.3	40,774	1.0
1,650.00–1,699.90	124,426	1.5	90,152	2.1	34,274	0.9
1,700.00–1,749.90	114,009	1.4	83,732	1.9	30,277	0.8
1,750.00–1,799.90	105,198	1.3	78,019	1.8	27,179	0.7
1,800.00–1,849.90	103,918	1.3	77,876	1.8	26,042	0.7
1,850.00–1,899.90	125,825	1.5	95,470	2.2	30,355	0.8
1,900.00–1,949.90	113,469	1.4	88,291	2.0	25,178	0.6
1,950.00–1,999.90	92,657	1.1	73,803	1.7	18,854	0.5
2,000.00 or more	319,394	3.9	268,260	6.2	51,134	1.3
Average benefit (dollars)	1,067.80		1,191.10		931.30	

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D3—Number and total monthly benefits, by sex, December 1957–2010, selected years

Year	All disabled workers		Men		Women	
	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)
1957	149,850	10,904	121,172	8,903	28,678	2,001
1958	237,719	19,516	189,883	16,138	47,836	3,378
1959	334,443	29,765	264,201	24,417	70,242	5,348
1960	455,371	40,668	356,277	33,034	99,094	7,633
1965	988,074	96,599	734,047	74,946	254,027	21,656
1970	1,492,948	196,010	1,068,986	148,194	423,962	47,819
1975	2,488,774	562,180	1,710,923	418,013	777,851	144,167
1980	2,858,680	1,059,792	1,928,030	784,266	930,650	275,525
1985	2,656,638	1,285,375	1,784,750	953,156	871,888	332,219
1986	2,728,463	1,331,144	1,826,835	985,003	901,628	346,141
1987	2,785,859	1,415,811	1,857,172	1,044,647	928,687	371,165
1988	2,830,284	1,498,637	1,876,878	1,101,675	953,406	396,962
1989	2,895,364	1,609,780	1,906,379	1,176,403	988,985	433,376
1990	3,011,294	1,768,313	1,967,408	1,283,579	1,043,886	484,735
1991	3,194,938	1,946,823	2,067,777	1,401,006	1,127,161	545,817
1992	3,467,783	2,171,080	2,219,789	1,546,924	1,247,994	624,156
1993	3,725,966	2,390,829	2,357,332	1,685,025	1,368,634	705,804
1994	3,962,954	2,620,982	2,473,061	1,824,195	1,489,893	796,787
1995	4,185,263	2,853,365	2,568,359	1,956,168	1,616,904	897,197
1996	4,385,623	3,087,223	2,644,454	2,083,123	1,741,169	1,004,100
1997	4,508,134	3,252,919	2,666,486	2,158,017	1,841,648	1,094,902
1998	4,698,319	3,444,259	2,737,296	2,252,129	1,961,023	1,192,130
1999	4,879,455	3,679,691	2,801,163	2,371,141	2,078,292	1,308,550
2000	5,042,334	3,965,304	2,856,411	2,521,252	2,185,923	1,444,052
2001	5,274,183	4,295,600	2,951,833	2,697,162	2,322,350	1,598,438
2002	5,543,981	4,625,445	3,070,001	2,872,308	2,473,980	1,753,137
2003	5,873,673	5,060,493	3,224,624	3,114,704	2,649,049	1,945,789
2004	6,198,271	5,542,045	3,373,723	3,381,312	2,824,548	2,160,733
2005	6,518,989	6,114,705	3,517,259	3,697,352	3,001,730	2,417,352
2006	6,806,918	6,655,048	3,643,121	3,998,054	3,163,797	2,656,994
2007	7,098,723	7,127,082	3,773,912	4,249,072	3,324,811	2,878,010
2008	7,426,691	7,895,536	3,924,524	4,672,826	3,502,167	3,222,710
2009	7,788,013	8,288,762	4,100,400	4,877,052	3,687,613	3,411,709
2010	8,203,951	8,759,959	4,309,685	5,133,213	3,894,266	3,626,747

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D4—Number, average age, and percentage distribution, by sex and age, December 1957–2010, selected years

Year	Number (thousands)	Average age	Percentage distribution							
			Total, all ages	Under 30	30–39	40–44	45–49	50–54	55–59	60–FRA
<i>Men</i>										
1957	121	59.4	100.0	...	...	...	...	18.5	29.9	51.6
1958	190	59.5	100.0	...	...	...	...	18.2	29.7	52.1
1959	264	59.3	100.0	...	...	...	...	19.0	30.7	50.3
1960	356	57.3	100.0	0.5	3.3	3.0	4.9	16.6	26.7	44.9
1965	734	54.4	100.0	1.0	7.5	7.6	10.4	15.4	24.7	33.3
1970	1,069	53.9	100.0	3.3	6.8	6.9	10.9	15.2	23.2	33.7
1975	1,711	53.5	100.0	4.6	7.5	6.2	9.7	15.8	23.2	33.0
1980	1,928	52.9	100.0	4.1	9.6	6.0	8.9	14.3	24.0	33.1
1985	1,785	51.9	100.0	4.6	12.3	7.3	8.6	12.9	21.4	32.9
1986	1,827	51.4	100.0	4.9	13.3	7.9	8.9	12.7	20.7	31.5
1987	1,857	51.1	100.0	4.8	13.8	8.5	9.4	12.5	20.1	30.8
1988	1,869	50.9	100.0	4.7	14.3	9.0	9.8	12.7	19.6	29.9
1989	1,906	50.7	100.0	4.5	14.7	9.6	10.3	12.7	19.4	28.8
1990	1,965	50.4	100.0	4.5	15.2	10.3	10.7	12.7	19.1	27.5
1991	2,066	50.1	100.0	4.5	15.6	10.7	11.2	13.0	18.6	26.4
1992	2,221	49.9	100.0	4.6	16.0	11.0	12.0	13.4	18.0	25.0
1993	2,358	49.6	100.0	4.6	16.2	11.2	12.3	13.9	17.9	23.9
1994	2,476	49.6	100.0	4.3	16.1	11.4	12.8	14.2	17.8	23.4
1995	2,573	49.7	100.0	4.0	15.5	11.5	13.4	14.5	18.0	23.2
1996	2,650	49.9	100.0	3.6	14.8	11.6	13.7	15.0	18.3	22.9
1997	2,671	50.2	100.0	3.3	13.9	11.6	13.6	15.7	18.9	23.0
1998	2,741	50.5	100.0	3.1	13.3	11.6	13.7	16.1	19.4	22.9
1999	2,802	50.6	100.0	2.9	12.6	11.6	13.8	16.7	19.7	22.9
2000	2,857	50.7	100.0	2.8	11.8	11.5	13.9	17.3	20.0	22.8
2001	2,952	50.9	100.0	2.9	11.2	11.1	14.0	17.4	20.5	23.0
2002	3,069	51.0	100.0	3.1	10.5	10.7	14.0	17.2	21.1	23.3
2003	3,226	51.3	100.0	3.2	9.9	10.4	13.8	17.1	21.4	24.2
2004	3,373	51.6	100.0	3.2	9.4	9.9	13.8	17.0	21.8	24.9
2005	3,517	51.9	100.0	3.2	8.9	9.4	13.5	17.0	22.4	25.7
2006	3,643	52.2	100.0	3.1	8.5	8.9	13.2	17.0	22.4	27.0
2007	3,774	52.5	100.0	3.1	8.2	8.3	12.8	17.0	21.9	28.6
2008	3,925	52.7	100.0	3.1	8.1	7.9	12.4	17.1	21.7	29.8
2009	4,100	52.8	100.0	3.1	8.1	7.5	12.2	17.2	21.8	30.1
2010	4,310	52.9	100.0	3.1	8.0	7.3	11.8	17.3	22.1	30.4

(Continued)

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D4—Number, average age, and percentage distribution, by sex and age, December 1957–2010, selected years—Continued

Year	Number (thousands)	Average age	Percentage distribution							
			Total, all ages	Under 30	30–39	40–44	45–49	50–54	55–59	60–FRA
<i>Women</i>										
1957	29	57.9	100.0	...	...	...	...	25.6	39.2	35.2
1958	48	58.2	100.0	...	...	...	...	23.8	37.5	38.6
1959	70	58.4	100.0	...	...	...	...	23.4	36.8	39.7
1960	99	56.7	100.0	0.3	3.2	3.2	5.3	19.4	31.4	37.2
1965	254	55.2	100.0	0.6	5.4	6.3	9.8	16.2	27.3	34.3
1970	424	55.0	100.0	1.9	5.1	5.6	10.1	15.9	26.0	35.3
1975	778	54.4	100.0	3.3	6.1	5.3	9.0	16.3	25.5	34.5
1980	931	53.7	100.0	3.4	8.2	5.3	8.2	14.4	25.4	35.0
1985	872	52.6	100.0	3.8	11.2	6.9	8.3	12.9	22.3	34.6
1986	902	52.0	100.0	4.1	12.1	7.6	8.8	12.9	21.6	32.9
1987	929	51.7	100.0	4.2	12.7	8.2	9.4	12.9	20.9	31.7
1988	952	51.4	100.0	4.0	13.1	8.7	9.9	13.2	20.6	30.5
1989	989	51.1	100.0	4.0	13.5	9.2	10.6	13.4	20.1	29.2
1990	1,046	50.8	100.0	3.9	14.0	9.8	11.1	13.4	19.9	27.9
1991	1,133	50.5	100.0	4.0	14.3	10.3	11.6	13.8	19.4	26.5
1992	1,252	50.1	100.0	4.3	14.6	10.7	12.2	14.3	18.8	25.0
1993	1,371	49.9	100.0	4.3	14.9	11.0	12.6	14.8	18.9	23.5
1994	1,491	49.9	100.0	4.1	14.8	11.2	13.1	15.3	18.7	22.8
1995	1,614	49.9	100.0	3.8	14.5	11.5	13.6	15.7	18.8	22.2
1996	1,736	50.0	100.0	3.4	14.1	11.6	13.9	16.2	19.0	21.7
1997	1,835	50.2	100.0	3.1	13.3	11.6	14.0	16.8	19.6	21.5
1998	1,956	50.5	100.0	3.0	12.8	11.5	14.2	17.0	20.0	21.6
1999	2,071	50.5	100.0	2.8	12.1	11.5	14.3	17.5	20.4	21.5
2000	2,179	50.7	100.0	2.7	11.5	11.3	14.5	17.9	20.7	21.5
2001	2,313	50.8	100.0	2.7	11.1	11.1	14.4	18.0	21.1	21.6
2002	2,467	50.9	100.0	2.7	10.6	10.8	14.4	17.8	21.5	22.1
2003	2,642	51.2	100.0	3.0	10.1	10.4	14.2	17.7	21.5	23.1
2004	2,819	51.5	100.0	3.0	9.7	10.0	14.1	17.6	21.8	23.8
2005	2,993	51.7	100.0	2.9	9.2	9.6	13.8	17.7	22.3	24.5
2006	3,164	52.0	100.0	2.8	9.0	9.2	13.5	17.6	22.2	25.7
2007	3,325	52.3	100.0	2.7	8.8	8.7	13.2	17.6	21.8	27.2
2008	3,502	52.5	100.0	2.6	8.6	8.2	12.9	17.6	21.7	28.3
2009	3,688	52.6	100.0	2.6	8.6	7.9	12.7	17.7	22.0	28.4
2010	3,894	52.7	100.0	2.6	8.5	7.7	12.3	17.8	22.3	28.7

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1988 and 1990–2005 are based on a 10 percent sample. All other years are 100 percent data.

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

FRA = full retirement age.

... = not applicable.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

Primary insurance amount (dollars)	Disabled workers		Spouses		Children	
	Number	Percent	Number	Percent	Number	Percent
Total	8,203,951	100.0	160,300	100.0	1,819,906	100.0
Less than 300.00	169,209	2.1	71	a	262	a
300.00–349.90	102,069	1.2	32	a	252	a
350.00–399.90	117,949	1.4	38	a	283	a
400.00–449.90	139,120	1.7	86	0.1	810	a
450.00–499.90	138,956	1.7	69	a	498	a
500.00–549.90	154,790	1.9	87	0.1	1,048	0.1
550.00–599.90	222,508	2.7	425	0.3	7,646	0.4
600.00–649.90	271,000	3.3	1,234	0.8	25,067	1.4
650.00–699.90	408,433	5.0	2,463	1.5	62,011	3.4
700.00–749.90	449,252	5.5	4,330	2.7	132,145	7.3
750.00–799.90	443,372	5.4	5,245	3.3	137,292	7.5
800.00–849.90	426,749	5.2	5,833	3.6	131,643	7.2
850.00–899.90	405,415	4.9	5,869	3.7	123,510	6.8
900.00–949.90	383,910	4.7	6,155	3.8	115,423	6.3
950.00–999.90	359,127	4.4	6,026	3.8	107,228	5.9
1,000.00–1,049.90	339,482	4.1	6,053	3.8	100,456	5.5
1,050.00–1,099.90	314,962	3.8	5,780	3.6	90,776	5.0
1,100.00–1,149.90	293,361	3.6	5,440	3.4	82,648	4.5
1,150.00–1,199.90	272,124	3.3	5,345	3.3	75,229	4.1
1,200.00–1,249.90	251,251	3.1	5,168	3.2	67,447	3.7
1,250.00–1,299.90	231,223	2.8	5,011	3.1	60,368	3.3
1,300.00–1,349.90	213,304	2.6	4,735	3.0	54,257	3.0
1,350.00–1,399.90	194,438	2.4	4,594	2.9	48,237	2.7
1,400.00–1,449.90	179,681	2.2	4,593	2.9	42,796	2.4
1,450.00–1,499.90	165,384	2.0	4,431	2.8	38,414	2.1
1,500.00–1,549.90	152,077	1.9	4,356	2.7	33,461	1.8
1,550.00–1,599.90	149,728	1.8	4,630	2.9	31,788	1.7
1,600.00–1,649.90	142,478	1.7	4,702	2.9	29,122	1.6
1,650.00–1,699.90	125,663	1.5	4,554	2.8	25,257	1.4
1,700.00–1,749.90	114,661	1.4	4,415	2.8	22,967	1.3
1,750.00–1,799.90	106,133	1.3	4,440	2.8	21,106	1.2
1,800.00–1,849.90	104,254	1.3	4,615	2.9	20,915	1.1
1,850.00–1,899.90	127,128	1.5	5,986	3.7	24,889	1.4
1,900.00–1,949.90	115,565	1.4	5,801	3.6	22,099	1.2
1,950.00–1,999.90	94,243	1.1	5,197	3.2	17,632	1.0
2,000.00 or more	324,952	4.0	22,491	14.0	64,924	3.6
Average primary insurance amount (dollars)	1,072.40		1,427.90		1,132.60	

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

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

a. Less than 0.05 percent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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

Table 5.E2—Average monthly benefit, by type of benefit, sex, and age, December 1957–2010, selected years (in dollars)

Year	Disabled workers			Spouses		Children			
	All	Men	Women	Wives	Husbands	All	Under age 18	Disabled adult children	Students
1957	72.80	73.50	69.80	...	...	...	...	...	...
1958	82.10	85.00	70.60	34.00	33.90	27.30	27.30	38.50	...
1959	89.00	92.40	76.10	36.10	34.70	31.00	30.80	39.40	...
1960	89.30	92.70	77.00	34.40	34.70	30.20	30.00	39.00	...
1965	97.80	102.10	85.30	35.00	32.60	31.60	30.90	41.60	49.30
1970	131.30	138.60	112.80	42.60	42.40	38.60	36.90	53.30	54.10
1975	225.90	244.30	185.30	67.40	61.70	62.00	58.60	84.10	86.90
1980	370.70	406.80	296.10	110.60	91.80	110.30	104.60	136.00	152.40
1985	483.80	534.10	381.00	132.70	102.70	141.80	138.90	183.80	196.90
1990	587.20	652.40	464.40	151.30	96.90	163.80	158.80	231.40	250.00
1991	609.40	677.50	484.20	154.60	101.70	167.90	162.70	240.90	253.20
1992	626.10	696.90	500.10	156.40	106.00	170.20	165.10	246.80	262.00
1993	641.70	714.80	515.70	157.50	108.60	173.10	167.70	253.30	265.90
1994	661.40	731.60	534.80	161.00	112.60	177.70	172.20	261.50	273.80
1995	681.80	761.60	554.90	165.00	116.60	183.50	177.90	270.10	284.10
1996	703.90	787.70	576.70	172.60	124.50	193.50	187.70	281.70	295.00
1997	721.60	809.30	594.50	178.00	129.10	201.20	195.20	292.20	306.30
1998	733.10	822.80	607.90	183.00	136.50	207.50	201.40	300.20	313.10
1999	754.10	846.50	629.60	190.20	145.40	216.10	209.50	310.70	319.80
2000	786.40	882.70	660.60	199.50	155.90	227.60	220.80	325.60	336.00
2001	814.50	913.70	688.30	208.20	164.50	237.90	230.70	339.90	343.50
2002	834.30	935.60	708.60	213.70	168.50	245.00	237.40	349.10	350.10
2003	861.60	965.90	734.50	222.70	176.90	253.90	245.90	360.90	359.10
2004	894.10	1,002.20	765.00	232.90	186.10	264.90	256.90	376.10	367.80
2005	938.00	1,051.20	805.30	247.70	197.70	278.90	270.20	394.60	387.10
2006	977.70	1,097.40	839.80	259.40	208.40	290.40	281.30	410.10	400.50
2007	1,004.00	1,125.90	865.60	268.80	215.00	299.00	289.10	419.90	410.60
2008	1,063.10	1,190.70	920.20	287.60	229.40	317.60	306.60	441.50	436.00
2009	1,064.30	1,189.40	925.20	288.60	234.60	317.90	306.80	441.80	428.70
2010	1,067.80	1,191.10	931.30	288.40	241.70	318.40	306.80	443.00	432.20

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

NOTE: ... = not applicable.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 1950–2010, 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
2004	2,568,853	1,227,331	2,480,652	1,197,209	49,947	19,681	40,122	15,378	9,825	4,303	38,254	10,441
2005	2,526,459	1,260,857	2,439,582	1,229,775	46,766	19,602	37,543	15,315	9,223	4,287	40,111	11,479
2006	2,478,599	1,282,860	2,391,928	1,250,678	44,597	19,632	35,847	15,344	8,750	4,287	42,074	12,550
2007	2,432,082	1,292,620	2,345,674	1,259,718	42,159	19,252	34,025	15,131	8,134	4,122	44,249	13,649
2008	2,370,611	1,347,716	2,282,698	1,311,855	40,884	20,129	33,079	15,847	7,805	4,282	47,029	15,732
2009	2,343,601	1,345,643	2,250,741	1,307,001	41,443	20,758	33,632	16,379	7,811	4,378	51,417	17,885
2010	2,316,536	1,343,640	2,216,430	1,300,831	43,102	21,943	34,020	16,775	9,082	5,168	57,004	20,866

(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 1950–2010, 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
2004	152,804	35,378	57,891	17,437	90,407	17,103	84,885	15,608	5,522	1,494	4,506	838
2005	153,800	37,865	63,069	19,930	86,029	17,006	80,644	15,482	5,385	1,523	4,702	930
2006	153,470	39,563	67,445	21,934	81,122	16,607	75,917	15,069	5,205	1,538	4,903	1,022
2007	152,802	40,791	71,212	23,591	76,415	16,087	71,372	14,554	5,043	1,533	5,175	1,113
2008	154,230	44,030	76,035	26,501	72,668	16,261	67,851	14,696	4,817	1,565	5,527	1,268
2009	158,122	45,306	79,969	27,759	72,083	16,124	67,252	14,558	4,831	1,566	6,070	1,424
2010	160,300	45,925	81,487	28,093	72,201	16,234	67,346	14,638	4,855	1,596	6,612	1,598

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

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

... = 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 age 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: (410) 965-0090 or statistics@ssa.gov.

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 2010

Monthly benefit (dollars)	Total, 62 or older	62–64	65–69	70–74	75–79	80–84	85 or older
Total							
Number	2,297,917	249,766	614,454	542,650	439,928	295,617	155,502
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 150.00	5.3	12.4	6.0	4.5	3.6	2.9	2.4
150.00–174.90	1.4	2.5	1.6	1.3	1.1	0.9	1.0
175.00–199.90	1.4	2.4	1.5	1.3	1.0	0.9	0.9
200.00–224.90	1.5	2.5	1.7	1.4	1.3	1.2	1.1
225.00–249.90	1.8	3.0	2.0	1.7	1.6	1.4	1.2
250.00–274.90	2.0	3.3	2.1	1.8	1.6	1.5	1.4
275.00–299.90	2.1	3.1	2.2	2.0	1.8	1.8	1.7
300.00–324.90	2.1	2.9	2.2	2.0	1.9	1.7	1.7
325.00–349.90	2.1	2.8	2.2	2.2	1.9	1.8	1.8
350.00–374.90	2.1	2.8	2.2	2.1	2.0	1.9	1.9
375.00–399.90	2.2	2.6	2.2	2.2	2.1	2.0	2.1
400.00–424.90	2.3	2.6	2.2	2.2	2.3	2.2	2.3
425.00–449.90	2.4	2.5	2.2	2.4	2.5	2.5	2.5
450.00–474.90	2.5	2.6	2.3	2.5	2.7	2.8	2.9
475.00–499.90	2.7	2.5	2.3	2.7	3.0	3.1	3.6
500.00–524.90	3.0	2.5	2.4	2.9	3.3	3.7	4.8
525.00–549.90	3.6	2.6	2.5	3.1	3.8	5.0	7.8
550.00–574.90	4.1	2.7	2.8	3.3	4.3	6.6	8.3
575.00–599.90	4.9	2.7	3.0	4.3	6.4	8.9	6.5
600.00–624.90	5.8	2.7	3.2	5.8	9.1	9.5	5.4
625.00–649.90	5.4	2.9	3.5	6.3	8.5	6.3	3.9
650.00–674.90	4.9	4.2	4.3	6.0	6.0	3.6	3.6
675.00–699.90	4.2	4.5	4.5	5.1	3.6	3.0	3.4
700.00–724.90	3.7	4.5	4.5	4.1	2.6	2.7	3.4
725.00–749.90	3.5	4.5	4.4	3.4	2.3	2.6	3.3
750.00–774.90	3.2	4.3	4.2	2.9	2.1	2.5	3.4
775.00–799.90	2.9	3.9	3.4	2.5	2.2	2.7	3.4
800.00–824.90	2.5	3.0	2.5	2.3	2.2	2.5	3.3
825.00–849.90	2.1	1.8	2.1	2.0	2.0	2.2	2.4
850.00 or more	12.3	2.6	17.9	13.5	11.3	9.7	8.7
Average benefit (dollars)	578.30	476.50	601.80	590.40	582.20	582.20	588.50

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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

Table 5.F4—Number of children and total monthly benefits, by type of benefit, December 1940–2010, 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
2004	3,986,319	482,894	1,904,631	1,598,794	1,838,926	224,538	1,190,871	423,518
2005	4,024,815	488,425	1,903,477	1,632,913	1,945,508	240,777	1,249,328	455,402
2006	4,040,530	489,940	1,898,862	1,651,728	2,031,723	253,820	1,298,187	479,716
2007	4,050,691	494,296	1,891,706	1,664,689	2,095,892	265,936	1,332,248	497,708
2008	4,131,594	525,197	1,914,524	1,691,873	2,262,489	298,072	1,427,099	537,318
2009	4,230,578	561,451	1,921,148	1,747,979	2,311,770	320,237	1,435,847	555,686
2010	4,312,554	579,859	1,912,789	1,819,906	2,351,759	334,405	1,437,963	579,391
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
2004	3,104,055	277,195	1,338,920	1,487,940	1,325,370	121,320	821,844	382,206
2005	3,129,506	281,634	1,331,531	1,516,341	1,399,043	131,142	858,135	409,766
2006	3,133,398	282,281	1,320,862	1,530,255	1,455,066	138,296	886,393	430,377
2007	3,119,523	281,848	1,302,665	1,535,010	1,487,902	143,616	900,537	443,748
2008	3,118,230	285,944	1,280,182	1,552,104	1,576,703	156,733	944,058	475,912
2009	3,158,138	301,132	1,258,817	1,598,189	1,592,358	167,672	934,400	490,286
2010	3,208,791	309,512	1,239,083	1,660,196	1,609,289	174,383	925,590	509,316
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
2004	759,264	191,285	503,242	64,737	446,134	95,744	326,042	24,349
2005	768,535	191,979	507,961	68,595	473,620	101,440	345,113	27,067
2006	776,596	192,122	512,596	71,878	498,891	106,512	362,902	29,477
2007	794,677	196,038	521,293	77,346	524,763	112,420	379,869	32,474
2008	871,466	221,943	564,735	84,788	594,115	130,201	426,482	37,432
2009	920,883	241,042	589,575	90,266	622,827	140,072	442,872	39,882
2010	949,200	250,262	601,420	97,518	644,297	146,946	454,155	43,196

(Continued)

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

Table 5.F4—Number of children and total monthly benefits, by type of benefit, December 1940–2010, selected years—Continued

Year	Number of children of—				Total monthly benefits for children of— (thousands of dollars)			
	All workers	Retired workers	Deceased workers	Disabled workers	All workers	Retired workers	Deceased workers	Disabled workers
<i>Students</i>								
1965	205,677	34,152	155,088	16,437	13,725	1,597	11,318	811
1970	537,170	89,994	371,982	75,194	44,672	5,351	35,252	4,069
1980	733,267	143,366	449,744	140,157	167,107	26,375	119,368	21,363
1990	89,278	12,208	52,938	24,132	34,641	3,673	24,935	6,033
1995	91,514	10,879	51,155	29,480	40,253	3,919	27,958	8,376
2000	97,768	11,459	51,565	34,744	49,184	5,092	32,417	11,674
2001	108,983	12,746	57,353	38,884	56,164	5,897	36,912	13,356
2002	122,698	14,368	64,381	43,949	64,048	6,854	41,808	15,386
2003	127,787	14,683	66,295	46,809	68,351	7,321	44,218	16,811
2004	123,000	14,414	62,469	46,117	67,422	7,474	42,985	16,963
2005	126,774	14,812	63,985	47,977	72,845	8,196	46,080	18,570
2006	130,536	15,537	65,404	49,595	77,766	9,012	48,892	19,862
2007	136,491	16,410	67,748	52,333	83,228	9,900	51,842	21,486
2008	141,898	17,310	69,607	54,981	91,670	11,138	56,559	23,973
2009	151,557	19,277	72,756	59,524	96,585	12,493	58,575	25,517
2010	154,563	20,085	72,286	62,192	98,173	13,076	58,217	26,879

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

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

. . . = not applicable.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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

Table 5.F6—Average monthly benefit for survivors, by type of benefit, December 1940–2010, 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 1940–2010, selected years (in dollars)—Continued

Year	Widowed mothers and fathers	Nondisabled		Parents	Children				Disabled	
		Widows	Widowers		Total	Under age 18	Disabled adult children	Students	Widows	Widowers
1995	477.90	681.20	500.20	590.80	468.70	459.80	487.40	546.50	461.50	307.60
1996	514.90	708.30	520.70	613.50	487.20	478.20	506.10	560.80	474.30	318.00
1997	532.00	732.50	534.50	635.70	500.00	490.10	521.30	569.60	483.90	326.90
1998	545.10	750.30	549.10	651.10	509.60	498.90	532.80	579.90	491.00	332.90
1999	565.70	776.10	572.40	673.90	526.30	515.00	550.40	595.80	503.90	340.30
2000	595.00	811.80	606.90	703.90	550.10	538.30	574.70	628.70	523.80	361.70
2001	620.80	842.50	636.80	728.60	570.80	558.90	595.20	643.60	541.20	374.80
2002	640.20	862.80	662.80	752.70	584.60	572.90	608.40	649.40	553.00	384.70
2003	663.70	889.50	697.70	779.20	603.10	591.40	626.10	667.00	569.10	400.80
2004	689.40	921.90	736.00	809.70	625.30	613.80	647.90	688.10	588.50	416.60
2005	724.50	968.40	785.30	850.60	656.30	644.50	679.40	720.20	615.50	441.50
2006	756.60	1,009.80	829.10	892.20	683.70	671.10	708.00	747.50	637.40	455.00
2007	781.80	1,042.60	864.50	918.00	704.30	691.30	728.70	765.20	652.70	468.80
2008	834.90	1,114.70	937.90	978.90	745.40	737.40	755.20	812.50	691.80	498.00
2009	841.60	1,125.90	961.50	987.80	747.40	742.30	751.20	805.10	691.50	497.30
2010	848.90	1,136.40	977.90	998.20	751.80	747.00	755.10	805.40	690.90	498.70

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

NOTE: . . . = not applicable.

a. Estimated.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

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	158,061	100.0	4,040,960	100.0	1,573	100.0	244,953	100.0	1,912,789	100.0
Less than 300.00	1,860	1.2	32,207	0.8	5	0.3	1,766	0.7	50,826	2.7
300.00–349.90	859	0.5	13,027	0.3	4	0.3	997	0.4	22,701	1.2
350.00–399.90	999	0.6	14,116	0.3	5	0.3	1,139	0.5	24,217	1.3
400.00–449.90	1,112	0.7	47,072	1.2	10	0.6	1,604	0.7	46,112	2.4
450.00–499.90	1,150	0.7	23,872	0.6	3	0.2	1,517	0.6	30,504	1.6
500.00–549.90	1,320	0.8	31,272	0.8	7	0.4	1,686	0.7	32,384	1.7
550.00–599.90	1,714	1.1	49,411	1.2	17	1.1	2,377	1.0	43,531	2.3
600.00–649.90	2,065	1.3	57,394	1.4	37	2.4	3,027	1.2	51,581	2.7
650.00–699.90	3,632	2.3	60,577	1.5	49	3.1	4,774	1.9	74,078	3.9
700.00–749.90	4,611	2.9	67,301	1.7	59	3.8	5,795	2.4	85,208	4.5
750.00–799.90	4,858	3.1	68,380	1.7	62	3.9	6,031	2.5	83,569	4.4
800.00–849.90	5,075	3.2	73,663	1.8	73	4.6	6,618	2.7	82,172	4.3
850.00–899.90	5,177	3.3	78,996	2.0	71	4.5	7,010	2.9	81,478	4.3
900.00–949.90	5,550	3.5	87,511	2.2	71	4.5	7,611	3.1	81,562	4.3
950.00–999.90	5,609	3.5	88,692	2.2	73	4.6	7,739	3.2	75,989	4.0
1,000.00–1,049.90	5,925	3.7	109,925	2.7	67	4.3	8,402	3.4	79,666	4.2
1,050.00–1,099.90	6,130	3.9	130,651	3.2	69	4.4	8,674	3.5	78,751	4.1
1,100.00–1,149.90	6,078	3.8	130,387	3.2	63	4.0	9,085	3.7	71,799	3.8
1,150.00–1,199.90	6,038	3.8	143,374	3.5	79	5.0	9,164	3.7	68,569	3.6
1,200.00–1,249.90	5,960	3.8	155,787	3.9	48	3.1	9,310	3.8	64,927	3.4
1,250.00–1,299.90	5,588	3.5	163,991	4.1	56	3.6	9,329	3.8	61,336	3.2
1,300.00–1,349.90	5,518	3.5	170,872	4.2	65	4.1	9,304	3.8	57,556	3.0
1,350.00–1,399.90	5,143	3.3	185,282	4.6	41	2.6	9,221	3.8	54,122	2.8
1,400.00–1,449.90	5,050	3.2	215,996	5.3	51	3.2	9,054	3.7	52,676	2.8
1,450.00–1,499.90	4,684	3.0	230,905	5.7	44	2.8	8,893	3.6	49,139	2.6
1,500.00–1,549.90	4,254	2.7	234,853	5.8	43	2.7	8,649	3.5	44,910	2.3
1,550.00–1,599.90	4,249	2.7	247,047	6.1	41	2.6	8,752	3.6	43,642	2.3
1,600.00–1,649.90	3,945	2.5	239,115	5.9	30	1.9	8,388	3.4	40,049	2.1
1,650.00–1,699.90	3,641	2.3	162,431	4.0	31	2.0	7,741	3.2	31,821	1.7
1,700.00–1,749.90	3,436	2.2	127,418	3.2	41	2.6	6,989	2.9	27,790	1.5
1,750.00–1,799.90	3,262	2.1	97,530	2.4	29	1.8	6,560	2.7	24,366	1.3
1,800.00–1,849.90	3,298	2.1	80,729	2.0	29	1.8	6,598	2.7	22,972	1.2
1,850.00–1,899.90	4,240	2.7	78,192	1.9	33	2.1	8,132	3.3	27,460	1.4
1,900.00–1,949.90	4,061	2.6	68,268	1.7	29	1.8	7,109	2.9	25,363	1.3
1,950.00–1,999.90	3,506	2.2	58,395	1.4	27	1.7	6,218	2.5	21,568	1.1
2,000.00 or more	18,464	11.7	216,321	5.4	111	7.1	19,690	8.0	98,395	5.1

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 1950–2010

Year	Total		Nondisabled—				Disabled widow(er)s	
			Widows		Widowers			
	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)
1950	314,189	11,481	314,126	11,479	63	2	...	...
1951	384,265	13,849	384,011	13,841	254	8	...	...
1952	454,563	18,482	454,064	18,466	499	17	...	...
1953	540,653	22,096	539,854	22,069	799	27	...	...
1954	638,091	29,526	637,012	29,483	1,079	42	...	...
1955	701,360	34,152	700,294	34,103	1,066	50	...	...
1956	913,069	45,780	911,841	45,722	1,228	58	...	...
1957	1,095,137	55,944	1,093,645	55,872	1,492	71	...	...
1958	1,232,583	63,977	1,230,953	63,897	1,630	80	...	...
1959	1,393,587	79,047	1,391,686	78,946	1,901	101	...	...
1960	1,543,843	89,054	1,541,790	88,943	2,053	110	...	...
1961	1,697,308	110,179	1,694,977	110,035	2,331	144	...	...
1962	1,859,191	122,475	1,856,658	122,318	2,533	157	...	...
1963	2,010,769	134,403	2,008,102	134,234	2,667	168	...	...
1964	2,158,912	146,476	2,156,143	146,300	2,769	176	...	...
1965	2,371,433	174,883	2,368,629	174,688	2,804	195	...	...
1966	2,602,015	192,821	2,599,178	192,620	2,837	200	...	...
1967	2,769,618	207,692	2,766,736	207,487	2,882	205	...	...
1968	2,937,890	253,924	2,913,376	252,123	2,951	242	21,563	1,558
1969	3,091,710	269,799	3,049,177	266,741	3,064	255	39,469	2,803
1970	3,227,160	328,245	3,174,846	323,912	3,033	293	49,281	4,041
1971	3,366,304	380,963	3,306,528	375,528	3,033	322	56,743	5,113
1972	3,509,777	483,161	3,442,595	475,746	3,015	386	64,167	7,029
1973	3,656,353	571,654	3,574,458	562,441	3,126	459	78,769	8,754
1974	3,769,559	663,569	3,674,376	651,471	3,055	502	92,128	11,596
1975	3,888,705	747,902	3,776,090	732,269	3,104	553	109,511	15,080
1976	3,994,380	827,325	3,871,894	809,181	3,059	587	119,427	17,557
1977	4,119,487	914,738	3,980,324	892,764	11,887	2,105	127,276	19,869
1978	4,211,710	1,005,929	4,066,673	981,615	15,287	2,845	129,751	21,469
1979	4,321,496	1,153,272	4,173,745	1,126,089	17,918	3,745	129,833	23,438
1980	4,410,515	1,358,836	4,262,607	1,327,814	20,328	4,866	127,580	26,156
1981	4,507,941	1,560,103	4,363,708	1,526,511	22,643	6,042	121,590	27,550
1982	4,594,961	1,724,392	4,453,575	1,689,073	25,014	7,144	116,372	28,175
1983	4,693,791	1,844,798	4,554,414	1,808,647	27,786	8,216	111,591	27,935
1984	4,779,190	1,973,203	4,640,805	1,930,807	29,234	8,970	109,151	33,426
1985	4,862,805	2,094,003	4,725,618	2,050,678	30,182	9,592	107,005	33,734
1986	4,928,019	2,175,345	4,789,969	2,131,049	31,076	10,092	106,974	34,204
1987	4,983,846	2,318,747	4,846,135	2,272,557	31,429	10,703	106,282	35,487
1988	5,028,822	2,461,945	4,892,829	2,414,239	32,870	11,816	103,123	35,892
1989	5,070,873	2,629,728	4,935,911	2,579,726	33,332	12,731	101,630	37,270
1990	5,111,482	2,827,012	4,976,420	2,773,818	34,073	13,916	100,989	39,278
1991	5,158,383	2,989,385	5,008,789	2,927,768	35,105	15,024	114,489	46,593
1992	5,205,375	3,138,250	5,037,583	3,066,568	36,468	16,178	131,324	55,504
1993	5,224,279	3,264,849	5,039,874	3,183,768	37,390	17,255	147,015	63,826
1994	5,232,379	3,394,982	5,034,219	3,305,229	37,484	18,043	160,676	71,710
1995	5,225,519	3,514,262	5,014,991	3,416,203	37,504	18,759	173,024	79,300
1996	5,209,812	3,639,632	4,990,079	3,534,268	37,822	19,692	181,911	85,671
1997	5,053,442	3,646,898	4,829,456	3,537,348	36,048	19,268	187,938	90,282
1998	4,989,855	3,685,349	4,759,829	3,571,047	35,845	19,683	194,181	94,619
1999	4,943,915	3,774,601	4,709,091	3,654,598	36,029	20,624	198,795	99,380

(Continued)

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

Table 5.F8—Number of widow(er)s and total monthly benefits, by type of benefit, December 1950–2010—Continued

Year	Total		Nondisabled—				Disabled widow(er)s	
	Number	Total monthly benefits (thousands of dollars)	Widows		Widowers		Number	Total monthly benefits (thousands of dollars)
			Number	Total monthly benefits (thousands of dollars)	Number	Total monthly benefits (thousands of dollars)		
2000	4,901,437	3,912,527	4,663,228	3,785,532	36,782	22,322	201,427	104,674
2001	4,828,327	3,997,687	4,586,677	3,864,251	37,407	23,822	204,243	109,615
2002	4,770,638	4,043,051	4,524,020	3,903,384	39,260	26,020	207,358	113,648
2003	4,707,215	4,110,963	4,456,446	3,964,035	41,410	28,892	209,359	118,035
2004	4,643,035	4,200,895	4,388,305	4,045,712	43,995	32,379	210,735	122,803
2005	4,568,991	4,339,977	4,310,330	4,174,318	45,660	35,856	213,001	129,804
2006	4,493,620	4,445,576	4,225,561	4,267,017	47,881	39,700	220,178	138,859
2007	4,436,338	4,526,864	4,160,409	4,337,586	50,947	44,045	224,982	145,233
2008	4,380,164	4,773,510	4,094,903	4,564,447	55,254	51,821	230,007	157,243
2009	4,326,976	4,757,157	4,030,494	4,538,025	60,002	57,695	236,480	161,437
2010	4,285,913	4,748,771	3,975,424	4,517,797	65,536	64,086	244,953	166,888

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

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

. . . = not applicable.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

Year	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)
Total	4,040,960	100.0	...	1,133.90
2005–2010	1,428,273	35.3	...	1,200.30
2000–2004	838,426	20.8	...	1,179.90
1995–1999	638,480	15.8	...	1,128.30
1990–1994	511,152	12.7	...	1,080.10
1985–1989	361,608	9.0	...	1,011.90
1980–1984	191,831	4.8	...	938.30
1975–1979	56,655	1.4	...	855.10
1972–1974	10,508	0.3	...	792.00
Before 1972	4,027	0.1	...	783.80
2010	259,862	6.4	6.4	1,198.10
2009	273,099	6.8	13.2	1,199.60
2008	252,827	6.3	19.4	1,207.30
2007	233,072	5.8	25.2	1,203.50
2006	212,211	5.3	30.5	1,198.00
2005	197,202	4.9	35.3	1,193.80
2004	185,227	4.6	39.9	1,199.30
2003	180,349	4.5	44.4	1,192.00
2002	167,736	4.2	48.5	1,178.00
2001	157,563	3.9	52.4	1,164.60
2000	147,551	3.7	56.1	1,159.30
1999	139,922	3.5	59.6	1,146.80
1998	133,216	3.3	62.9	1,134.80
1997	126,237	3.1	66.0	1,124.60
1996	121,894	3.0	69.0	1,118.50
1995	117,211	2.9	71.9	1,113.20
1994	112,814	2.8	74.7	1,103.10
1993	107,221	2.7	77.3	1,093.90
1992	103,144	2.6	79.9	1,080.80
1991	96,418	2.4	82.3	1,065.20
1990	91,555	2.3	84.5	1,050.40
1989	83,832	2.1	86.6	1,038.60
1988	79,064	2.0	88.6	1,022.20
1987	72,669	1.8	90.4	1,010.30
1986	66,710	1.7	92.0	994.50
1985	59,333	1.5	93.5	981.70
1984	51,918	1.3	94.8	962.60
1983	45,868	1.1	95.9	946.20
1982	37,512	0.9	96.8	936.70
1981	31,973	0.8	97.6	918.90
1980	24,560	0.6	98.2	899.90
1979	18,391	0.5	98.7	883.20
1978	13,714	0.3	99.0	868.20
1977	9,769	0.2	99.3	844.30
1976	8,479	0.2	99.5	823.40
1975	6,302	0.2	99.6	803.90
1974	4,743	0.1	99.8	797.00
1973	3,367	0.1	99.8	793.40
1972	2,398	0.1	99.9	780.10

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

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

... = not applicable.

a. Represents those entitled in specified year or later.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 5.F10—Number, percentage, and average monthly benefit, by year of entitlement as disabled widow(er), December 2010

Year	Number	Percentage distribution	Cumulative percentage ^a	Average monthly benefit (dollars)
Total	244,953	100.0	...	681.30
2005–2010	139,303	56.9	...	672.00
2000–2004	79,599	32.5	...	701.70
1995–1999	26,051	10.6	...	669.00
2010	17,195	7.0	7.0	648.10
2009	25,156	10.3	17.3	660.40
2008	25,797	10.5	27.8	677.40
2007	24,445	10.0	37.8	672.80
2006	23,755	9.7	47.5	680.50
2005	22,955	9.4	56.9	686.80
2004	21,619	8.8	65.7	700.20
2003	18,753	7.7	73.4	702.70
2002	15,861	6.5	79.8	713.00
2001	12,978	5.3	85.1	697.30
2000	10,388	4.2	89.4	690.90
1999	8,295	3.4	92.8	679.10
1998	6,578	2.7	95.4	669.10
1997	5,200	2.1	97.6	653.90
1996	3,683	1.5	99.1	664.80
1995	2,295	0.9	100.0	673.00

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

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

... = not applicable.

a. Represents those entitled in specified year or later.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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

Table 5.F11—Percentage distribution of nondisabled widow(er)s, by monthly benefit and age, December 2010

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	4,040,960	124,848	331,102	622,658	521,258	627,631	734,212	638,851	440,400
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 300.00	1.9	2.7	3.1	1.9	2.1	2.1	2.0	1.6	0.6
300.00–349.90	0.9	0.9	0.9	0.6	0.8	0.8	0.9	1.1	1.2
350.00–399.90	1.0	1.0	0.9	0.7	0.8	0.9	0.9	1.0	1.5
400.00–449.90	1.3	1.3	1.1	1.0	1.3	1.3	1.3	1.5	1.8
450.00–499.90	1.5	1.7	1.3	1.2	1.6	1.6	1.6	1.6	1.5
500.00–549.90	1.8	2.6	1.8	1.5	1.9	1.8	1.8	1.8	1.8
550.00–599.90	2.0	2.8	2.1	1.7	2.1	2.1	2.0	2.0	2.1
600.00–649.90	2.2	2.9	2.3	1.9	2.3	2.3	2.2	2.2	2.3
650.00–699.90	2.4	3.1	2.5	2.0	2.4	2.4	2.3	2.4	2.6
700.00–749.90	2.6	3.1	2.7	2.2	2.6	2.6	2.6	2.7	3.0
750.00–799.90	3.0	3.5	2.8	2.4	2.8	3.0	3.0	3.3	3.7
800.00–849.90	3.2	3.6	3.1	2.6	2.9	3.2	3.2	3.4	3.9
850.00–899.90	3.6	3.7	3.3	2.9	3.3	3.6	3.7	4.1	4.5
900.00–949.90	3.8	3.9	3.5	3.1	3.6	3.9	3.9	4.2	4.6
950.00–999.90	4.1	4.1	3.8	3.4	3.9	4.2	4.3	4.6	4.6
1,000.00–1,049.90	4.6	4.3	4.0	3.7	4.3	4.8	5.1	5.3	5.0
1,050.00–1,099.90	5.0	4.3	4.2	3.9	4.6	5.2	5.9	5.8	5.2
1,100.00–1,149.90	5.6	4.6	4.4	4.4	5.6	6.6	6.4	5.7	5.3
1,150.00–1,199.90	5.8	4.5	4.5	4.7	6.3	6.5	5.9	6.7	5.4
1,200.00–1,249.90	5.3	4.1	4.4	4.7	5.9	5.5	5.6	6.0	4.8
1,250.00–1,299.90	5.0	3.9	4.3	4.6	5.5	5.2	5.8	4.9	4.4
1,300.00–1,349.90	4.9	4.4	4.7	4.9	5.1	5.5	5.6	4.2	4.0
1,350.00–1,399.90	4.3	5.4	5.2	5.0	4.6	4.7	4.1	3.3	3.0
1,400.00–1,449.90	3.7	5.2	5.0	4.8	3.9	3.6	3.1	3.1	2.7
1,450.00–1,499.90	3.4	4.6	4.8	4.5	3.3	2.8	2.9	3.1	2.4
1,500.00–1,549.90	3.1	4.0	4.6	4.2	2.7	2.5	2.7	2.7	2.3
1,550.00–1,599.90	2.8	3.5	4.1	3.8	2.5	2.5	2.5	2.2	2.1
1,600.00–1,649.90	2.3	2.6	3.4	3.0	2.3	2.1	1.9	1.9	2.3
1,650.00–1,699.90	1.7	2.0	2.4	2.5	1.9	1.5	1.3	1.2	1.7
1,700.00–1,749.90	1.4	1.0	1.6	2.1	1.5	1.1	1.0	1.0	1.5
1,750.00–1,799.90	1.1	0.3	1.2	1.9	1.2	0.8	0.8	0.8	1.2
1,800.00–1,849.90	0.9	0.1	0.8	1.6	1.0	0.6	0.6	0.7	1.0
1,850.00–1,899.90	0.7	0.1	0.5	1.4	0.8	0.4	0.4	0.5	0.8
1,900.00 or more	3.1	0.1	0.8	5.0	2.6	2.2	2.6	3.4	5.3
Average benefit (dollars)	1,133.90	1,072.40	1,132.00	1,219.40	1,132.40	1,109.10	1,111.40	1,111.50	1,138.60

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 1950–2010, 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
1965	471,816	30,882	471,286	30,842	461,011	30,132	10,275	710	530	40
1970	523,136	45,258	521,698	45,127	510,215	44,039	11,483	1,089	1,438	131
1971	535,126	51,163	533,560	51,055	520,301	49,603	13,259	1,402	1,566	158
1972	540,965	62,457	539,153	62,237	526,548	60,612	12,605	1,625	1,812	220
1973	571,907	67,578	565,327	66,823	551,509	64,985	13,818	1,838	6,580	754
1974	573,506	76,980	562,801	75,605	544,335	72,914	18,466	2,692	10,705	1,374
1975	581,845	85,676	565,941	83,435	544,886	80,068	21,075	3,366	15,904	2,241
1976	578,727	92,466	558,933	89,400	537,002	85,637	21,931	3,764	19,794	3,065
1977	583,195	101,345	558,886	97,227	536,481	93,091	22,405	4,136	24,309	4,117
1978	576,343	109,714	548,463	104,506	525,879	100,028	22,584	4,478	27,880	5,209
1979	573,750	121,957	541,480	115,284	518,564	110,235	22,916	5,049	32,270	6,674
1980	562,316	138,426	525,661	129,754	502,639	123,885	23,022	5,869	36,655	8,671
1981	547,593	151,509	507,777	140,990	484,427	134,299	23,350	6,691	39,816	10,518
1982	514,772	155,876	474,003	144,207	451,159	137,068	22,844	7,139	40,769	11,669
1983	400,298	123,559	363,946	112,979	339,367	104,956	24,579	8,022	36,352	10,581
1984	382,411	122,957	346,319	112,002	318,076	102,391	28,243	9,612	36,092	10,995
1985	371,659	123,557	335,085	112,117	306,004	101,812	29,081	10,304	36,574	11,440
1986	350,546	118,602	315,572	107,470	286,290	96,887	29,282	10,583	34,974	11,132
1987	340,940	115,967	307,581	104,888	278,582	93,871	28,999	11,017	33,359	11,079
1988	317,761	116,902	285,265	105,596	256,463	94,096	28,802	11,500	32,496	11,306
1989	312,079	120,970	280,006	109,184	251,646	97,170	28,360	12,014	32,073	11,786
1990	303,923	124,340	272,526	112,103	244,965	99,683	27,561	12,420	31,397	12,237
1991	300,661	127,510	269,679	114,962	242,379	102,085	27,300	12,877	30,982	12,548
1992	294,716	128,748	263,630	115,884	236,990	102,840	26,640	13,045	30,546	12,864
1993	289,350	129,752	259,320	116,771	232,794	103,365	26,526	13,407	30,030	12,981
1994	283,072	131,463	253,928	118,399	227,709	104,658	26,219	13,741	29,144	13,064
1995	275,020	131,430	247,113	118,550	221,494	104,664	25,619	13,886	27,907	12,881
1996	242,135	124,678	218,171	112,627	193,664	98,799	24,507	13,828	23,964	12,051
1997	230,222	122,488	207,658	110,774	184,184	97,120	23,474	13,654	22,564	11,714
1998	220,610	120,247	199,447	109,001	176,660	95,491	22,787	13,510	21,163	11,246
1999	212,401	120,157	192,544	109,195	170,572	95,732	21,972	13,463	19,857	10,962
2000	203,052	120,812	184,397	109,941	164,420	97,063	19,977	12,878	18,655	10,871
2001	197,375	122,526	179,413	111,539	160,186	98,672	19,227	12,867	17,962	10,987
2002	194,117	124,267	176,447	113,097	158,020	100,413	18,427	12,685	17,670	11,170
2003	190,252	126,278	172,955	114,914	154,990	102,158	17,965	12,756	17,297	11,364
2004	183,829	126,734	167,234	115,343	150,681	103,150	16,553	12,193	16,595	11,391
2005	178,396	129,246	162,455	117,756	146,228	105,212	16,227	12,544	15,941	11,490
2006	171,453	129,721	156,304	118,314	140,615	105,653	15,689	12,661	15,149	11,407
2007	164,665	128,742	150,214	117,471	135,146	104,935	15,068	12,536	14,451	11,271
2008	159,610	133,261	145,640	121,615	130,954	108,544	14,686	13,071	13,970	11,646
2009	159,870	134,547	145,784	122,724	130,564	109,017	15,220	13,707	14,086	11,823
2010	158,061	134,179	144,365	122,638	129,239	108,817	15,126	13,821	13,696	11,541

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: (410) 965-0090 or statistics@ssa.gov.

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 2010

Age	Number	Average monthly benefit (dollars)	Benefits not reduced due to early retirement of widow						Benefits reduced due to early retirement of widow	
			Number	Average monthly benefit (dollars)	Benefits not limited due to early retirement of deceased spouse		Benefits limited due to early retirement of deceased spouse		Number	Average monthly benefit (dollars)
					Number	Average monthly benefit (dollars)	Number	Average monthly benefit (dollars)		
All nondisabled widows aged 65 or older	3,551,714	1,137.50	1,645,503	1,228.00	767,890	1,386.70	877,613	1,089.20	^a 1,906,211	1,059.40
65–69	603,782	1,221.70	74,389	1,437.80	51,617	1,522.20	22,772	1,246.40	529,393	1,191.30
65	109,050	1,148.40	79	984.10	69	1,009.00	10	812.40	108,971	1,148.50
66	123,203	1,242.40	11,584	1,519.40	9,084	1,577.70	2,500	1,307.50	111,619	1,213.70
67	131,012	1,257.50	18,669	1,486.90	13,673	1,559.80	4,996	1,287.50	112,343	1,219.40
68	126,480	1,242.00	21,267	1,428.20	14,363	1,513.70	6,904	1,250.40	105,213	1,204.40
69	114,037	1,205.60	22,790	1,366.60	14,428	1,462.60	8,362	1,200.90	91,247	1,165.40
70–74	516,530	1,134.30	158,234	1,244.00	84,394	1,339.60	73,840	1,134.70	358,296	1,085.80
70	100,279	1,170.50	23,883	1,304.40	13,978	1,399.60	9,905	1,170.10	76,396	1,128.70
71	99,093	1,148.60	28,309	1,266.10	15,890	1,357.10	12,419	1,149.60	70,784	1,101.60
72	103,283	1,129.70	31,648	1,243.60	17,029	1,330.00	14,619	1,143.10	71,635	1,079.30
73	103,770	1,115.90	34,637	1,224.00	17,553	1,319.30	17,084	1,126.10	69,133	1,061.70
74	110,105	1,110.20	39,757	1,209.80	19,944	1,309.80	19,813	1,109.00	70,348	1,053.90
75–79	624,211	1,110.90	284,287	1,212.30	134,136	1,332.30	150,151	1,105.10	339,924	1,026.10
75	116,559	1,108.20	45,821	1,211.00	22,525	1,317.60	23,296	1,108.00	70,738	1,041.50
76	122,144	1,113.60	51,962	1,218.50	25,474	1,332.30	26,488	1,109.10	70,182	1,035.90
77	120,618	1,110.20	55,103	1,213.80	26,363	1,332.70	28,740	1,104.80	65,515	1,023.10
78	129,840	1,108.60	62,860	1,208.00	28,768	1,332.70	34,092	1,102.80	66,980	1,015.30
79	135,050	1,113.50	68,541	1,211.20	31,006	1,342.20	37,535	1,102.90	66,509	1,012.90
80–84	731,220	1,112.90	411,800	1,207.30	181,417	1,355.80	230,383	1,090.40	319,420	991.30
80	145,436	1,117.80	76,648	1,214.40	34,172	1,351.80	42,476	1,103.80	68,788	1,010.10
81	144,599	1,117.00	78,860	1,210.70	34,996	1,351.60	43,864	1,098.20	65,739	1,004.50
82	146,893	1,112.30	83,104	1,205.50	36,506	1,354.20	46,598	1,089.10	63,789	990.90
83	149,184	1,111.80	86,456	1,206.80	37,658	1,361.70	48,798	1,087.20	62,728	980.80
84	145,108	1,106.00	86,732	1,200.30	38,085	1,359.20	48,647	1,076.00	58,376	965.80
85–89	636,868	1,112.90	405,523	1,206.90	175,282	1,392.30	230,241	1,065.80	231,345	948.20
85	140,017	1,108.50	85,986	1,200.50	36,835	1,371.30	49,151	1,072.50	54,031	962.10
86	137,577	1,104.80	86,055	1,196.80	37,139	1,373.60	48,916	1,062.50	51,522	951.10
87	128,025	1,109.30	81,568	1,202.80	35,219	1,389.80	46,349	1,060.80	46,457	944.90
88	118,914	1,116.60	77,452	1,210.00	33,700	1,401.30	43,752	1,062.60	41,462	942.20
89	112,335	1,128.70	74,462	1,227.20	32,389	1,430.60	42,073	1,070.60	37,873	935.00
90 or older	439,103	1,140.00	311,270	1,239.10	141,044	1,450.00	170,226	1,064.30	127,833	898.90

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

a. Includes 136,899 widows with benefits also limited due to early retirement of deceased spouse.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 with and without reduction for early retirement, by sex and primary insurance amount, December 2010

Sex and primary insurance amount (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All dually entitled retired workers	6,679,529	100.0	5,587,382	100.0	1,092,147	100.0
Less than 250.00	352,576	5.3	302,244	5.4	50,332	4.6
250.00–299.90	266,584	4.0	233,796	4.2	32,788	3.0
300.00–349.90	291,177	4.4	254,756	4.6	36,421	3.3
350.00–399.90	286,073	4.3	249,665	4.5	36,408	3.3
400.00–449.90	326,121	4.9	279,836	5.0	46,285	4.2
450.00–499.90	280,370	4.2	241,152	4.3	39,218	3.6
500.00–549.90	308,463	4.6	263,243	4.7	45,220	4.1
550.00–599.90	459,353	6.9	383,603	6.9	75,750	6.9
600.00–649.90	483,929	7.2	402,275	7.2	81,654	7.5
650.00–699.90	548,342	8.2	460,969	8.3	87,373	8.0
700.00–749.90	515,334	7.7	432,411	7.7	82,923	7.6
750.00–799.90	468,070	7.0	392,303	7.0	75,767	6.9
800.00–849.90	382,300	5.7	316,876	5.7	65,424	6.0
850.00–899.90	318,742	4.8	261,723	4.7	57,019	5.2
900.00–949.90	264,038	4.0	215,002	3.8	49,036	4.5
950.00–999.90	212,936	3.2	171,443	3.1	41,493	3.8
1,000.00–1,049.90	173,872	2.6	138,221	2.5	35,651	3.3
1,050.00–1,099.90	140,669	2.1	110,507	2.0	30,162	2.8
1,100.00–1,149.90	112,697	1.7	88,321	1.6	24,376	2.2
1,150.00–1,199.90	93,246	1.4	73,418	1.3	19,828	1.8
1,200.00–1,249.90	77,274	1.2	61,373	1.1	15,901	1.5
1,250.00–1,299.90	64,825	1.0	51,940	0.9	12,885	1.2
1,300.00–1,349.90	53,397	0.8	43,220	0.8	10,177	0.9
1,350.00–1,399.90	42,599	0.6	34,640	0.6	7,959	0.7
1,400.00–1,449.90	35,273	0.5	28,610	0.5	6,663	0.6
1,450.00–1,499.90	27,859	0.4	22,438	0.4	5,421	0.5
1,500.00 or more	93,410	1.4	73,397	1.3	20,013	1.8
Men	154,879	100.0	117,648	100.0	37,231	100.0
Less than 250.00	6,200	4.0	3,618	3.1	2,582	6.9
250.00–299.90	3,723	2.4	2,421	2.1	1,302	3.5
300.00–349.90	3,990	2.6	2,647	2.2	1,343	3.6
350.00–399.90	3,919	2.5	2,669	2.3	1,250	3.4
400.00–449.90	4,213	2.7	2,806	2.4	1,407	3.8
450.00–499.90	3,575	2.3	2,479	2.1	1,096	2.9
500.00–549.90	3,822	2.5	2,657	2.3	1,165	3.1
550.00–599.90	5,557	3.6	3,746	3.2	1,811	4.9
600.00–649.90	6,374	4.1	4,301	3.7	2,073	5.6
650.00–699.90	7,659	4.9	5,363	4.6	2,296	6.2
700.00–749.90	7,786	5.0	5,539	4.7	2,247	6.0
750.00–799.90	7,763	5.0	5,643	4.8	2,120	5.7
800.00–849.90	7,277	4.7	5,328	4.5	1,949	5.2
850.00–899.90	6,818	4.4	5,125	4.4	1,693	4.5
900.00–949.90	6,189	4.0	4,717	4.0	1,472	4.0
950.00–999.90	5,535	3.6	4,300	3.7	1,235	3.3
1,000.00–1,049.90	5,113	3.3	4,034	3.4	1,079	2.9
1,050.00–1,099.90	4,845	3.1	3,856	3.3	989	2.7
1,100.00–1,149.90	4,671	3.0	3,859	3.3	812	2.2
1,150.00–1,199.90	4,763	3.1	3,946	3.4	817	2.2
1,200.00–1,249.90	4,549	2.9	3,801	3.2	748	2.0
1,250.00–1,299.90	4,429	2.9	3,756	3.2	673	1.8
1,300.00–1,349.90	4,413	2.8	3,766	3.2	647	1.7
1,350.00–1,399.90	4,369	2.8	3,808	3.2	561	1.5
1,400.00–1,449.90	4,367	2.8	3,793	3.2	574	1.5
1,450.00–1,499.90	3,874	2.5	3,313	2.8	561	1.5
1,500.00 or more	19,086	12.3	16,357	13.9	2,729	7.3

(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 with and without reduction for early retirement, by sex and primary insurance amount, December 2010—Continued

Sex and primary insurance amount (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	6,524,650	100.0	5,469,734	100.0	1,054,916	100.0
Less than 250.00	346,376	5.3	298,626	5.5	47,750	4.5
250.00–299.90	262,861	4.0	231,375	4.2	31,486	3.0
300.00–349.90	287,187	4.4	252,109	4.6	35,078	3.3
350.00–399.90	282,154	4.3	246,996	4.5	35,158	3.3
400.00–449.90	321,908	4.9	277,030	5.1	44,878	4.3
450.00–499.90	276,795	4.2	238,673	4.4	38,122	3.6
500.00–549.90	304,641	4.7	260,586	4.8	44,055	4.2
550.00–599.90	453,796	7.0	379,857	6.9	73,939	7.0
600.00–649.90	477,555	7.3	397,974	7.3	79,581	7.5
650.00–699.90	540,683	8.3	455,606	8.3	85,077	8.1
700.00–749.90	507,548	7.8	426,872	7.8	80,676	7.6
750.00–799.90	460,307	7.1	386,660	7.1	73,647	7.0
800.00–849.90	375,023	5.7	311,548	5.7	63,475	6.0
850.00–899.90	311,924	4.8	256,598	4.7	55,326	5.2
900.00–949.90	257,849	4.0	210,285	3.8	47,564	4.5
950.00–999.90	207,401	3.2	167,143	3.1	40,258	3.8
1,000.00–1,049.90	168,759	2.6	134,187	2.5	34,572	3.3
1,050.00–1,099.90	135,824	2.1	106,651	1.9	29,173	2.8
1,100.00–1,149.90	108,026	1.7	84,462	1.5	23,564	2.2
1,150.00–1,199.90	88,483	1.4	69,472	1.3	19,011	1.8
1,200.00–1,249.90	72,725	1.1	57,572	1.1	15,153	1.4
1,250.00–1,299.90	60,396	0.9	48,184	0.9	12,212	1.2
1,300.00–1,349.90	48,984	0.8	39,454	0.7	9,530	0.9
1,350.00–1,399.90	38,230	0.6	30,832	0.6	7,398	0.7
1,400.00–1,449.90	30,906	0.5	24,817	0.5	6,089	0.6
1,450.00–1,499.90	23,985	0.4	19,125	0.3	4,860	0.5
1,500.00 or more	74,324	1.1	57,040	1.0	17,284	1.6

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 1952–2010

Year	Total	Women						Men				
		Subtotal		Wife's benefit		Widow's benefit		Parent's benefit	Subtotal	Husband's benefit	Widower's benefit	Parent's benefit
		Number	Percentage of all women retired workers	Number	Percentage of all women entitled to wife's benefit because of age	Number	Percentage of all women entitled to widow's benefit					
1952	36,132	35,402	6.0	14,131	6.0	20,850	4.4	421	730	258	83	389
1953	54,798	53,631	6.8	23,355	2.7	29,668	5.2	608	1,167	529	148	490
1954	79,689	77,978	8.0	34,225	3.4	42,899	6.3	854	1,711	827	257	627
1955	108,551	106,320	8.7	49,637	4.2	55,664	7.4	1,019	2,231	1,224	342	665
1956	143,284	140,603	9.1	68,766	4.8	70,601	7.2	1,236	2,681	1,542	426	713
1957	194,501	190,951	9.6	102,522	5.6	86,951	7.4	1,478	3,550	2,152	578	820
1958	229,599	225,790	9.8	124,504	6.1	99,669	7.5	1,617	3,809	2,421	634	754
1959	268,900	264,434	10.2	141,831	6.4	120,458	8.0	2,145	4,466	2,794	772	900
1960	307,736	302,646	10.6	159,032	6.8	141,218	8.4	2,396	5,090	3,197	911	982
1961	335,243	330,727	10.5	159,587	6.6	169,264	9.1	1,876	4,516	2,652	1,090	774
1962	427,085	421,535	12.1	204,445	7.9	214,371	10.4	2,719	5,550	3,229	1,330	991
1963	502,839	496,639	13.2	138,081	8.9	255,408	11.3	3,150	6,200	3,597	1,543	1,060
1964	577,954	571,144	14.2	269,657	9.9	297,929	12.1	3,558	6,810	3,940	1,752	1,118
1965	618,730	611,610	14.3	^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	--	--	--	--	--	--	--	--	--	--	--	--
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 1952–2010—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	Percentage of all women entitled to widow's benefit					
2000	6,009,800	5,896,390	42.9	2,568,470	48.2	3,327,360	41.6	560	113,410	24,660	88,720	30	
2001	6,076,350	5,961,580	42.9	2,583,730	48.9	3,377,330	42.4	520	114,770	25,570	89,170	30	
2002	6,134,800	6,016,680	42.7	2,591,820	49.5	3,424,390	43.0	470	118,120	27,090	91,000	30	
2003	6,183,070	6,063,250	42.4	2,602,590	50.1	3,460,280	43.7	380	119,820	28,160	91,640	20	
2004	6,229,670	6,107,410	42.0	2,618,980	50.7	3,488,020	44.3	410	122,260	29,070	93,170	20	
2005	6,289,650	6,164,730	41.6	2,650,260	51.4	3,514,100	44.9	370	124,920	30,070	94,810	40	
2006	6,347,442	6,216,955	41.2	2,676,186	52.1	3,540,363	45.6	406	130,487	31,650	98,794	43	
2007	6,406,313	6,271,488	40.7	2,706,165	52.8	3,564,946	46.1	377	134,825	33,613	101,168	44	
2008	6,474,588	6,334,322	40.0	2,745,455	53.8	3,588,472	46.7	395	140,266	36,136	104,085	45	
2009	6,589,036	6,442,116	39.2	2,822,655	54.8	3,619,057	47.3	404	146,920	39,640	107,239	41	
2010	6,679,529	6,524,650	38.4	2,874,713	55.6	3,649,546	47.3	391	154,879	43,569	111,267	43	

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1993–2005 are based on a 10 percent sample. All other years are 100 percent data.

NOTE: -- = not available.

a. Distributions by type of secondary benefit are estimated.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

Type of secondary benefit	Number	Average monthly benefit (dollars)		
		Combined benefit	Retired-worker benefit	Reduced secondary benefit
All dually entitled retired workers	6,679,529	1,053.10	587.90	465.20
Wives and husbands	2,918,282	723.00	490.60	232.40
Wives of—	2,874,713	723.80	490.50	233.30
Retired workers	2,830,226	724.60	491.00	233.60
Disabled workers	44,487	673.10	455.90	217.20
Husbands of—	43,569	668.10	495.70	172.40
Retired workers	41,551	671.90	498.40	173.50
Disabled workers	2,018	589.60	439.40	150.30
Widow(er)s	3,760,813	1,309.30	663.50	645.80
Widows	3,649,546	1,311.30	655.40	655.90
Widowers	111,267	1,242.20	929.50	312.70
Parents	434	1,248.70	567.30	681.40

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

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 2,918,282	^b 3,760,813	720.00	1,313.40	68	52
Less than 200.00	7,068	1,850	150.90	154.00	76	74
200.00–249.90	8,650	2,020	228.50	226.60	75	72
250.00–299.90	17,175	3,297	276.90	275.90	73	70
300.00–349.90	25,766	5,572	326.00	326.90	71	69
350.00–399.90	35,666	6,620	376.30	375.20	69	68
400.00–449.90	50,941	9,822	426.30	423.70	67	66
450.00–499.90	75,146	13,565	476.60	476.60	67	65
500.00–549.90	123,177	19,390	527.10	525.90	68	65
550.00–599.90	210,548	26,750	576.90	576.20	68	65
600.00–649.90	353,330	34,342	626.80	626.00	69	65
650.00–699.90	416,574	40,930	675.00	675.50	70	65
700.00–749.90	400,271	49,597	724.50	725.50	70	65
750.00–799.90	366,035	59,573	774.60	775.70	69	64
800.00–849.90	291,332	68,378	823.30	825.60	69	63
850.00–899.90	187,269	82,154	872.90	875.50	68	62
900.00–949.90	123,857	98,159	923.60	925.80	66	62
950.00–999.90	85,783	116,179	973.50	975.80	65	60
1,000.00–1,049.90	59,535	140,741	1,023.30	1,025.50	64	59
1,050.00–1,099.90	41,985	169,408	1,073.40	1,075.60	63	58
1,100.00–1,149.90	23,977	198,197	1,122.30	1,126.00	63	56
1,150.00–1,199.90	11,191	233,438	1,167.90	1,175.70	62	54
1,200.00–1,249.90	814	240,348	1,221.20	1,225.10	48	53
1,250.00–1,299.90	497	253,877	1,274.70	1,275.40	46	52
1,300.00–1,349.90	320	265,598	1,324.70	1,324.70	42	51
1,350.00–1,399.90	209	225,399	1,374.30	1,374.20	38	50
1,400.00–1,449.90	193	196,409	1,422.90	1,424.50	41	50
1,450.00–1,499.90	153	179,774	1,472.10	1,474.50	37	48
1,500.00 or more	820	1,019,426	1,757.70	1,750.60	34	44

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

a. Includes 43,569 husbands.

b. Includes 111,267 widowers.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

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 2,918,202	100.0	6.3	6.0	6.7	6.8	6.7	6.7	8.7	12.0	11.2	9.3	7.0	12.4
Less than 200.00	7,066	100.0	99.9	0.1	...	...	...	...	...	...	...	...	...	...
200.00–249.90	8,647	100.0	65.4	34.5	...	...	...	...	...	...	...	...	...	...
250.00–299.90	17,175	100.0	43.8	32.4	23.7	0.1	...	...	...	...	...	...	...	...
300.00–349.90	25,764	100.0	31.1	25.1	26.4	17.3	...	...	...	...	...	...	...	...
350.00–399.90	35,663	100.0	23.4	19.6	21.9	21.7	13.4	...	...	...	...	...	...	...
400.00–449.90	50,935	100.0	18.7	15.9	18.4	19.0	17.4	10.6	...	...	...	...	...	...
450.00–499.90	75,144	100.0	14.6	13.5	15.0	15.6	15.1	14.8	11.4	...	...	...	...	...
500.00–549.90	123,171	100.0	11.2	11.0	11.9	12.1	12.0	12.2	16.8	12.8	...	...	...	...
550.00–599.90	210,544	100.0	9.1	9.4	9.5	9.4	9.4	9.9	14.5	18.6	10.1	...	...	...
600.00–649.90	353,323	100.0	6.8	7.0	7.8	8.0	8.2	8.5	13.3	16.8	15.6	7.9	...	...
650.00–699.90	416,566	100.0	4.7	5.1	6.1	6.6	6.9	7.3	11.1	16.1	15.7	14.1	6.4	...
700.00 or more	1,594,204	100.0	3.2	3.5	4.3	4.7	5.0	5.3	6.3	10.6	11.7	11.6	11.2	22.7
Dually entitled widow(er)s														
All	^b 3,760,634	100.0	3.7	3.8	4.3	4.6	4.0	4.7	6.7	7.1	7.1	6.9	6.2	41.0
Less than 200.00	1,850	100.0	99.8	0.1	...	...	...	...	...	...	...	...	...	...
200.00–249.90	2,020	100.0	69.5	30.3	0.1	...	...	...	...	...	...	...	...	...
250.00–299.90	3,296	100.0	48.2	30.4	21.3	...	...	...	...	...	...	...	...	...
300.00–349.90	5,572	100.0	33.8	23.5	25.6	17.1	...	...	...	...	...	...	...	...
350.00–399.90	6,619	100.0	26.2	18.8	20.7	23.3	11.0	...	...	...	...	...	...	...
400.00–449.90	9,822	100.0	20.8	15.0	17.9	21.4	15.2	9.6	...	...	...	...	...	...
450.00–499.90	13,565	100.0	18.0	12.9	14.5	15.8	13.4	15.1	10.2	...	...	...	...	...
500.00–549.90	19,390	100.0	15.1	10.9	12.2	13.2	11.1	13.1	15.9	8.4	...	...	...	...
550.00–599.90	26,749	100.0	11.7	9.1	10.0	11.5	9.9	12.0	14.2	14.3	7.4	...	...	...
600.00–649.90	34,340	100.0	9.6	7.6	8.6	9.7	8.4	10.2	13.1	13.2	13.0	6.6	...	...
650.00–699.90	40,927	100.0	8.0	6.3	7.6	8.2	7.1	8.9	12.0	12.4	12.3	11.5	5.7	...
700.00–749.90	49,594	100.0	6.5	5.7	6.3	7.3	6.4	8.2	10.6	11.3	11.8	11.0	10.2	4.7
750.00–799.90	59,572	100.0	5.8	5.1	5.9	6.4	5.8	7.0	9.9	10.4	10.8	10.6	9.8	12.5
800.00–849.90	68,373	100.0	5.1	4.4	5.4	6.0	5.3	6.2	9.1	9.8	10.2	10.1	9.3	19.2
850.00–899.90	82,152	100.0	4.5	4.1	4.9	5.5	4.8	5.8	8.2	9.2	9.7	9.8	8.9	24.6
900.00–949.90	98,155	100.0	3.8	3.8	4.4	5.2	4.5	5.6	7.6	8.4	8.9	9.1	8.7	29.9
950.00–999.90	116,174	100.0	3.6	3.5	4.2	4.9	4.3	5.4	7.4	8.0	8.4	8.6	8.0	33.7
1,000.00–1,049.90	140,728	100.0	3.3	3.4	4.0	4.8	4.2	5.1	7.0	7.6	7.9	8.1	7.7	37.0
1,050.00–1,099.90	169,395	100.0	3.2	3.3	4.0	4.4	3.9	4.7	7.0	7.2	7.5	7.5	7.3	40.0
1,100.00–1,149.90	198,187	100.0	3.3	3.6	4.1	4.5	3.8	4.7	6.9	7.0	7.1	7.2	6.8	40.9
1,150.00–1,199.90	233,430	100.0	3.6	3.8	4.3	4.4	3.9	4.9	6.9	7.0	6.9	7.1	6.4	41.0
1,200.00–1,249.90	240,342	100.0	3.4	3.9	4.1	4.3	3.6	4.6	6.8	6.9	6.9	6.8	6.3	42.4
1,250.00–1,299.90	253,866	100.0	3.3	3.8	4.0	4.2	3.7	4.4	6.7	6.9	6.8	6.7	6.1	43.5
1,300.00–1,349.90	265,585	100.0	3.3	3.6	3.9	4.0	3.6	4.2	6.8	7.0	6.8	6.7	6.1	44.1
1,350.00–1,399.90	225,391	100.0	3.0	3.3	3.7	3.9	3.4	4.1	6.6	6.9	6.7	6.6	6.0	45.7
1,400.00–1,449.90	196,401	100.0	2.7	3.2	3.7	3.8	3.4	4.0	6.2	6.7	6.8	6.5	5.9	47.1
1,450.00–1,499.90	179,768	100.0	2.8	3.3	3.7	3.8	3.4	4.0	5.9	6.4	6.6	6.3	5.9	47.8
1,500.00 or more	1,019,371	100.0	2.5	2.9	3.5	3.7	3.4	3.7	5.3	6.0	6.1	6.0	5.5	51.3

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

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

... = not applicable.

a. Includes 43,569 husbands.

b. Includes 111,267 widowers.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H1—Number and average monthly family benefit for selected family groups, December 1945–2010, selected years

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	
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
2004	27,114	12,654	14,460	2,416	4,216	93	59	26	5,133	2,668	2,464	38	53	60
2005	27,659	12,916	14,743	2,368	4,140	90	56	26	5,423	2,797	2,626	36	51	67
2006	28,198	13,174	15,024	2,324	4,059	89	54	24	5,703	2,918	2,784	36	47	71
2007	28,791	13,461	15,330	2,281	3,995	86	52	23	5,975	3,042	2,933	33	43	72
2008	29,570	13,847	15,723	2,216	3,925	84	50	22	6,279	3,181	3,098	33	42	78
2009	30,416	14,227	16,189	2,182	3,851	85	50	22	6,396	3,261	3,135	31	40	76
2010	31,901	15,004	16,897	2,153	3,802	85	50	21	6,971	3,517	3,454	31	41	73
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 1945–2010, 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	
<i>Average monthly family benefit (dollars) (cont.)</i>														
1995	704.80	803.00	621.80	1,220.60	681.60	1,184.50	1,365.50	1,299.80	667.60	757.40	544.80	1,205.50	1,130.90	1,159.90
1996	730.00	831.10	644.20	1,262.10	708.70	1,222.50	1,450.60	1,347.20	690.60	785.30	566.00	1,245.90	1,148.50	1,200.60
1997	750.20	853.70	663.10	1,294.60	733.20	1,250.30	1,502.60	1,358.00	708.00	806.60	583.60	1,280.20	1,165.90	1,238.50
1998	765.10	870.50	676.40	1,317.70	750.90	1,277.00	1,537.70	1,393.20	720.00	820.20	597.40	1,300.40	1,189.40	1,261.90
1999	789.80	898.60	697.70	1,356.80	776.60	1,325.40	1,590.40	1,446.30	741.20	844.50	618.50	1,344.90	1,224.20	1,295.30
2000	830.10	945.90	730.30	1,419.90	812.30	1,387.90	1,675.40	1,513.20	773.60	880.70	649.40	1,394.20	1,274.30	1,355.50
2001	860.20	979.90	756.60	1,465.50	842.90	1,439.70	1,755.10	1,600.60	801.20	911.00	676.60	1,440.70	1,317.90	1,405.70
2002	881.30	1,003.80	774.60	1,494.20	863.40	1,473.20	1,812.10	1,664.50	820.50	931.90	696.40	1,468.10	1,352.50	1,449.20
2003	908.70	1,035.20	798.30	1,534.90	890.50	1,525.40	1,881.00	1,724.20	848.00	962.50	722.00	1,517.70	1,409.60	1,497.50
2004	941.90	1,073.20	826.90	1,585.40	922.40	1,588.30	1,952.80	1,803.40	880.20	998.00	752.50	1,572.90	1,463.30	1,566.50
2005	989.00	1,126.80	868.30	1,660.30	969.10	1,663.30	2,061.30	1,885.40	923.20	1,045.60	792.80	1,652.00	1,540.90	1,668.50
2006	1,031.30	1,174.70	905.70	1,726.10	1,009.80	1,737.10	2,146.70	1,980.80	961.10	1,089.10	827.00	1,722.20	1,599.90	1,743.80
2007	1,065.90	1,213.50	936.20	1,775.90	1,042.40	1,791.90	2,221.10	2,051.10	987.40	1,116.90	853.10	1,775.80	1,655.60	1,796.60
2008	1,140.20	1,297.40	1,001.90	1,894.30	1,114.20	1,910.50	2,371.80	2,187.80	1,045.20	1,179.70	907.20	1,879.20	1,752.60	1,911.80
2009	1,153.40	1,312.40	1,013.70	1,912.90	1,125.20	1,939.80	2,403.30	2,212.40	1,058.40	1,187.80	923.80	1,908.80	1,778.40	1,953.50
2010	1,164.00	1,321.60	1,024.00	1,930.30	1,135.50	1,956.30	2,418.40	2,220.10	1,049.70	1,178.10	918.80	1,906.30	1,787.00	1,960.70

SOURCE: Social Security Administration, Master Beneficiary Record. Data for 1945–1984 are based on various sampling rates. Data for 1985–2005 are based on a 10 percent sample. All other years are 100 percent data.

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

... = not applicable.

- a. Wife's entitlement based on age.
- b. Wife's entitlement based on care of children.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H2—Number, average primary insurance amount, and average monthly family benefit for selected family groups, December 2010

Family group	Number (thousands)		Average primary insurance amount (dollars)	Average monthly family benefit (dollars)
	Families	Beneficiaries		
<i>Retired-worker families</i>				
Worker only	31,901	31,901	1,205.60	1,164.00
Men	15,004	15,004	1,486.80	1,321.60
Full benefit	4,178	4,178	1,515.90	1,555.30
Reduced benefit	10,825	10,825	1,475.60	1,231.40
Women	16,897	16,897	955.90	1,024.00
Full benefit	3,978	3,978	1,032.20	1,180.70
Reduced benefit	12,919	12,919	932.30	975.80
Worker and wife	2,153	4,312	1,472.40	1,930.30
Full worker benefit	729	1,461	1,492.40	2,176.10
Reduced worker benefit	1,424	2,851	1,462.20	1,804.30
Worker and husband	57	115	789.80	1,089.50
Worker and children	394	861	1,405.80	1,952.00
Male worker	337	738	1,459.00	2,023.20
Full worker benefit	92	199	1,496.50	2,278.50
Reduced worker benefit	245	539	1,445.00	1,927.70
Female worker	57	123	1,091.40	1,531.80
Full worker benefit	15	32	1,101.20	1,710.70
Reduced worker benefit	42	91	1,088.00	1,468.70
Worker, wife, and children	88	287	1,486.20	2,419.10
Worker, wife, and 1 child	73	220	1,494.10	2,419.00
Full worker benefit	22	65	1,506.60	2,651.20
Reduced worker benefit	51	155	1,488.90	2,321.70
Worker, wife, and 2 or more children	15	67	1,448.00	2,419.60
Full worker benefit	4	19	1,506.10	2,752.90
Reduced worker benefit	11	48	1,425.20	2,288.70
<i>Survivor families</i>				
Nondisabled widow(er) only	3,866	3,866	1,353.60	1,132.90
Full benefit	1,587	1,587	1,312.60	1,227.10
Reduced benefit	2,280	2,280	1,382.10	1,067.40
Nondisabled widow(er) and children	93	194	1,264.30	1,962.10
Full benefit	51	106	1,214.90	1,989.00
Reduced benefit	42	88	1,324.10	1,929.60
Disabled widow(er) only	220	220	1,348.50	681.30
Widowed mother or father and children	158	419	1,329.40	2,132.90
1 child	85	172	1,309.30	1,956.30
2 children	50	151	1,388.70	2,418.40
3 or more children	21	95	1,280.40	2,220.10
Children only	1,161	1,537	1,074.20	982.80
1 child	888	888	1,077.40	782.30
2 children	198	395	1,077.60	1,598.20
3 or more children	75	254	1,026.60	1,733.90
Parents	1	2	1,234.10	1,115.00
<i>Disabled-worker families</i>				
Worker only	6,971	6,971	1,054.30	1,049.70
Men	3,517	3,517	1,184.30	1,178.10
Women	3,454	3,454	921.80	918.80
Worker and spouse ^a	78	156	1,602.30	1,933.20
Worker and children	1,075	2,727	1,137.20	1,641.50
Male worker	641	1,635	1,210.00	1,765.90
Female worker	434	1,092	1,029.70	1,457.80
Worker, wife, and children	72	286	1,245.70	1,838.20
1 child	31	93	1,286.80	1,906.30
2 or more children	41	193	1,214.80	1,787.00
Worker, husband, and children	2	8	1,063.40	1,525.80

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

NOTES: The term "full benefit" applies to benefits not subject to actuarial reduction, and the term "reduced benefit" applies to benefits subject to actuarial reduction.

Totals do not necessarily equal the sum of rounded components.

a. 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: (410) 965-0090 or statistics@ssa.gov.

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 2010

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	15,003,590	16,897,331	2,153,082	72,921	15,219	3,517,056	3,453,630	31,080	41,339
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than 200.00	1.0	1.1	0.5	0.1	0.1	0.3	0.7	0.1	0.0
200.00–249.90	0.7	0.7	0.3	0.1	0.2	0.5	1.1	0.0	0.0
250.00–299.90	0.8	0.9	0.4	0.2	0.1	0.8	1.6	0.0	0.0
300.00–349.90	0.8	1.0	0.5	0.2	0.2	1.0	2.0	0.0	0.0
350.00–399.90	0.8	1.0	0.6	0.3	0.4	1.2	2.3	0.0	0.0
400.00–449.90	0.8	1.2	0.6	0.3	0.4	1.4	2.6	0.0	0.0
450.00–499.90	0.9	1.7	0.6	0.3	0.4	1.4	2.7	0.0	0.0
500.00–549.90	1.2	2.6	0.6	0.4	0.4	1.6	2.9	0.0	0.1
550.00–599.90	1.4	3.5	0.6	0.4	0.4	2.3	4.0	0.1	0.1
600.00–649.90	1.5	4.7	0.6	0.4	0.5	2.7	4.6	0.3	0.3
650.00–699.90	1.6	5.3	0.7	0.4	0.6	3.9	6.7	0.5	0.7
700.00–749.90	1.7	5.5	0.8	0.5	0.5	4.0	6.6	1.1	1.3
750.00–799.90	1.8	5.4	1.0	0.7	0.6	4.1	6.3	1.1	1.5
800.00–849.90	1.9	5.1	1.1	0.8	0.9	4.1	5.9	1.4	1.7
850.00–899.90	2.1	4.6	1.2	1.0	1.4	4.0	5.4	1.6	1.9
900.00–949.90	2.2	4.2	1.2	1.1	1.4	4.0	5.0	1.5	2.0
950.00–999.90	2.4	4.0	1.2	1.2	1.5	3.9	4.5	1.6	2.1
1,000.00–1,049.90	2.6	3.9	1.2	1.1	1.6	3.8	4.1	1.7	2.2
1,050.00–1,099.90	2.9	3.8	1.2	1.1	1.5	3.7	3.7	1.8	2.2
1,100.00–1,149.90	3.3	3.8	1.2	1.1	1.6	3.5	3.3	1.9	2.3
1,150.00–1,199.90	3.6	3.7	1.2	1.0	1.6	3.4	2.9	2.0	2.3
1,200.00–1,249.90	3.8	3.5	1.3	0.9	1.2	3.3	2.6	2.2	2.5
1,250.00–1,299.90	4.6	3.5	1.3	0.8	1.2	3.1	2.3	2.3	2.5
1,300.00–1,349.90	4.7	3.4	1.3	0.9	1.2	3.0	2.0	2.4	2.5
1,350.00–1,399.90	4.4	2.9	1.4	0.8	1.0	2.8	1.8	2.5	2.8
1,400.00–1,449.90	4.8	2.8	1.5	0.8	1.0	2.7	1.5	2.5	2.8
1,450.00–1,499.90	4.9	2.5	1.5	0.8	0.9	2.5	1.4	2.7	3.3
1,500.00–1,549.90	4.7	2.2	1.7	0.9	1.0	2.4	1.2	3.4	3.6
1,550.00–1,599.90	4.5	2.0	1.8	0.9	1.2	2.4	1.1	3.1	3.6
1,600.00–1,649.90	4.2	1.7	1.9	0.9	1.1	2.3	1.0	3.1	3.4
1,650.00–1,699.90	3.5	1.4	2.1	1.0	0.9	2.1	0.9	2.8	3.4
1,700.00–1,749.90	2.8	1.1	2.3	1.0	1.0	2.0	0.8	2.7	3.2
1,750.00–1,799.90	2.3	0.9	2.4	1.0	1.1	1.8	0.7	2.7	2.8
1,800.00–1,849.90	2.0	0.8	2.7	1.1	1.0	1.8	0.7	2.7	2.8
1,850.00–1,899.90	1.9	0.7	3.3	1.3	1.1	2.2	0.8	2.6	2.5
1,900.00–1,949.90	1.7	0.6	3.6	1.2	1.0	2.1	0.6	2.3	2.6
1,950.00–1,999.90	1.5	0.5	3.5	1.3	1.2	1.7	0.5	2.3	2.2
2,000.00–2,049.90	1.3	0.4	3.3	1.5	1.2	1.4	0.4	2.2	2.0
2,050.00–2,099.90	1.1	0.3	3.3	1.6	1.3	1.2	0.3	2.1	2.0
2,100.00–2,149.90	1.0	0.2	3.2	1.7	1.1	1.0	0.2	2.0	1.9
2,150.00–2,199.90	0.9	0.2	3.1	1.9	1.5	0.8	0.2	1.8	1.8
2,200.00–2,249.90	0.8	0.2	3.0	2.0	1.6	0.6	0.1	1.8	1.6

(Continued)

Table 5.H3—Percentage distribution of retired-worker and disabled-worker families, by monthly benefit for selected family groups, December 2010—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	^b 2.3	^b 0.4	2.8	2.3	1.8	^b 1.1	^b 0.2	1.8	1.6
2,300.00–2,349.90	2.8	2.3	1.7	...	...	1.7	1.3
2,350.00–2,399.90	2.7	2.5	1.8	...	...	1.8	1.4
2,400.00–2,449.90	2.5	2.6	1.8	...	...	1.6	1.2
2,450.00–2,499.90	2.2	2.7	2.0	...	...	1.7	1.2
2,500.00–2,549.90	2.0	2.7	2.0	...	...	1.4	1.1
2,550.00–2,599.90	1.8	2.7	2.2	...	...	1.4	1.1
2,600.00–2,649.90	1.6	2.6	1.9	...	...	1.4	0.9
2,650.00–2,699.90	1.4	2.5	1.9	...	...	1.3	1.0
2,700.00–2,749.90	1.3	2.4	1.8	...	...	1.3	0.9
2,750.00–2,799.90	1.2	2.4	1.8	...	...	1.5	1.1
2,800.00–2,849.90	1.1	2.3	2.1	...	...	1.4	1.2
2,850.00–2,899.90	1.0	2.5	2.1	...	...	1.4	1.1
2,900.00 or more	8.7	30.5	34.6	...	...	10.8	8.0
Average monthly family benefit (dollars)	1,321.60	1,024.00	1,930.30	2,419.00	2,419.60	1,178.10	918.80	1,896.50	1,779.40

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

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

... = not applicable.

- a. Cases involving actuarial reduction may be represented in all benefit intervals for which values are shown.
- b. \$2,250 or more.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H4—Percentage distribution of survivor families, by monthly benefit for selected family groups, December 2010

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	85,341	50,156	21,351	887,995	197,548	75,059	3,802,381	208,734
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	2.8	0.1	0.1	0.8	8.1
200.00–249.90	0.1	0.1	0.1	1.7	0.3	0.3	0.4	3.4
250.00–299.90	0.2	0.1	0.2	1.8	0.5	0.6	0.7	3.8
300.00–349.90	0.2	0.2	0.4	2.1	0.8	1.0	0.9	4.0
350.00–399.90	0.3	0.2	0.4	2.1	1.0	1.2	0.9	4.2
400.00–449.90	0.4	0.3	0.5	6.0	1.0	1.3	1.3	4.7
450.00–499.90	0.4	0.3	0.5	4.5	1.1	1.3	1.5	5.3
500.00–549.90	0.4	0.4	0.5	6.0	1.1	1.4	1.8	5.5
550.00–599.90	0.5	0.3	0.5	5.9	1.1	1.3	2.0	5.4
600.00–649.90	0.5	0.4	0.5	5.8	1.6	1.5	2.2	5.3
650.00–699.90	0.5	0.4	0.6	5.9	1.3	1.4	2.3	5.1
700.00–749.90	0.6	0.4	0.6	5.4	1.3	1.4	2.6	4.9
750.00–799.90	0.6	0.5	0.7	5.9	1.3	1.4	3.0	4.6
800.00–849.90	0.7	0.5	0.7	5.4	1.4	1.5	3.2	4.3
850.00–899.90	0.9	0.6	1.0	4.8	1.7	1.6	3.6	3.9
900.00–949.90	1.0	0.6	0.9	4.4	1.8	1.9	3.9	3.5
950.00–999.90	1.2	1.0	1.1	4.0	2.2	2.2	4.1	3.2
1,000.00–1,049.90	1.8	1.4	2.0	3.7	3.3	3.4	4.6	2.8
1,050.00–1,099.90	2.0	1.6	2.3	3.5	3.4	3.9	5.1	2.5
1,100.00–1,149.90	2.1	1.7	2.5	3.1	3.4	3.7	5.6	2.5
1,150.00–1,199.90	2.2	1.7	2.4	2.8	3.3	3.4	5.8	2.1
1,200.00–1,249.90	2.3	1.7	2.5	2.4	3.2	3.4	5.4	1.8
1,250.00–1,299.90	2.3	1.7	2.4	1.8	3.1	3.1	5.0	1.6
1,300.00–1,349.90	2.3	1.7	2.3	1.4	3.2	2.8	4.9	1.7
1,350.00–1,399.90	2.5	1.6	2.3	1.3	3.0	2.7	4.3	1.6
1,400.00–1,449.90	2.5	1.4	1.7	1.3	2.9	2.1	3.7	1.3
1,450.00–1,499.90	2.5	1.1	1.4	1.0	2.8	1.6	3.3	1.0
1,500.00–1,549.90	2.5	1.2	1.5	0.8	2.8	1.6	3.0	0.7
1,550.00–1,599.90	2.6	1.3	1.4	0.6	2.6	1.5	2.8	0.5
1,600.00–1,649.90	2.6	1.2	1.5	0.5	2.5	1.5	2.3	0.3
1,650.00–1,699.90	2.6	1.3	1.3	0.4	2.4	1.4	1.7	0.2
1,700.00–1,749.90	2.5	1.3	1.5	0.3	2.3	1.5	1.4	0.1
1,750.00–1,799.90	2.6	1.4	1.4	^a 0.4	2.1	1.4	1.1	^a 0.0
1,800.00–1,849.90	2.5	1.4	1.5	...	2.0	1.3	0.8	...
1,850.00–1,899.90	2.4	1.4	1.5	...	1.9	1.4	0.7	...
1,900.00–1,949.90	2.3	1.4	1.4	...	1.9	1.3	0.5	...
1,950.00–1,999.90	2.3	1.5	1.5	...	1.8	1.3	0.4	...
2,000.00–2,049.90	2.1	1.5	1.5	...	1.6	1.2	0.4	...
2,050.00–2,099.90	2.2	1.4	1.2	...	1.5	1.1	0.3	...
2,100.00–2,149.90	2.1	1.4	1.4	...	1.5	1.2	0.2	...
2,150.00–2,199.90	2.0	1.6	1.4	...	1.4	1.1	0.2	...
2,200.00–2,249.90	1.9	1.4	1.3	...	1.3	1.1	0.2	...

(Continued)

Table 5.H4—Percentage distribution of survivor families, by monthly benefit for selected family groups, December 2010—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	1.8	1.5	1.4	...	1.2	1.1	^b 0.6	...
2,300.00–2,349.90	1.8	1.5	1.3	...	1.2	1.1	...	...
2,350.00–2,399.90	1.8	1.5	1.2	...	1.1	1.0	...	...
2,400.00–2,449.90	1.7	1.6	1.4	...	1.1	1.1	...	...
2,450.00–2,499.90	1.6	1.6	1.4	...	1.0	1.0	...	...
2,500.00–2,549.90	1.5	1.6	1.6	...	0.9	1.1	...	...
2,550.00–2,599.90	1.5	2.1	1.6	...	0.8	1.3	...	...
2,600.00–2,649.90	1.4	2.5	2.0	...	0.8	1.4	...	...
2,650.00–2,699.90	1.3	2.2	1.9	...	0.8	1.3	...	...
2,700.00–2,749.90	1.3	2.2	1.8	...	0.7	1.2	...	...
2,750.00–2,799.90	1.7	2.1	1.9	...	0.9	1.1	...	...
2,800.00–2,849.90	1.8	1.9	1.7	...	0.9	1.1	...	...
2,850.00–2,899.90	1.6	1.8	1.3	...	0.9	1.0	...	...
2,900.00 or more	13.1	33.1	27.0	...	6.8	13.8	...	...
Average monthly family benefit (dollars)	1,956.30	2,418.40	2,220.10	782.30	1,598.20	1,733.90	1,135.50	691.20

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

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

... = not applicable.

a. \$1,750 or more.

b. \$2,250 or more.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J1—Estimated total annual benefits paid, by state or other area and program, 2010
(in millions of dollars)**

State or area	Total, OASDI	Retirement	Survivors	Disability
All areas	701,436	471,505	105,740	124,191
Alabama	12,716	7,456	2,045	3,215
Alaska	959	632	145	182
Arizona	14,128	9,982	1,876	2,270
Arkansas	7,749	4,649	1,152	1,948
California	64,379	44,796	9,298	10,285
Colorado	8,931	6,221	1,298	1,412
Connecticut	8,903	6,507	1,175	1,221
Delaware	2,395	1,662	318	415
District of Columbia	876	584	125	167
Florida	49,163	35,295	6,512	7,356
Georgia	18,714	12,101	2,852	3,761
Hawaii	2,940	2,224	362	354
Idaho	3,398	2,341	488	569
Illinois	27,533	18,847	4,427	4,259
Indiana	16,192	10,827	2,540	2,825
Iowa	7,662	5,409	1,224	1,029
Kansas	6,523	4,500	1,008	1,015
Kentucky	11,047	6,223	1,848	2,976
Louisiana	9,642	5,421	2,077	2,144
Maine	3,634	2,344	501	789
Maryland	11,445	7,963	1,699	1,783
Massachusetts	15,046	10,174	2,038	2,834
Michigan	27,354	18,175	4,201	4,978
Minnesota	11,694	8,327	1,644	1,723
Mississippi	7,201	4,182	1,177	1,842
Missouri	14,991	9,753	2,269	2,969
Montana	2,403	1,662	367	374
Nebraska	4,000	2,803	626	571
Nevada	5,352	3,796	672	884
New Hampshire	3,410	2,342	411	657
New Jersey	21,276	15,264	2,899	3,113
New Mexico	4,354	2,852	653	849
New York	44,751	30,813	6,128	7,810
North Carolina	22,604	15,005	2,942	4,657
North Dakota	1,487	1,014	284	189
Ohio	27,896	18,355	5,007	4,534
Oklahoma	8,895	5,680	1,451	1,764
Oregon	9,367	6,621	1,290	1,456
Pennsylvania	34,820	23,636	5,522	5,662
Rhode Island	2,674	1,840	329	505
South Carolina	11,915	7,766	1,633	2,516
South Dakota	1,880	1,328	305	247
Tennessee	15,913	10,129	2,406	3,378
Texas	43,212	27,797	7,506	7,909
Utah	4,197	2,932	636	629
Vermont	1,647	1,134	219	294
Virginia	16,755	11,259	2,430	3,066
Washington	14,679	10,272	1,996	2,411
West Virginia	5,748	3,191	1,065	1,492
Wisconsin	14,203	9,986	2,031	2,186
Wyoming	1,193	838	179	176

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

**Table 5.J1—Estimated total annual benefits paid, by state or other area and program, 2010
(in millions of dollars)—Continued**

State or area	Total, OASDI	Retirement	Survivors	Disability
Outlying areas				
American Samoa	47	18	13	16
Guam	123	74	29	20
Northern Mariana Islands	17	10	5	2
Puerto Rico	7,195	3,710	1,206	2,279
U.S. Virgin Islands	217	160	29	28
Foreign countries	3,987	2,623	1,170	194

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

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

Totals do not necessarily equal the sum of rounded components.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J2—Number, by state or other area, program, and type of benefit, December 2010

State or area	Total	Retirement			Survivors		Disability		
		Retired workers	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
All areas	54,031,968	34,593,080	2,316,536	579,859	4,445,547	1,912,789	8,203,951	160,300	1,819,906
Alabama	1,012,056	560,885	37,057	10,531	89,755	43,165	216,038	4,226	50,399
Alaska	78,208	49,275	2,599	1,555	5,164	4,557	12,119	220	2,719
Arizona	1,067,717	724,817	43,290	10,454	76,573	34,538	144,342	2,537	31,166
Arkansas	635,041	361,848	21,180	6,122	51,890	24,985	133,719	2,648	32,649
California	4,979,141	3,301,043	256,861	66,196	382,138	166,200	662,232	12,502	131,969
Colorado	693,341	465,625	30,971	6,593	53,330	22,694	94,404	1,381	18,343
Connecticut	622,167	437,382	20,313	6,742	43,106	19,326	77,298	944	17,056
Delaware	172,441	115,978	5,553	1,396	12,135	5,748	25,925	280	5,426
District of Columbia	74,417	48,173	1,723	826	5,283	3,731	12,843	35	1,803
Florida	3,784,225	2,617,763	151,058	38,102	276,138	107,433	488,461	8,384	96,886
Georgia	1,468,209	913,305	47,372	16,289	117,633	65,703	248,887	4,216	54,804
Hawaii	227,914	166,828	7,836	3,465	15,525	6,369	22,686	416	4,789
Idaho	269,293	177,043	11,924	2,741	20,126	8,716	38,716	883	9,144
Illinois	2,033,345	1,336,527	82,912	23,204	174,200	76,231	274,692	4,757	60,822
Indiana	1,191,768	756,433	45,009	11,329	99,180	45,714	186,817	3,458	43,828
Iowa	584,113	396,969	25,128	5,246	51,239	18,146	71,549	1,064	14,772
Kansas	488,765	322,703	18,535	4,489	40,179	17,436	69,044	919	15,460
Kentucky	894,473	475,681	38,406	7,998	85,108	35,296	199,732	5,599	46,653
Louisiana	790,617	414,008	46,392	9,473	93,272	43,355	142,796	4,523	36,798
Maine	299,875	185,849	10,965	2,662	22,473	8,287	55,525	913	13,201
Maryland	850,361	573,774	29,650	8,110	65,556	33,582	115,898	1,121	22,670
Massachusetts	1,140,830	739,823	38,580	11,191	81,322	33,854	187,321	2,022	46,717
Michigan	1,964,862	1,231,331	83,409	21,733	162,779	70,643	314,926	6,343	73,698
Minnesota	882,408	604,090	34,859	7,833	67,341	25,831	115,780	1,262	25,412
Mississippi	596,637	328,311	18,543	7,510	51,432	30,839	125,555	2,690	31,757
Missouri	1,166,223	725,690	41,538	10,716	94,195	43,734	202,465	3,270	44,615
Montana	192,701	128,616	8,464	2,022	15,650	6,382	26,077	550	4,940
Nebraska	308,790	208,052	12,925	2,782	26,264	9,838	39,846	511	8,572
Nevada	408,113	283,229	13,723	4,119	26,664	12,907	55,858	764	10,849
New Hampshire	254,752	167,720	7,426	2,020	15,956	6,751	42,504	496	11,879
New Jersey	1,472,335	1,017,596	51,068	16,057	109,435	46,755	185,970	3,163	42,291
New Mexico	360,242	223,015	17,459	3,952	28,839	14,644	58,641	1,243	12,449
New York	3,280,575	2,148,469	128,190	41,076	244,220	103,488	490,662	9,573	114,897
North Carolina	1,757,135	1,125,816	48,436	15,807	125,013	62,907	310,399	4,759	63,998
North Dakota	120,098	78,486	7,054	1,083	13,064	3,998	13,570	190	2,653
Ohio	2,124,650	1,322,265	108,284	19,825	211,503	77,606	313,105	6,116	65,946
Oklahoma	705,364	430,842	28,001	6,823	62,175	28,919	120,235	2,503	25,866
Oregon	712,216	486,588	28,745	7,548	53,660	19,153	97,786	1,900	16,836
Pennsylvania	2,577,714	1,675,278	105,001	22,747	228,505	81,546	372,365	7,241	85,031
Rhode Island	203,660	135,197	5,104	2,022	13,186	5,801	34,381	343	7,626
South Carolina	924,726	581,505	26,685	8,947	69,992	35,484	164,930	2,796	34,387
South Dakota	153,508	104,473	7,080	1,322	13,839	5,308	17,722	228	3,536
Tennessee	1,251,947	756,708	45,092	11,962	104,318	49,539	230,168	4,645	49,515
Texas	3,440,442	2,077,693	185,276	38,299	324,092	145,343	528,238	13,140	128,361
Utah	324,136	211,918	16,767	4,108	23,030	14,736	41,919	794	10,864
Vermont	128,619	83,840	4,502	1,395	9,296	3,575	20,774	262	4,975
Virginia	1,284,823	829,110	48,356	12,450	102,415	44,809	199,923	3,765	43,995
Washington	1,089,887	727,956	47,027	11,179	80,008	31,531	159,689	2,422	30,075
West Virginia	443,911	231,811	24,920	4,216	48,485	16,809	93,663	4,002	20,005
Wisconsin	1,061,501	716,806	37,591	10,309	81,266	33,125	146,516	2,179	33,709
Wyoming	91,019	61,832	3,737	800	7,136	3,300	11,804	201	2,209
Outlying areas									
American Samoa	6,051	1,925	190	352	586	902	1,271	60	765
Guam	14,125	7,742	979	543	1,339	1,388	1,490	64	580
Northern Mariana Islands	2,512	1,179	124	257	289	348	226	10	79
Puerto Rico	800,269	389,565	59,693	13,127	80,344	33,605	169,369	9,100	45,466
U.S. Virgin Islands	19,385	13,447	944	464	1,312	931	1,731	53	503
Foreign countries	548,315	333,247	86,030	9,740	86,594	15,248	13,349	614	3,493

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

State or area	Number			Total monthly benefits (thousands of dollars)		
	Total	Men	Women	Total	Men	Women
All areas	37,291,572	16,195,967	21,095,605	42,893,168	21,573,964	21,319,204
Alabama	612,921	258,366	354,555	684,998	340,176	344,822
Alaska	50,091	24,958	25,133	55,752	31,660	24,092
Arizona	753,962	341,605	412,357	891,085	465,349	425,736
Arkansas	391,663	169,335	222,328	426,137	214,428	211,710
California	3,574,845	1,596,901	1,977,944	4,082,272	2,077,326	2,004,945
Colorado	492,754	221,294	271,460	563,086	295,303	267,783
Connecticut	465,277	197,651	267,626	592,739	291,732	301,006
Delaware	119,825	52,255	67,570	147,821	74,614	73,207
District of Columbia	51,882	21,377	30,505	54,131	24,745	29,386
Florida	2,752,794	1,224,676	1,528,118	3,171,249	1,621,904	1,549,345
Georgia	944,473	400,917	543,556	1,077,912	536,135	541,776
Hawaii	171,849	75,377	96,472	196,934	96,052	100,882
Idaho	185,803	85,584	100,219	209,996	112,941	97,055
Illinois	1,448,984	618,818	830,166	1,729,982	855,749	874,233
Indiana	802,524	340,619	461,905	975,347	484,796	490,551
Iowa	430,684	183,340	247,344	495,303	247,376	247,927
Kansas	347,590	148,741	198,849	412,530	205,426	207,104
Kentucky	534,495	230,344	304,151	580,379	293,922	286,457
Louisiana	496,502	213,994	282,508	526,468	271,696	254,772
Maine	199,182	88,021	111,161	214,379	110,217	104,162
Maryland	611,149	258,853	352,296	726,142	352,649	373,493
Massachusetts	805,433	341,066	464,367	945,070	464,596	480,474
Michigan	1,301,261	562,220	739,041	1,611,090	813,918	797,172
Minnesota	640,692	279,749	360,943	750,849	383,446	367,403
Mississippi	355,134	149,028	206,106	382,458	187,648	194,809
Missouri	776,703	334,020	442,683	888,291	445,962	442,329
Montana	136,033	62,787	73,246	149,788	79,802	69,986
Nebraska	227,997	97,476	130,521	259,835	129,807	130,028
Nevada	287,524	137,647	149,877	336,156	182,163	153,993
New Hampshire	173,358	76,806	96,552	210,082	108,501	101,581
New Jersey	1,082,802	453,150	629,652	1,384,462	666,805	717,656
New Mexico	240,601	108,800	131,801	258,392	134,825	123,568
New York	2,302,736	967,388	1,335,348	2,783,376	1,332,838	1,450,538
North Carolina	1,153,108	487,875	665,233	1,327,792	652,545	675,247
North Dakota	90,721	39,278	51,443	96,459	49,012	47,448
Ohio	1,476,647	632,715	843,932	1,701,324	860,758	840,566
Oklahoma	469,458	203,161	266,297	523,941	262,421	261,520
Oregon	504,835	225,507	279,328	589,598	303,856	285,742
Pennsylvania	1,824,842	763,713	1,061,129	2,168,977	1,060,982	1,107,995
Rhode Island	142,244	58,971	83,273	166,881	80,146	86,736
South Carolina	596,860	257,063	339,797	688,701	347,276	341,426
South Dakota	114,473	50,727	63,746	122,358	63,436	58,922
Tennessee	803,412	343,831	459,581	914,201	457,246	456,955
Texas	2,322,291	1,028,050	1,294,241	2,589,503	1,342,908	1,246,595
Utah	227,439	102,562	124,877	265,466	141,944	123,522
Vermont	88,223	39,231	48,992	102,114	52,428	49,686
Virginia	884,918	378,302	506,616	1,023,922	509,299	514,622
Washington	768,056	344,194	423,862	924,287	479,553	444,734
West Virginia	272,819	118,148	154,671	304,227	154,976	149,251
Wisconsin	749,965	325,581	424,384	890,668	450,899	439,769
Wyoming	65,043	30,141	34,902	75,401	40,736	34,665

(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 2010—Continued

State or area	Number			Total monthly benefits (thousands of dollars)		
	Total	Men	Women	Total	Men	Women
Outlying areas						
American Samoa	2,223	1,071	1,152	1,656	905	751
Guam	8,533	4,195	4,338	6,479	3,621	2,859
Northern Mariana Islands	1,172	629	543	761	477	284
Puerto Rico	473,156	211,476	261,680	349,910	179,593	170,317
U.S. Virgin Islands	13,747	6,476	7,271	13,709	7,229	6,480
Foreign countries	467,864	219,907	247,957	270,343	137,211	133,132

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010
(in thousands of dollars)**

State or area	Total	Retirement			Survivors		Disability		
		Retired workers	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
All areas	58,048,295	40,662,492	1,343,640	334,405	4,884,520	1,437,963	8,759,959	45,925	579,391
Alabama	1,035,825	641,814	22,144	6,221	91,692	30,561	226,417	1,202	15,774
Alaska	79,906	55,198	1,464	800	5,406	3,340	12,807	57	833
Arizona	1,185,924	869,977	26,169	6,000	87,285	25,651	160,072	763	10,009
Arkansas	632,021	401,438	11,848	3,391	51,743	17,222	136,142	676	9,560
California	5,356,831	3,848,546	143,123	36,985	428,157	128,417	722,734	3,687	45,183
Colorado	749,162	540,599	18,811	3,960	60,071	17,887	101,314	395	6,124
Connecticut	742,891	563,107	13,697	4,279	53,501	16,487	85,517	274	6,029
Delaware	199,834	145,060	3,649	885	14,486	4,587	29,241	81	1,844
District of Columbia	72,460	50,851	1,029	444	4,985	2,382	12,201	12	556
Florida	4,118,532	3,058,887	88,708	21,510	310,931	79,453	524,995	2,404	31,645
Georgia	1,550,475	1,056,780	28,738	9,585	123,501	47,719	265,452	1,130	17,571
Hawaii	248,933	194,235	4,284	1,993	16,799	4,990	24,933	120	1,578
Idaho	284,098	202,864	7,117	1,569	22,705	6,669	40,321	225	2,629
Illinois	2,269,001	1,619,105	51,241	13,589	204,337	59,703	299,760	1,419	19,848
Indiana	1,337,202	934,269	28,945	7,096	116,351	35,399	200,524	1,007	13,610
Iowa	633,784	465,290	15,080	3,058	58,702	14,079	72,898	262	4,415
Kansas	539,542	388,437	11,590	2,692	46,890	13,279	71,720	253	4,679
Kentucky	893,647	532,689	21,505	4,498	85,699	24,835	208,364	1,681	14,376
Louisiana	772,879	454,993	26,524	5,123	94,562	29,638	149,594	1,394	11,051
Maine	299,168	202,455	6,378	1,457	23,761	6,140	54,858	241	3,878
Maryland	953,323	692,881	18,665	4,983	74,897	26,371	127,286	346	7,895
Massachusetts	1,244,433	878,976	24,053	6,571	93,624	27,805	197,619	557	15,229
Michigan	2,260,292	1,561,578	54,224	13,923	194,303	56,653	354,018	1,961	23,630
Minnesota	977,740	723,105	21,256	4,686	77,415	20,716	122,464	332	7,765
Mississippi	584,009	361,043	10,498	4,090	49,660	20,643	127,810	707	9,558
Missouri	1,233,418	841,736	25,056	6,261	103,535	31,677	210,590	880	13,683
Montana	199,474	143,491	4,854	1,086	17,248	4,609	26,580	142	1,464
Nebraska	330,570	241,198	7,661	1,612	29,788	7,395	40,263	125	2,528
Nevada	450,839	332,916	8,107	2,359	30,391	10,119	63,037	232	3,677
New Hampshire	285,653	204,859	4,875	1,264	18,826	5,759	46,101	133	3,836
New Jersey	1,773,403	1,322,502	32,391	10,225	133,159	39,917	218,001	973	16,237
New Mexico	360,511	245,756	9,510	2,089	29,497	9,630	60,092	346	3,591
New York	3,704,726	2,652,909	76,285	24,574	281,865	83,147	543,799	2,841	39,305
North Carolina	1,881,592	1,314,890	29,442	9,423	130,547	45,949	329,340	1,257	20,746
North Dakota	121,750	86,069	3,897	596	13,993	2,896	13,478	52	769
Ohio	2,282,955	1,560,764	66,190	11,738	239,898	58,317	324,535	1,846	19,668
Oklahoma	728,656	489,061	16,206	3,830	66,174	20,570	124,537	690	7,588
Oregon	784,439	574,612	17,616	4,439	62,244	14,937	104,605	530	5,455
Pennsylvania	2,866,806	2,030,460	66,075	14,006	264,904	63,561	399,089	2,046	26,665
Rhode Island	221,751	159,868	3,126	1,171	15,052	4,527	35,519	94	2,395
South Carolina	991,098	680,694	16,460	5,362	72,459	25,771	178,137	738	11,477
South Dakota	155,859	114,406	3,921	689	14,564	3,586	17,629	51	1,013
Tennessee	1,311,420	877,122	27,283	7,179	108,933	35,102	239,219	1,273	15,309
Texas	3,556,653	2,381,531	105,631	20,855	344,734	105,602	556,089	3,757	38,453
Utah	350,818	251,583	10,755	2,320	26,871	11,464	44,294	219	3,313
Vermont	137,480	98,530	2,736	812	10,323	2,791	20,742	66	1,481
Virginia	1,392,064	978,605	29,555	7,591	110,831	34,544	215,103	1,161	14,675
Washington	1,229,800	890,170	29,948	6,857	94,566	25,286	172,292	732	9,949
West Virginia	460,157	268,708	14,474	2,431	51,419	12,151	103,216	1,387	6,372
Wisconsin	1,182,238	865,480	23,285	6,198	95,008	26,062	155,465	558	10,181
Wyoming	99,423	72,714	2,296	477	8,164	2,498	12,515	55	705

(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 2010
(in thousands of dollars)—Continued**

State or area	Total	Retirement			Survivors		Disability		
		Retired workers	Spouses	Children	Widow(er)s and parents	Children	Disabled workers	Spouses	Children
Outlying areas									
American Samoa	3,656	1,481	61	125	377	406	1,056	12	138
Guam	9,918	6,098	353	205	991	763	1,360	12	136
Northern Mariana Islands	1,346	768	36	72	146	152	159	1	12
Puerto Rico	578,862	306,090	22,053	5,012	54,863	17,457	159,141	2,311	11,937
U.S. Virgin Islands	18,293	13,827	452	235	1,157	592	1,853	17	160
Foreign countries	320,754	209,415	22,312	3,925	60,530	10,099	13,066	204	1,203

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J5—Number, by state or other area and age, December 2010

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	54,031,968	3,208,834	5,104,434	3,024,538	5,402,590	11,008,931	8,865,871	6,841,922	5,335,310	3,409,125	1,779,306	51,107
Alabama	1,012,056	78,926	130,826	81,251	108,132	190,601	151,974	115,436	82,903	47,684	23,597	726
Alaska	78,208	7,296	8,045	4,402	8,374	18,782	12,916	8,454	5,520	2,985	1,396	38
Arizona	1,067,717	60,607	85,617	52,406	115,125	232,850	186,531	138,465	102,831	62,203	30,351	731
Arkansas	635,041	49,597	80,968	47,776	65,037	120,902	96,432	73,552	52,436	31,383	16,426	532
California	4,979,141	275,027	402,029	250,708	476,532	1,048,097	851,731	647,704	505,490	340,078	176,877	4,868
Colorado	693,341	37,389	57,240	34,242	71,716	153,913	118,438	88,110	66,614	42,781	22,317	581
Connecticut	622,167	30,465	50,911	26,462	49,052	126,461	100,744	83,153	72,637	51,337	29,986	959
Delaware	172,441	9,593	15,638	9,270	18,115	37,085	29,199	22,343	16,296	9,813	4,945	144
District of Columbia	74,417	4,683	8,372	4,401	5,079	14,020	12,389	9,344	7,462	5,269	3,236	162
Florida	3,784,225	187,982	284,154	182,977	376,318	786,381	656,329	515,405	408,766	254,319	128,102	3,492
Georgia	1,468,209	105,209	149,880	95,760	172,887	314,501	236,053	169,330	117,634	69,897	35,994	1,064
Hawaii	227,914	11,580	14,067	8,714	21,704	49,311	37,613	30,505	26,442	18,058	9,662	258
Idaho	269,293	15,968	24,174	13,796	29,552	58,690	45,876	33,113	23,961	15,633	8,333	197
Illinois	2,033,345	114,354	179,975	102,232	187,800	409,581	337,841	264,255	215,594	142,545	76,891	2,277
Indiana	1,191,768	73,357	121,052	69,105	125,730	237,816	190,361	145,705	116,090	73,515	37,989	1,048
Iowa	584,113	25,675	47,118	26,055	54,581	113,644	98,036	80,369	66,660	44,860	26,265	850
Kansas	488,765	27,789	44,767	24,610	44,009	95,115	79,021	64,978	52,747	35,293	19,786	650
Kentucky	894,473	67,375	123,201	73,047	96,355	166,073	132,069	98,304	72,451	43,874	21,130	594
Louisiana	790,617	65,528	96,295	55,093	77,199	150,054	121,645	92,823	70,393	41,276	19,754	557
Maine	299,875	17,374	36,353	17,958	29,008	58,494	46,397	37,121	28,841	18,422	9,593	314
Maryland	850,361	49,531	73,070	41,039	75,572	180,723	145,597	110,316	86,531	56,958	30,208	816
Massachusetts	1,140,830	65,755	126,988	58,949	83,705	215,708	177,463	147,531	126,725	87,709	48,818	1,479
Michigan	1,964,862	118,833	200,098	119,557	225,113	389,389	299,055	233,540	191,479	122,704	63,406	1,688
Minnesota	882,408	41,400	76,453	39,372	84,491	182,280	148,474	115,540	93,351	62,823	37,083	1,141
Mississippi	596,637	52,676	77,831	48,555	62,441	109,861	88,593	66,035	48,552	27,382	14,228	483
Missouri	1,166,223	73,260	127,369	73,232	115,659	228,237	184,782	145,374	110,250	70,275	36,660	1,125
Montana	192,701	9,997	15,793	9,803	21,075	41,877	33,046	24,008	18,660	11,572	6,682	188
Nebraska	308,790	15,156	25,582	14,039	26,016	60,605	51,747	43,415	35,134	23,407	13,229	460
Nevada	408,113	23,329	30,943	20,448	45,869	96,675	75,868	51,894	34,884	19,563	8,473	167
New Hampshire	254,752	16,060	28,432	12,909	23,993	52,387	40,259	31,315	24,682	15,826	8,651	238
New Jersey	1,472,335	77,126	116,419	67,112	128,876	301,950	245,330	198,731	166,406	109,876	58,843	1,666
New Mexico	360,242	24,554	35,622	21,161	38,304	74,914	60,137	44,632	31,954	19,294	9,432	238
New York	3,280,575	184,550	310,578	176,649	306,062	645,723	530,812	422,264	346,459	228,116	125,193	4,169
North Carolina	1,757,135	107,002	179,812	116,439	200,774	366,128	280,050	211,480	154,704	93,056	46,319	1,371
North Dakota	120,098	5,074	8,918	4,925	10,460	23,550	19,869	17,205	14,408	9,551	5,931	207
Ohio	2,124,650	113,718	205,224	115,938	213,123	412,542	345,096	273,449	224,927	145,319	73,478	1,836
Oklahoma	705,364	47,094	73,850	44,707	70,255	141,714	115,209	89,173	64,551	39,063	19,221	527
Oregon	712,216	31,708	56,057	37,782	81,834	156,474	118,860	87,206	68,651	47,188	25,828	628
Pennsylvania	2,577,714	134,832	239,585	133,573	244,882	493,719	408,704	338,578	291,118	191,060	99,200	2,463
Rhode Island	203,660	11,066	21,296	11,810	17,244	38,265	30,092	25,052	23,023	16,494	9,052	266
South Carolina	924,726	59,268	94,743	64,754	109,101	197,095	148,309	108,065	74,673	45,517	22,545	656
South Dakota	153,508	7,114	11,412	6,429	14,080	31,343	26,259	21,123	17,218	11,454	6,831	245
Tennessee	1,251,947	84,211	139,254	85,870	139,200	256,320	199,462	147,560	104,929	63,221	31,030	890
Texas	3,440,442	245,835	336,256	194,303	341,757	724,045	572,339	431,190	311,859	188,504	91,692	2,662
Utah	324,136	23,821	28,945	14,294	29,637	68,851	55,765	42,545	31,534	19,196	9,371	177
Vermont	128,619	7,135	13,895	6,805	12,561	27,096	20,538	15,736	12,345	8,022	4,363	123
Virginia	1,284,823	75,916	122,572	73,415	128,002	271,957	217,298	160,903	120,223	75,148	38,254	1,135
Washington	1,089,887	53,453	96,473	57,788	114,117	240,737	181,822	132,695	102,716	69,979	39,084	1,023
West Virginia	443,911	28,751	54,395	37,358	50,588	82,168	67,000	50,338	39,220	23,045	10,762	286
Wisconsin	1,061,501	53,342	97,013	51,979	109,202	212,611	171,752	137,226	112,808	73,158	41,224	1,186
Wyoming	91,019	4,889	7,227	4,351	9,509	20,290	16,073	11,744	8,854	5,274	2,736	72

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J5—Number, by state or other area and age, December 2010—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	6,051	1,882	727	619	600	920	669	330	202	73	29	0
Guam	14,125	2,260	1,254	583	1,495	2,780	2,562	1,672	958	429	129	3
Northern Mariana Islands												
Puerto Rico	800,269	67,727	96,547	69,242	93,597	151,175	119,710	88,859	58,422	35,307	18,894	789
U.S. Virgin Islands												
Foreign countries	548,315	22,610	11,686	7,685	38,470	120,637	121,644	94,211	69,700	41,585	19,437	650

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J5.1—Number, by state or other area and sex, December 2010

State or area	Total	Adult beneficiaries		Children
		Men	Women	
All areas	54,031,968	22,045,376	27,674,038	4,312,554
Alabama	1,012,056	393,219	514,742	104,095
Alaska	78,208	34,814	34,563	8,831
Arizona	1,067,717	452,653	538,906	76,158
Arkansas	635,041	254,001	317,284	63,756
California	4,979,141	2,094,270	2,520,506	364,365
Colorado	693,341	294,229	351,482	47,630
Connecticut	622,167	250,836	328,207	43,124
Delaware	172,441	70,274	89,597	12,570
District of Columbia	74,417	29,438	38,619	6,360
Florida	3,784,225	1,595,694	1,946,110	242,421
Georgia	1,468,209	576,266	755,147	136,796
Hawaii	227,914	95,878	117,413	14,623
Idaho	269,293	115,804	132,888	20,601
Illinois	2,033,345	817,872	1,055,216	160,257
Indiana	1,191,768	474,288	616,609	100,871
Iowa	584,113	237,445	308,504	38,164
Kansas	488,765	196,323	255,057	37,385
Kentucky	894,473	363,907	440,619	89,947
Louisiana	790,617	316,039	384,952	89,626
Maine	299,875	126,180	149,545	24,150
Maryland	850,361	339,012	446,987	64,362
Massachusetts	1,140,830	457,448	591,620	91,762
Michigan	1,964,862	797,429	1,001,359	166,074
Minnesota	882,408	367,021	456,311	59,076
Mississippi	596,637	228,565	297,966	70,106
Missouri	1,166,223	471,208	595,950	99,065
Montana	192,701	84,263	95,094	13,344
Nebraska	308,790	124,475	163,123	21,192
Nevada	408,113	181,996	198,242	27,875
New Hampshire	254,752	104,748	129,354	20,650
New Jersey	1,472,335	581,838	785,394	105,103
New Mexico	360,242	152,383	176,814	31,045
New York	3,280,575	1,306,710	1,714,404	259,461
North Carolina	1,757,135	697,162	917,261	142,712
North Dakota	120,098	49,676	62,688	7,734
Ohio	2,124,650	866,079	1,095,194	163,377
Oklahoma	705,364	283,487	360,269	61,608
Oregon	712,216	304,105	364,574	43,537
Pennsylvania	2,577,714	1,028,004	1,360,386	189,324
Rhode Island	203,660	80,728	107,483	15,449
South Carolina	924,726	369,336	476,572	78,818
South Dakota	153,508	64,622	78,720	10,166
Tennessee	1,251,947	498,925	642,006	111,016
Texas	3,440,442	1,402,276	1,726,163	312,003
Utah	324,136	132,929	161,499	29,708
Vermont	128,619	54,052	64,622	9,945
Virginia	1,284,823	515,053	668,516	101,254
Washington	1,089,887	462,631	554,471	72,785
West Virginia	443,911	185,940	216,941	41,030
Wisconsin	1,061,501	437,200	547,158	77,143
Wyoming	91,019	39,705	45,005	6,309
Outlying areas				
American Samoa	6,051	1,935	2,097	2,019
Guam	14,125	5,685	5,929	2,511
Northern Mariana Islands	2,512	939	889	684
Puerto Rico	800,269	326,464	381,607	92,198
U.S. Virgin Islands	19,385	8,149	9,338	1,898
Foreign countries	548,315	243,768	276,066	28,481

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

NOTE: Beginning with this year's edition we have removed the race breakdown because the quality of the data has become too inconsistent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)	
		Total	Less than 600.00	600.00–699.90	700.00–799.90	800.00–899.90	900.00–999.90	1,000.00–1,099.90	1,100.00–1,199.90	1,200.00–1,299.90	1,300.00–1,399.90	1,400.00 or more	Average	Median
All areas	34,593,080	100.0	11.2	6.6	7.2	6.8	6.4	6.6	7.1	7.7	7.8	32.9	1,175.50	1,151.30
Alabama	560,885	100.0	10.3	6.9	8.0	7.7	7.5	7.6	7.8	7.9	7.4	28.8	1,144.30	1,149.40
Alaska	49,275	100.0	16.9	7.0	7.5	7.0	6.4	6.2	6.3	6.0	6.0	30.7	1,120.20	1,050.20
Arizona	724,817	100.0	9.3	6.1	6.9	6.7	6.2	6.5	7.2	8.0	8.3	34.6	1,200.30	1,249.90
Arkansas	361,848	100.0	10.7	7.4	8.4	8.3	8.3	8.4	8.2	8.0	7.3	24.9	1,109.40	1,050.60
California	3,301,043	100.0	14.9	6.7	6.9	6.4	5.9	5.9	6.2	6.5	6.8	33.7	1,165.90	1,150.30
Colorado	465,625	100.0	13.5	6.3	6.9	6.7	6.1	6.2	6.6	7.1	7.3	33.2	1,161.00	1,151.40
Connecticut	437,382	100.0	7.3	5.0	5.8	5.9	5.5	6.0	6.9	7.7	8.5	41.4	1,287.40	1,254.30
Delaware	115,978	100.0	6.7	5.4	6.4	6.3	5.8	6.3	7.3	8.4	9.2	38.3	1,250.80	1,255.10
District of Columbia	48,173	100.0	24.9	7.4	7.1	6.7	6.5	5.9	5.3	4.9	4.3	27.0	1,055.60	949.80
Florida	2,617,763	100.0	10.6	6.9	7.4	7.1	6.6	6.8	7.2	7.7	7.9	31.7	1,168.50	1,151.20
Georgia	913,305	100.0	10.7	6.6	7.7	7.7	7.3	7.2	7.3	7.5	7.3	30.6	1,157.10	1,149.40
Hawaii	166,828	100.0	12.7	6.4	6.7	6.3	6.5	7.0	7.4	7.9	7.2	32.0	1,164.30	1,150.70
Idaho	177,043	100.0	10.4	7.2	7.7	7.1	6.8	7.3	7.7	8.2	7.9	29.5	1,145.80	1,150.90
Illinois	1,336,527	100.0	10.6	6.0	6.7	6.1	5.6	5.9	6.7	7.6	8.1	36.8	1,211.40	1,249.80
Indiana	756,433	100.0	6.3	5.8	6.9	6.2	5.9	6.4	7.6	8.9	9.2	36.8	1,235.10	1,253.90
Iowa	396,969	100.0	8.0	7.0	7.5	6.8	6.7	7.3	8.3	9.3	8.8	30.4	1,172.10	1,151.80
Kansas	322,703	100.0	7.9	6.3	7.0	6.7	6.6	7.1	7.8	8.6	8.7	33.3	1,203.70	1,249.80
Kentucky	475,681	100.0	12.1	7.3	7.9	7.5	7.1	7.2	7.5	8.0	7.6	27.7	1,119.80	1,149.60
Louisiana	414,008	100.0	16.4	7.5	7.8	7.1	6.5	6.3	6.4	7.1	6.6	28.2	1,099.00	1,050.60
Maine	185,849	100.0	13.9	7.6	8.0	7.7	7.5	7.6	7.7	7.7	7.1	25.1	1,089.40	1,050.70
Maryland	573,774	100.0	12.2	5.7	6.3	6.1	6.0	6.2	6.7	7.2	7.5	36.1	1,207.60	1,249.20
Massachusetts	739,823	100.0	13.0	6.3	6.7	6.5	6.0	6.2	6.5	6.9	7.2	34.7	1,188.10	1,151.60
Michigan	1,231,331	100.0	5.9	5.5	6.6	5.8	5.2	5.7	7.1	8.3	9.1	40.7	1,268.20	1,254.70
Minnesota	604,090	100.0	8.7	6.6	7.4	6.8	6.2	6.4	7.0	8.0	8.4	34.4	1,197.00	1,249.90
Mississippi	328,311	100.0	11.7	7.7	8.6	8.5	8.2	8.1	7.9	7.5	6.9	24.8	1,099.70	1,050.60
Missouri	725,690	100.0	10.3	6.7	7.5	7.1	6.8	7.1	7.6	8.2	8.2	30.6	1,159.90	1,151.60
Montana	128,616	100.0	11.6	7.6	8.0	7.3	7.2	7.5	7.9	8.2	8.0	26.7	1,115.70	1,149.40
Nebraska	208,052	100.0	9.3	7.0	7.6	7.2	7.2	7.6	8.1	8.5	8.2	29.4	1,159.30	1,150.60
Nevada	283,229	100.0	11.6	6.3	7.1	6.8	6.5	6.5	6.7	7.2	7.5	33.8	1,175.40	1,151.30
New Hampshire	167,720	100.0	7.9	5.6	6.7	6.8	6.7	7.2	7.7	8.3	8.3	35.0	1,221.40	1,249.90
New Jersey	1,017,596	100.0	7.4	5.2	5.9	5.9	5.3	5.6	6.3	7.1	8.0	43.4	1,299.60	1,348.50
New Mexico	223,015	100.0	14.7	7.4	7.8	7.5	7.2	7.2	7.1	7.2	6.9	27.0	1,102.00	1,050.70
New York	2,148,469	100.0	9.3	6.0	6.5	6.1	5.8	6.2	6.9	7.7	8.0	37.4	1,234.80	1,250.30
North Carolina	1,125,816	100.0	8.0	6.2	7.6	8.0	8.0	8.2	8.3	8.3	7.9	29.4	1,167.90	1,148.90
North Dakota	78,486	100.0	11.7	8.4	8.7	7.9	7.5	7.7	7.6	8.1	7.7	24.8	1,096.60	1,050.60
Ohio	1,322,265	100.0	11.7	6.1	6.6	5.9	5.4	5.9	7.1	8.4	8.7	34.3	1,180.40	1,249.70
Oklahoma	430,842	100.0	11.3	7.0	7.6	7.3	7.3	7.6	7.9	8.4	7.7	27.8	1,135.10	1,149.20
Oregon	486,588	100.0	9.1	6.7	7.2	6.6	6.3	6.7	7.8	8.7	8.6	32.3	1,180.90	1,151.50
Pennsylvania	1,675,278	100.0	7.7	6.3	6.8	6.3	6.0	6.7	7.9	9.1	9.0	34.1	1,212.00	1,250.00
Rhode Island	135,197	100.0	10.1	6.4	7.0	6.8	6.8	7.3	7.8	8.1	7.9	31.9	1,182.50	1,151.00
South Carolina	581,505	100.0	8.5	6.3	7.6	7.9	7.8	7.8	8.0	8.0	7.7	30.4	1,170.60	1,150.10
South Dakota	104,473	100.0	11.9	7.8	8.5	8.2	8.0	7.8	7.9	8.1	7.2	24.6	1,095.10	1,050.90
Tennessee	756,708	100.0	9.2	6.8	7.9	7.8	7.6	7.7	7.9	8.0	7.6	29.6	1,159.10	1,149.20
Texas	2,077,693	100.0	14.2	6.9	7.4	6.9	6.5	6.4	6.5	7.0	6.9	31.4	1,146.20	1,149.40
Utah	211,918	100.0	11.4	6.9	7.5	6.4	5.7	5.7	6.1	7.4	7.8	35.1	1,187.20	1,250.60
Vermont	83,840	100.0	8.5	6.5	7.2	7.3	7.3	7.7	8.4	8.6	8.2	30.2	1,175.20	1,150.90
Virginia	829,110	100.0	10.8	6.3	7.1	7.1	6.9	7.0	7.2	7.6	7.4	32.5	1,180.30	1,151.10
Washington	727,956	100.0	8.8	6.1	6.8	6.3	5.8	6.0	6.8	7.8	8.4	37.2	1,222.80	1,250.40
West Virginia	231,811	100.0	9.4	6.6	7.2	6.7	6.8	7.3	8.2	9.3	8.8	29.7	1,159.20	1,152.10
Wisconsin	716,806	100.0	6.8	6.5	7.2	6.4	6.0	6.5	7.8	9.3	9.6	34.0	1,207.40	1,250.00
Wyoming	61,832	100.0	9.5	6.9	7.7	6.7	6.5	6.6	7.4	8.1	8.2	32.5	1,176.00	1,151.20

(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 2010—Continued

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)		
		Total	Less than 600.00	600.00–699.90	700.00–799.90	800.00–899.90	900.00–999.90	1,000.00–1,099.90	1,100.00–1,199.90	1,200.00–1,299.90	1,300.00–1,399.90	1,400.00 or more	Average	Median	
Outlying areas															
American Samoa	1,925	100.0	39.0	11.5	10.3	7.9	5.8	5.9	4.4	3.7	3.0	8.6	769.50	654.50	
Guam	7,742	100.0	39.7	11.8	9.5	7.4	6.2	4.6	4.0	3.3	2.6	10.9	787.60	648.80	
Northern Mariana Islands	1,179	100.0	56.9	8.8	7.2	5.0	3.6	3.9	2.5	1.8	1.7	8.5	651.70	358.60	
Puerto Rico	389,565	100.0	32.8	13.9	12.5	9.8	7.5	5.9	4.5	3.4	2.5	7.2	785.70	746.80	
U.S. Virgin Islands	13,447	100.0	15.4	9.7	9.8	9.6	9.1	7.9	7.0	6.0	5.7	19.9	1,028.30	949.10	
Foreign countries	333,247	100.0	54.3	9.0	7.4	5.8	4.5	3.7	3.1	2.6	2.2	7.4	628.40	315.40	

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)	
		Total	Less than 600.00	600.00–699.90	700.00–799.90	800.00–899.90	900.00–999.90	1,000.00–1,099.90	1,100.00–1,199.90	1,200.00–1,299.90	1,300.00–1,399.90	1,400.00 or more	Average	Median
All areas	8,203,951	100.0	13.0	8.3	10.9	10.2	9.1	8.0	6.9	5.9	4.9	22.9	1,067.80	949.50
Alabama	216,038	100.0	12.0	8.6	11.7	11.0	9.9	8.5	7.1	6.0	4.8	20.4	1,048.00	949.60
Alaska	12,119	100.0	14.5	9.0	11.8	10.0	8.4	7.5	6.5	5.2	4.2	22.9	1,056.80	948.70
Arizona	144,342	100.0	10.7	7.5	10.2	9.9	9.1	8.1	7.2	6.4	5.4	25.5	1,109.00	1,048.40
Arkansas	133,719	100.0	12.4	8.7	11.8	11.3	10.3	9.1	7.7	6.4	5.0	17.3	1,018.10	950.00
California	662,232	100.0	14.2	8.2	10.2	9.2	8.1	7.2	6.3	5.6	4.8	26.1	1,091.40	1,048.00
Colorado	94,404	100.0	12.3	8.4	10.7	10.0	9.1	8.2	7.0	6.0	5.1	23.1	1,073.20	949.00
Connecticut	77,298	100.0	12.1	7.9	10.3	9.4	8.5	7.8	6.7	6.0	5.1	26.2	1,106.30	1,048.30
Delaware	25,925	100.0	10.4	7.3	9.6	9.9	9.0	8.0	7.2	6.3	5.3	27.1	1,127.90	1,048.30
District of Columbia	12,843	100.0	17.1	10.4	13.1	12.0	9.6	8.3	6.9	5.0	3.8	13.7	950.00	847.30
Florida	488,461	100.0	11.6	8.2	11.0	10.4	9.4	8.3	7.1	6.1	5.1	22.7	1,074.80	949.40
Georgia	248,887	100.0	11.2	8.0	10.8	10.5	9.9	8.8	7.7	6.4	5.4	21.3	1,066.60	949.30
Hawaii	22,686	100.0	11.5	7.7	9.9	9.6	8.8	8.2	7.5	6.7	5.5	24.8	1,099.00	1,047.40
Idaho	38,716	100.0	14.0	8.9	11.4	10.4	8.9	7.5	6.7	6.0	4.9	21.2	1,041.50	949.50
Illinois	274,692	100.0	13.4	8.1	10.4	9.5	8.5	7.4	6.5	5.7	4.9	25.6	1,091.30	1,048.10
Indiana	186,817	100.0	12.8	8.1	10.9	10.0	9.0	8.1	6.9	6.0	5.1	23.2	1,073.40	950.00
Iowa	71,549	100.0	15.1	9.3	11.4	10.3	9.0	7.8	6.6	5.7	4.9	19.9	1,018.80	948.20
Kansas	69,044	100.0	13.4	8.8	11.5	10.5	9.3	8.0	7.2	6.0	5.2	20.2	1,038.80	949.90
Kentucky	199,732	100.0	14.4	8.9	11.3	10.1	9.0	7.8	6.6	5.6	4.7	21.6	1,043.20	949.50
Louisiana	142,796	100.0	15.0	8.8	11.3	10.2	8.7	7.4	6.2	5.2	4.5	22.6	1,047.60	949.20
Maine	55,525	100.0	14.4	9.7	12.4	11.7	10.1	8.7	6.8	5.7	4.5	16.0	988.00	946.40
Maryland	115,898	100.0	12.1	7.6	10.2	9.8	8.7	7.9	7.0	6.1	5.3	25.3	1,098.30	1,048.30
Massachusetts	187,321	100.0	12.8	8.8	11.4	10.5	9.4	8.1	7.0	5.8	4.7	21.6	1,055.00	948.80
Michigan	314,926	100.0	13.4	8.0	10.0	9.0	7.8	6.8	6.0	5.4	4.7	29.0	1,124.10	1,047.80
Minnesota	115,780	100.0	13.7	8.6	11.0	10.2	8.8	7.9	6.7	5.7	4.8	22.6	1,057.70	949.10
Mississippi	125,555	100.0	12.4	8.8	11.9	12.0	10.4	8.7	7.3	6.0	4.8	17.7	1,018.00	947.60
Missouri	202,465	100.0	13.4	8.9	11.5	10.7	9.4	8.2	6.9	5.7	4.8	20.5	1,040.10	949.20
Montana	26,077	100.0	14.8	9.3	11.6	10.6	9.1	8.0	6.7	5.6	4.6	19.7	1,019.30	948.30
Nebraska	39,846	100.0	14.2	9.1	12.1	10.8	9.4	8.2	7.1	6.1	5.1	17.9	1,010.50	947.40
Nevada	55,858	100.0	9.3	7.0	10.0	10.0	9.3	8.4	7.6	6.4	5.5	26.4	1,128.50	1,047.90
New Hampshire	42,504	100.0	10.2	7.7	10.6	10.8	9.9	8.6	7.7	6.4	5.5	22.6	1,084.60	1,047.60
New Jersey	185,970	100.0	10.9	6.9	9.3	8.7	8.0	7.4	6.5	5.8	5.1	31.4	1,172.20	1,048.90
New Mexico	58,641	100.0	14.4	9.0	11.7	10.5	9.3	8.1	6.9	6.0	4.7	19.6	1,024.70	949.40
New York	490,662	100.0	14.1	8.1	10.2	9.1	8.0	7.0	6.1	5.4	4.6	27.3	1,108.30	1,048.30
North Carolina	310,399	100.0	10.6	7.7	10.5	10.8	10.3	9.5	8.2	6.9	5.6	19.9	1,061.00	1,048.00
North Dakota	13,570	100.0	15.8	9.7	12.3	10.5	9.5	7.8	6.3	5.3	4.9	17.7	993.20	945.70
Ohio	313,105	100.0	15.9	9.2	11.3	9.8	8.4	7.2	6.2	5.3	4.5	22.1	1,036.50	947.90
Oklahoma	120,235	100.0	14.0	8.8	11.2	10.4	9.1	7.9	6.9	5.9	5.1	20.7	1,035.80	950.40
Oregon	97,786	100.0	13.1	8.7	10.7	10.0	8.7	7.8	6.7	5.7	4.9	23.7	1,069.70	948.80
Pennsylvania	372,365	100.0	13.4	8.1	10.6	9.8	8.8	7.7	6.8	5.9	5.0	23.8	1,071.80	949.30
Rhode Island	34,381	100.0	13.5	9.2	11.5	10.8	9.5	8.1	6.8	5.7	4.6	20.3	1,033.10	949.90
South Carolina	164,930	100.0	10.0	7.3	10.3	10.5	10.1	9.2	8.2	6.9	5.7	21.7	1,080.10	1,048.00
South Dakota	17,722	100.0	15.6	9.4	12.0	10.6	9.4	8.3	7.1	5.6	4.7	17.2	994.70	948.60
Tennessee	230,168	100.0	12.0	8.5	11.5	11.1	10.1	8.7	7.5	6.2	5.1	19.3	1,039.30	949.40
Texas	528,238	100.0	13.5	8.3	11.2	10.3	9.2	8.2	7.0	6.0	5.0	21.5	1,052.70	949.60
Utah	41,919	100.0	14.3	8.9	11.0	10.0	8.8	7.3	6.5	5.6	4.6	22.8	1,056.60	948.40
Vermont	20,774	100.0	14.2	9.4	12.0	10.7	10.2	8.9	7.4	5.8	4.5	16.8	998.50	946.80
Virginia	199,923	100.0	11.9	7.7	10.5	10.2	9.4	8.6	7.5	6.3	5.3	22.7	1,075.90	1,047.50
Washington	159,689	100.0	12.9	8.5	10.9	10.0	8.8	7.6	6.6	5.6	4.7	24.3	1,078.90	949.20
West Virginia	93,663	100.0	13.8	8.1	10.1	9.2	8.1	7.0	6.2	5.6	4.8	27.2	1,102.00	1,048.00
Wisconsin	146,516	100.0	14.0	8.4	10.7	9.9	8.8	7.7	6.7	5.8	4.9	23.1	1,061.10	950.60
Wyoming	11,804	100.0	14.3	9.3	11.2	10.4	8.5	6.9	6.3	5.3	4.4	23.4	1,060.20	949.00

(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 2010—Continued

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)	
		Total	Less than 600.00	600.00–699.90	700.00–799.90	800.00–899.90	900.00–999.90	1,000.00–1,099.90	1,100.00–1,199.90	1,200.00–1,299.90	1,300.00–1,399.90	1,400.00 or more	Average	Median
Outlying areas														
American Samoa	1,271	100.0	22.7	14.2	15.7	11.6	8.2	7.8	7.1	4.2	2.9	5.8	830.50	747.50
Guam	1,490	100.0	20.5	9.5	14.1	10.9	8.7	7.2	6.3	5.7	3.8	13.2	912.80	850.60
Northern Mariana Islands	226	100.0	37.2	14.2	18.1	11.1	6.6	3.5	1.8	3.1	0.0	4.4	701.80	658.30
Puerto Rico	169,369	100.0	12.2	11.0	15.9	14.7	11.7	8.8	6.4	4.6	3.5	11.2	939.60	848.50
U.S. Virgin Islands	1,731	100.0	11.2	8.2	10.0	9.9	10.0	9.0	8.8	6.0	6.0	21.0	1,070.60	1,043.30
Foreign countries	13,349	100.0	21.0	7.7	9.8	9.5	8.4	7.3	6.5	5.5	4.9	19.5	978.80	948.90

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)	
		Total	Less than 600.00	600.00–699.90	700.00–799.90	800.00–899.90	900.00–999.90	1,000.00–1,099.90	1,100.00–1,199.90	1,200.00–1,299.90	1,300.00–1,399.90	1,400.00 or more	Average	Median
All areas	4,040,960	100.0	10.4	4.6	5.6	6.8	8.0	9.7	11.4	10.3	9.2	24.1	1,133.90	1,149.50
Alabama	77,565	100.0	12.2	5.6	7.1	8.3	9.4	10.0	10.8	9.4	8.1	19.2	1,072.20	1,051.90
Alaska	4,471	100.0	13.7	5.6	5.9	7.2	8.6	8.9	10.7	9.4	8.2	21.9	1,087.30	1,139.00
Arizona	70,098	100.0	8.4	3.6	4.7	6.0	7.6	9.5	12.1	11.4	10.2	26.6	1,174.20	1,153.90
Arkansas	44,998	100.0	12.2	6.4	7.9	9.0	9.6	10.4	10.8	9.3	7.7	16.8	1,048.80	1,050.10
California	351,002	100.0	11.8	4.8	5.4	6.4	7.3	8.8	10.3	9.7	8.7	26.8	1,149.50	1,149.50
Colorado	49,351	100.0	9.8	4.1	5.2	6.5	8.0	9.5	10.9	10.6	9.5	26.0	1,153.50	1,154.00
Connecticut	40,315	100.0	5.6	2.6	3.6	4.6	6.4	8.8	11.3	10.9	10.8	35.4	1,271.30	1,250.80
Delaware	11,111	100.0	4.4	2.5	4.3	5.7	7.1	9.7	12.4	12.0	12.2	29.7	1,232.50	1,248.30
District of Columbia	4,939	100.0	25.4	8.4	9.0	8.2	7.9	7.3	6.3	5.1	4.8	17.6	962.00	850.20
Florida	253,405	100.0	8.3	4.2	5.5	7.0	8.4	10.0	11.8	10.6	9.4	25.0	1,160.50	1,149.40
Georgia	103,439	100.0	11.6	5.6	6.8	8.1	8.8	9.6	10.2	9.3	8.5	21.7	1,095.70	1,052.60
Hawaii	14,329	100.0	12.1	4.9	6.3	7.7	9.0	9.3	11.1	9.5	8.0	22.2	1,105.60	1,148.50
Idaho	18,273	100.0	5.6	3.5	5.2	7.3	9.2	11.3	13.1	11.6	10.2	23.1	1,163.50	1,149.60
Illinois	160,226	100.0	7.4	3.3	4.3	5.4	6.9	9.3	12.1	11.2	10.3	29.6	1,206.30	1,248.50
Indiana	89,617	100.0	4.4	2.5	3.9	5.6	7.7	10.4	13.6	12.6	11.6	27.7	1,215.90	1,247.90
Iowa	48,155	100.0	4.8	3.6	5.4	7.2	9.0	11.5	13.2	11.8	9.9	23.6	1,171.50	1,152.50
Kansas	36,844	100.0	5.4	3.2	4.7	6.6	8.2	10.3	12.2	11.4	10.2	27.9	1,205.50	1,153.20
Kentucky	73,762	100.0	13.9	6.2	7.1	7.9	8.7	9.9	11.1	9.3	8.2	17.7	1,048.90	1,051.80
Louisiana	83,099	100.0	14.9	6.4	7.5	8.1	8.5	9.3	10.1	9.2	7.8	18.4	1,044.70	1,050.20
Maine	20,469	100.0	9.8	5.0	6.9	8.5	9.8	11.0	11.3	10.0	8.2	19.4	1,092.20	1,052.70
Maryland	60,963	100.0	9.8	4.1	5.2	6.3	7.3	9.3	11.1	10.2	9.3	27.2	1,168.30	1,155.00
Massachusetts	75,475	100.0	10.1	3.9	4.9	6.0	7.2	9.0	10.6	10.3	9.2	28.8	1,180.50	1,154.20
Michigan	148,214	100.0	4.5	2.2	3.5	5.1	7.1	10.3	13.8	12.5	11.5	29.5	1,231.00	1,247.70
Minnesota	63,658	100.0	7.0	4.0	5.3	6.7	7.9	10.0	11.9	11.4	10.3	25.5	1,170.50	1,153.40
Mississippi	43,739	100.0	16.2	7.0	8.1	8.6	9.0	9.5	9.6	8.2	7.2	16.6	1,016.90	1,049.20
Missouri	84,323	100.0	7.8	4.1	5.7	7.4	8.6	10.4	12.2	10.7	9.9	23.2	1,145.20	1,149.30
Montana	14,384	100.0	6.8	4.3	5.9	7.7	9.8	11.5	12.7	10.9	9.3	21.1	1,134.30	1,147.50
Nebraska	24,592	100.0	5.6	4.2	5.9	7.7	9.2	11.2	12.1	10.7	9.3	24.0	1,161.70	1,148.20
Nevada	24,132	100.0	8.4	3.9	5.1	6.1	7.4	9.6	11.5	10.8	9.8	27.5	1,175.30	1,153.90
New Hampshire	14,585	100.0	5.3	2.8	4.3	5.8	7.8	9.9	13.2	11.8	9.9	29.1	1,217.50	1,247.80
New Jersey	101,207	100.0	6.1	2.9	4.0	5.3	6.7	9.0	11.1	10.7	10.3	33.8	1,247.30	1,248.00
New Mexico	26,242	100.0	14.6	6.1	7.0	8.2	8.8	9.7	10.2	9.3	7.4	18.6	1,051.80	1,051.30
New York	223,690	100.0	7.7	3.8	5.0	6.4	7.7	9.9	11.8	10.7	9.6	27.5	1,188.90	1,153.80
North Carolina	109,727	100.0	10.9	5.3	6.6	8.2	9.1	10.2	10.8	9.4	8.5	21.0	1,096.50	1,051.40
North Dakota	12,522	100.0	8.4	6.5	7.6	9.4	10.4	10.6	11.0	9.1	8.0	18.9	1,086.80	1,050.50
Ohio	195,207	100.0	8.4	3.4	4.4	5.8	7.3	10.0	13.2	12.0	10.6	24.9	1,165.20	1,155.10
Oklahoma	55,169	100.0	9.5	4.8	6.5	7.7	9.4	10.5	11.5	10.6	9.2	20.4	1,108.90	1,149.00
Oregon	49,293	100.0	5.6	2.9	4.4	5.9	8.2	10.7	13.5	12.3	10.7	25.8	1,192.60	1,153.50
Pennsylvania	211,387	100.0	5.4	2.8	4.4	6.1	8.0	11.1	13.9	12.5	10.9	24.8	1,190.20	1,155.40
Rhode Island	12,054	100.0	6.9	3.9	4.6	6.4	8.9	11.4	12.3	10.5	9.1	26.1	1,180.30	1,148.10
South Carolina	60,844	100.0	11.6	5.4	6.9	8.1	9.0	10.0	10.5	9.3	8.2	20.9	1,089.30	1,051.60
South Dakota	13,036	100.0	9.1	6.6	7.9	8.9	10.4	11.0	11.0	9.7	8.1	17.2	1,073.90	1,052.10
Tennessee	91,105	100.0	10.7	5.2	6.9	7.9	9.2	10.1	11.2	9.8	8.4	20.6	1,096.30	1,146.30
Texas	291,591	100.0	12.7	5.7	6.6	7.5	8.1	9.0	10.2	9.4	8.3	22.5	1,099.20	1,148.80
Utah	20,587	100.0	8.1	3.2	3.9	5.0	6.3	8.5	11.8	11.7	11.2	30.2	1,208.30	1,248.70
Vermont	8,537	100.0	7.0	4.3	6.4	7.4	9.4	11.0	11.5	11.3	9.1	22.5	1,146.20	1,146.60
Virginia	92,637	100.0	10.6	5.1	6.2	7.7	8.8	9.9	10.7	9.6	8.4	23.0	1,117.40	1,148.70
Washington	73,597	100.0	6.2	3.1	4.1	5.5	7.1	9.4	12.5	12.1	11.0	29.1	1,213.90	1,248.10
West Virginia	42,654	100.0	8.6	4.7	6.8	7.9	8.8	11.3	13.1	11.2	9.3	18.3	1,098.30	1,148.10
Wisconsin	75,650	100.0	4.7	2.9	4.3	6.0	8.0	10.7	13.6	12.5	11.7	25.8	1,198.70	1,154.40
Wyoming	6,565	100.0	5.5	3.7	5.3	6.9	8.4	10.4	13.1	12.3	9.5	24.9	1,176.00	1,154.30

(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 2010—Continued

State or area	Number	Percentage distribution by dollar amount of benefit											Monthly benefit (dollars)		
		Total	Less than 600.00	600.00–699.90	700.00–799.90	800.00–899.90	900.00–999.90	1,000.00–1,099.90	1,100.00–1,199.90	1,200.00–1,299.90	1,300.00–1,399.90	1,400.00 or more	Average	Median	
Outlying areas															
American Samoa	404	100.0	46.0	16.1	9.2	8.9	4.7	5.9	2.5	2.2	1.2	3.2	671.10	651.40	
Guam	1,094	100.0	35.4	13.6	13.2	10.1	6.4	5.5	4.0	3.6	1.6	6.6	772.30	749.90	
Northern Mariana Islands	202	100.0	70.3	a	a	a	a	a	a	a	a	a	538.00	410.60	
Puerto Rico	71,880	100.0	45.1	12.9	10.8	8.2	6.4	4.9	3.7	2.5	1.7	3.8	693.30	647.80	
U.S. Virgin Islands	1,201	100.0	20.7	13.3	10.7	11.9	10.4	8.0	6.4	4.2	4.4	9.9	892.90	854.50	
Foreign countries	83,345	100.0	43.7	a	a	a	a	a	a	a	a	a	699.00	649.40	

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

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

a. Suppressed to avoid disclosing information about particular individuals.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J10—Number of children, by state or other area and type of benefit, December 2010

State or area	Total	Children under age 18 of—				Disabled adult children of—				Students aged 18–19 of—			
		Subtotal	Retired workers	Deceased workers	Disabled workers	Subtotal	Retired workers	Deceased workers	Disabled workers	Subtotal	Retired workers	Deceased workers	Disabled workers
All areas	4,312,554	3,208,791	309,512	1,239,083	1,660,196	949,200	250,262	601,420	97,518	154,563	20,085	72,286	62,192
Alabama	104,095	78,925	5,955	27,655	45,315	20,581	4,147	13,564	2,870	4,589	429	1,946	2,214
Alaska	8,831	7,296	1,136	3,632	2,528	1,200	361	728	111	335	58	197	80
Arizona	76,158	60,607	6,332	25,588	28,687	12,532	3,703	7,428	1,401	3,019	419	1,522	1,078
Arkansas	63,756	49,597	3,350	16,639	29,608	11,783	2,530	7,357	1,896	2,376	242	989	1,145
California	364,365	275,017	38,817	114,156	122,044	79,831	25,572	47,369	6,890	9,517	1,807	4,675	3,035
Colorado	47,630	37,388	3,780	16,701	16,907	8,257	2,541	4,968	748	1,985	272	1,025	688
Connecticut	43,124	30,465	3,319	11,320	15,826	11,599	3,283	7,488	828	1,060	140	518	402
Delaware	12,570	9,592	714	3,888	4,990	2,440	618	1,582	240	538	64	278	196
District of Columbia	6,360	4,683	573	2,484	1,626	1,509	227	1,148	134	168	26	99	43
Florida	242,421	187,981	24,016	75,467	88,498	44,237	12,458	27,112	4,667	10,203	1,628	4,854	3,721
Georgia	136,796	105,209	9,775	45,661	49,773	25,271	5,713	16,915	2,643	6,316	801	3,127	2,388
Hawaii	14,623	11,580	2,457	4,564	4,559	2,872	961	1,724	187	171	47	81	43
Idaho	20,601	15,968	1,403	6,220	8,345	3,856	1,234	2,152	470	777	104	344	329
Illinois	160,257	114,354	11,777	47,319	55,258	39,850	10,514	25,978	3,358	6,053	913	2,934	2,206
Indiana	100,871	73,357	5,262	28,892	39,203	22,417	5,520	14,459	2,438	5,097	547	2,363	2,187
Iowa	38,164	25,675	1,947	10,500	13,228	11,047	3,156	6,944	947	1,442	143	702	597
Kansas	37,385	27,789	2,068	11,569	14,152	8,210	2,264	5,158	788	1,386	157	709	520
Kentucky	89,947	67,374	3,679	21,560	42,135	19,428	4,103	12,471	2,854	3,145	216	1,265	1,664
Louisiana	89,626	65,526	4,732	27,688	33,106	20,700	4,429	13,960	2,311	3,400	312	1,707	1,381
Maine	24,150	17,374	1,144	4,416	11,814	6,016	1,444	3,608	964	760	74	263	423
Maryland	64,362	49,530	4,654	23,664	21,212	13,321	3,239	9,064	1,018	1,511	217	854	440
Massachusetts	91,762	65,754	4,830	18,510	42,414	23,074	6,005	14,239	2,830	2,934	356	1,105	1,473
Michigan	166,074	118,830	10,188	41,721	66,921	41,703	10,871	26,527	4,305	5,541	674	2,395	2,472
Minnesota	59,076	41,399	2,826	15,476	23,097	15,396	4,777	9,264	1,355	2,281	230	1,091	960
Mississippi	70,106	52,675	4,299	19,982	28,394	14,258	2,894	9,395	1,969	3,173	317	1,462	1,394
Missouri	99,065	73,258	4,984	28,075	40,199	21,527	5,272	13,770	2,485	4,280	460	1,889	1,931
Montana	13,344	9,997	1,095	4,388	4,514	2,839	853	1,737	249	508	74	257	177
Nebraska	21,192	15,156	1,143	6,254	7,759	5,291	1,560	3,209	522	745	79	375	291
Nevada	27,875	23,328	2,970	10,173	10,185	3,643	1,002	2,267	374	904	147	467	290
New Hampshire	20,650	16,059	912	4,257	10,890	3,926	1,041	2,260	625	665	67	234	364
New Jersey	105,103	77,124	8,543	29,447	39,134	24,607	6,976	15,779	1,852	3,372	538	1,529	1,305
New Mexico	31,045	24,554	2,287	10,734	11,533	5,426	1,519	3,339	568	1,065	146	571	348
New York	259,461	184,549	21,076	57,111	106,362	68,961	19,032	43,871	6,058	5,951	968	2,506	2,477
North Carolina	142,712	107,002	8,387	40,858	57,757	30,178	6,814	19,483	3,881	5,532	606	2,566	2,360
North Dakota	7,734	5,073	361	2,312	2,400	2,379	689	1,540	150	282	33	146	103
Ohio	163,377	113,716	8,625	45,701	59,390	42,394	10,409	28,358	3,627	7,267	791	3,547	2,929
Oklahoma	61,608	47,094	3,750	19,935	23,409	11,731	2,765	7,632	1,334	2,783	308	1,352	1,123
Oregon	43,537	31,708	4,107	12,324	15,277	10,328	3,185	6,126	1,017	1,501	256	703	542
Pennsylvania	189,324	134,830	10,019	47,735	77,076	47,330	11,903	30,636	4,791	7,164	825	3,175	3,164
Rhode Island	15,449	11,065	953	3,125	6,987	4,038	1,021	2,529	488	346	48	147	151
South Carolina	78,818	59,267	4,899	23,174	31,194	16,255	3,693	10,743	1,819	3,296	355	1,567	1,374
South Dakota	10,166	7,113	547	3,375	3,191	2,626	731	1,710	185	427	44	223	160
Tennessee	111,016	84,211	6,379	32,810	45,022	22,581	5,145	14,726	2,710	4,224	438	2,003	1,783
Texas	312,003	245,835	22,133	105,602	118,100	53,928	14,523	33,609	5,796	12,240	1,643	6,132	4,465
Utah	29,708	23,821	2,067	11,589	10,165	5,016	1,895	2,684	437	871	146	463	262
Vermont	9,945	7,134	705	1,917	4,512	2,561	657	1,565	339	250	33	93	124
Virginia	101,254	75,916	6,649	29,327	39,940	21,557	5,341	13,759	2,457	3,781	460	1,723	1,598
Washington	72,785	53,453	5,787	20,453	27,213	16,307	4,933	9,679	1,695	3,025	459	1,399	1,167
West Virginia	41,030	28,751	1,877	9,076	17,798	10,890	2,202	7,213	1,475	1,389	137	520	732
Wisconsin	77,143	53,341	3,734	19,077	30,530	20,988	6,227	12,825	1,936	2,814	348	1,223	1,243
Wyoming	6,309	4,889	436	2,443	2,010	1,164	338	713	113	256	26	144	86

(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 2010—Continued

State or area	Total	Children under age 18 of—				Disabled adult children of—				Students aged 18–19 of—			
		Subtotal	Retired workers	Deceased workers	Disabled workers	Subtotal	Retired workers	Deceased workers	Disabled workers	Subtotal	Retired workers	Deceased workers	Disabled workers
Outlying areas													
American Samoa	2,019	1,882	319	813	750	117	27	76	14	20	a	a	a
Guam	2,511	2,260	473	1,227	560	187	55	119	13	64	15	42	7
Northern Mariana Islands	684	610	239	293	78	47	a	a	a	27	8	19	0
Puerto Rico	92,198	67,725	6,640	18,308	42,777	23,428	6,304	14,907	2,217	1,045	183	390	472
U.S. Virgin Islands	1,898	1,515	336	705	474	329	112	198	19	54	16	28	10
Foreign countries	28,481	22,610	8,047	11,193	3,370	5,233	a	a	a	638	a	a	a

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

a. Suppressed to avoid disclosing information about particular individuals.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J11—Number and total monthly benefits for beneficiaries in foreign countries, December 2010

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
Total	548,312	333,244	13,349	86,594	86,644	28,481	320,751	209,412
Africa	2,957	1,733	211	235	184	594	2,387	1,595
Asia	96,878	55,341	2,255	11,525	20,480	7,277	56,049	36,766
China	1,079	756	30	57	102	134	835	632
Cyprus	518	322	27	94	49	26	386	254
Hong Kong	1,483	1,015	25	206	184	53	1,093	818
India	1,733	1,209	94	129	178	123	1,452	1,049
Israel	10,242	5,958	269	1,440	1,618	957	7,861	5,280
Japan	45,706	25,530	95	3,918	15,618	545	17,351	11,362
Jordan	502	176	36	49	33	208	304	140
Lebanon	591	289	24	77	55	146	390	218
Philippines	24,470	13,123	1,209	4,877	1,625	3,636	17,980	10,835
South Korea	2,430	1,647	26	108	601	48	1,164	893
Taiwan	815	601	32	41	89	52	722	567
Thailand	3,457	2,666	180	137	109	365	3,538	2,829
Turkey	831	536	28	156	68	43	701	473
Yemen	1,218	442	63	126	52	535	741	367
Central America and Caribbean	27,228	19,418	1,358	2,342	1,454	2,656	22,064	16,627
Barbados	1,080	905	28	77	48	22	968	833
Belize	556	417	21	31	31	56	497	399
Costa Rica	4,937	3,530	250	468	314	375	4,649	3,519
Dominican Republic	7,485	4,915	464	559	384	1,163	5,294	3,742
El Salvador	1,470	1,097	71	119	72	111	1,070	816
Guatemala	1,604	1,114	86	188	81	135	1,255	897
Honduras	1,093	717	63	108	51	154	909	638
Jamaica	2,771	2,190	83	206	140	152	2,213	1,810
Nicaragua	1,111	775	77	77	62	120	833	612
Panama	1,994	1,371	135	180	109	199	1,753	1,278
Trinidad and Tobago	1,053	832	32	91	49	49	917	739
Europe	226,044	142,000	4,495	35,824	36,587	7,138	127,088	83,485
Austria	2,863	1,851	48	432	438	94	1,540	1,009
Belgium	1,995	1,225	20	304	376	70	1,134	733
Croatia	1,525	1,008	118	192	116	91	1,346	937
Czech Republic	808	554	48	104	43	59	757	550
Denmark	1,218	748	27	197	201	45	876	547
Finland	947	606	32	123	134	52	578	389
France	13,216	8,540	84	1,927	2,252	413	8,050	5,623
Germany	38,484	23,757	714	5,974	6,653	1,386	18,973	11,493
Greece	23,729	14,432	532	4,358	3,726	681	13,464	8,789
Hungary	2,032	1,512	86	232	114	88	1,932	1,507
Ireland	9,596	6,415	179	1,221	1,343	438	5,969	4,253
Italy	32,607	19,389	466	6,735	5,140	877	18,244	11,659
Malta	657	375	30	132	82	38	533	326
Netherlands	5,240	3,299	60	721	984	176	2,469	1,577
Norway	6,980	4,199	79	1,215	1,336	151	2,941	1,794
Poland	10,553	6,629	344	1,537	1,758	285	5,411	3,398
Portugal	12,485	8,788	562	1,574	1,256	305	7,846	5,781
Romania	713	559	42	43	41	28	512	398
Serbia and Montenegro	1,020	677	74	154	66	49	804	547
Spain	11,121	6,606	236	2,109	1,813	357	7,001	4,469
Sweden	4,945	3,296	75	485	909	180	2,123	1,420
Switzerland	7,558	5,058	56	848	1,431	165	3,394	2,342
United Kingdom	33,346	21,016	474	4,827	6,066	963	19,371	12,755

(Continued)

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J11—Number and total monthly benefits for beneficiaries in foreign countries, December 2010—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
North America	159,245	90,242	3,634	32,641	24,411	8,317	84,591	50,289
Canada	108,194	64,983	2,291	18,986	19,460	2,474	53,802	33,963
Mexico	50,788	25,071	1,341	13,613	4,931	5,832	30,550	16,149
Oceania	11,771	7,964	364	1,273	1,581	589	8,351	6,003
Australia	9,813	6,637	285	1,116	1,447	328	6,646	4,738
New Zealand	1,413	1,021	47	100	110	135	1,282	996
South America	19,223	13,618	692	2,346	1,479	1,088	15,165	11,171
Argentina	3,782	2,515	71	620	453	123	2,928	2,071
Brazil	2,179	1,372	62	394	191	160	1,847	1,215
Chile and Easter Island	1,912	1,310	56	282	169	95	1,572	1,133
Colombia	4,762	3,627	239	404	239	253	3,700	2,867
Ecuador	3,030	2,280	114	257	171	208	2,260	1,763
Peru	1,532	1,064	82	164	107	115	1,253	905
Uruguay	911	711	29	86	65	20	719	580
U.S. Overseas Military Base	4,966	2,928	340	408	468	822	5,058	3,475

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

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

a. Countries with 500 or more beneficiaries are shown separately. The total and continent subtotals include all foreign residents.

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

State or area	All disabled beneficiaries			Disabled workers			Disabled widow(er)s			Disabled adult children		
	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	9,398,104	1,018.40	948.40	8,203,951	1,067.80	949.50	244,953	681.30	648.60	949,200	678.80	650.90
Alabama	244,892	999.70	948.00	216,038	1,048.00	949.60	8,273	651.00	649.50	20,581	632.90	646.00
Alaska	13,595	1,015.80	947.70	12,119	1,056.80	948.70	276	754.70	746.60	1,200	661.30	648.10
Arizona	160,442	1,067.40	949.40	144,342	1,109.00	1,048.40	3,568	709.70	649.70	12,532	690.60	653.00
Arkansas	150,228	973.30	947.90	133,719	1,018.10	950.00	4,726	615.30	357.80	11,783	608.80	430.70
California	758,236	1,042.60	949.00	662,232	1,091.40	1,048.00	16,173	735.70	649.60	79,831	700.70	651.40
Colorado	104,647	1,035.10	949.00	94,404	1,073.20	949.00	1,986	694.40	650.20	8,257	681.60	654.40
Connecticut	90,535	1,051.00	949.10	77,298	1,106.30	1,048.30	1,638	668.10	649.60	11,599	736.30	754.10
Delaware	29,016	1,084.0	1,047.50	25,925	1,127.90	1,048.30	651	696.10	650.80	2,440	721.30	752.40
District of Columbia	14,580	908.90	847.30	12,843	950.00	847.30	228	642.40	408.40	1,509	599.70	420.60
Florida	546,075	1,032.30	949.40	488,461	1,074.80	949.40	13,377	659.60	648.80	44,237	675.40	651.00
Georgia	282,844	1,015.80	948.10	248,887	1,066.60	949.30	8,686	625.20	349.40	25,271	650.00	648.50
Hawaii	26,138	1,047.80	948.20	22,686	1,099.00	1,047.40	580	743.20	747.90	2,872	704.70	742.60
Idaho	43,542	1,000.70	948.20	38,716	1,041.50	949.50	970	712.50	653.20	3,856	664.00	651.80
Illinois	322,618	1,036.30	948.80	274,692	1,091.30	1,048.10	8,076	706.30	647.50	39,850	724.20	751.30
Indiana	215,075	1,025.90	948.40	186,817	1,073.40	950.00	5,841	703.60	651.50	22,417	714.20	749.90
Iowa	84,393	966.30	849.60	71,549	1,018.80	948.20	1,797	654.70	645.40	11,047	676.30	654.50
Kansas	79,166	992.60	947.60	69,044	1,038.80	949.90	1,912	658.00	645.90	8,210	681.90	651.00
Kentucky	227,321	995.10	947.60	199,732	1,043.20	949.50	8,161	704.60	647.50	19,428	622.80	421.60
Louisiana	170,027	985.40	849.60	142,796	1,047.60	949.20	6,531	735.40	656.20	20,700	635.00	641.90
Maine	62,914	945.20	850.10	55,525	988.00	946.40	1,373	629.80	391.80	6,016	622.10	642.70
Maryland	131,874	1,051.90	949.10	115,898	1,098.30	1,048.30	2,655	711.50	648.20	13,321	716.80	750.40
Massachusetts	214,176	1,008.00	948.30	187,321	1,055.00	948.80	3,781	680.50	647.60	23,074	680.40	651.20
Michigan	365,926	1,072.50	948.70	314,926	1,124.10	1,047.80	9,297	764.70	748.60	41,703	751.20	754.40
Minnesota	133,120	1,008.50	948.60	115,780	1,057.70	949.10	1,944	667.40	645.90	15,396	681.60	652.60
Mississippi	145,135	961.30	850.20	125,555	1,018.00	947.60	5,322	627.50	361.30	14,258	587.10	417.50
Missouri	230,525	993.30	948.10	202,465	1,040.10	949.20	6,533	642.10	357.50	21,527	659.60	649.40
Montana	29,579	978.00	942.70	26,077	1,019.30	948.30	663	693.30	656.10	2,839	665.50	651.50
Nebraska	46,075	963.70	849.50	39,846	1,010.50	947.40	938	632.10	367.20	5,291	670.60	651.30
Nevada	60,905	1,094.80	1,047.90	55,858	1,128.50	1,047.90	1,404	718.30	648.20	3,643	723.20	750.40
New Hampshire	47,248	1,043.80	949.70	42,504	1,084.60	1,047.60	818	651.90	645.30	3,926	683.40	653.20
New Jersey	215,011	1,114.10	1,048.60	185,970	1,172.20	1,048.9	4,434	704.70	650.30	24,607	748.60	752.30
New Mexico	65,499	984.20	948.50	58,641	1,024.70	949.40	1,432	698.10	649.50	5,426	621.10	408.30
New York	572,318	1,053.00	948.70	490,662	1,108.30	1,048.30	12,695	697.80	649.70	68,961	724.90	751.70
North Carolina	350,580	1,010.90	948.50	310,399	1,061.00	1,048.00	10,003	574.20	332.80	30,178	640.10	647.60
North Dakota	16,230	934.80	849.10	13,570	993.20	945.70	281	608.30	367.50	2,379	639.90	649.30
Ohio	366,024	989.30	947.90	313,105	1,036.50	947.90	10,525	717.20	653.10	42,394	708.40	748.80
Oklahoma	136,267	991.70	947.40	120,235	1,035.80	950.40	4,301	662.40	647.70	11,731	660.40	648.30
Oregon	110,666	1,027.40	948.80	97,786	1,069.70	948.80	2,552	730.10	746.90	10,328	700.10	748.70
Pennsylvania	430,535	1,022.60	947.80	372,365	1,071.80	949.30	10,840	709.50	649.30	47,330	707.60	750.20
Rhode Island	39,180	987.40	947.30	34,381	1,033.10	949.90	761	645.20	645.00	4,038	663.00	650.10
South Carolina	187,255	1,027.10	950.40	164,930	1,080.10	1,048.00	6,070	593.70	350.20	16,255	651.60	647.70
South Dakota	20,766	938.40	849.20	17,722	994.70	948.60	418	613.40	370.70	2,626	609.80	646.40
Tennessee	261,693	991.50	948.20	230,168	1,039.30	949.40	8,944	624.70	369.50	22,581	649.10	646.90
Texas	600,168	1,006.30	947.80	528,238	1,052.70	949.60	18,002	695.90	651.10	53,928	655.50	647.30
Utah	47,894	1,013.10	948.40	41,919	1,056.60	948.40	959	739.50	743.50	5,016	701.30	743.40
Vermont	23,808	953.50	850.40	20,774	998.50	946.80	473	623.90	605.00	2,561	650.10	648.50
Virginia	227,822	1,025.40	949.70	199,923	1,075.90	1,047.50	6,342	669.50	650.80	21,557	661.30	651.20
Washington	179,871	1,039.20	949.20	159,689	1,078.90	949.20	3,875	751.40	747.00	16,307	719.00	750.80
West Virginia	108,743	1,044.50	949.50	93,663	1,102.00	1,048.00	4,190	773.30	750.30	10,890	654.00	648.70
Wisconsin	170,659	1,009.00	947.60	146,516	1,061.10	950.60	3,155	676.80	648.90	20,988	695.60	750.60
Wyoming	13,259	1,019.10	946.20	11,804	1,060.20	949.00	291	690.80	651.50	1,164	684.80	652.70

(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 2010—Continued

State or area	All disabled beneficiaries			Disabled workers			Disabled widow(er)s			Disabled adult children		
	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	1,435	796.30	747.50	1,271	830.50	747.50	47	591.10	391.80	117	506.30	411.60
Guam	1,730	866.00	850.60	1,490	912.80	850.60	53	684.60	642.80	187	544.40	421.10
Northern Mariana Islands	283	638.90	639.60	226	701.80	658.30	10	484.50	380.10	47	369.30	304.10
Puerto Rico	198,171	874.30	848.50	169,369	939.60	848.50	5,374	594.90	381.00	23,428	466.50	402.80
U.S. Virgin Islands	2,113	988.90	946.90	1,731	1,070.60	1,043.30	53	766.30	747.00	329	595.40	482.60
Foreign countries	19,277	842.30	753.60	13,349	978.80	948.90	695	691.50	648.60	5,233	514.10	395.60

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

5.K OASDI Current-Pay Benefits: Direct Deposit

Table 5.K1—Number and percentage of beneficiaries and average monthly benefit, by state or other area and direct deposit status, December 2010

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	54,031,968	1,074.30	47,473,361	87.9	1,103.70	6,558,607	12.1	861.90
Alabama	1,012,056	1,023.50	832,956	82.3	1,066.60	179,100	17.7	823.10
Alaska	78,208	1,021.70	69,649	89.1	1,047.00	8,559	10.9	816.30
Arizona	1,067,717	1,110.70	994,483	93.1	1,131.30	73,234	6.9	830.70
Arkansas	635,041	995.20	535,769	84.4	1,032.20	99,272	15.6	796.00
California	4,979,141	1,075.90	4,494,920	90.3	1,097.60	484,221	9.7	874.00
Colorado	693,341	1,080.50	626,301	90.3	1,103.10	67,040	9.7	869.50
Connecticut	622,167	1,194.00	538,726	86.6	1,221.70	83,441	13.4	1,015.20
Delaware	172,441	1,158.90	157,261	91.2	1,182.60	15,180	8.8	912.40
District of Columbia	74,417	973.70	63,812	85.7	1,005.90	10,605	14.3	780.00
Florida	3,784,225	1,088.30	3,509,614	92.7	1,107.60	274,611	7.3	842.00
Georgia	1,468,209	1,056.00	1,247,470	85.0	1,093.20	220,739	15.0	846.10
Hawaii	227,914	1,092.20	207,923	91.2	1,113.20	19,991	8.8	874.60
Idaho	269,293	1,055.00	245,459	91.1	1,075.10	23,834	8.9	847.90
Illinois	2,033,345	1,115.90	1,812,116	89.1	1,139.20	221,229	10.9	925.20
Indiana	1,191,768	1,122.00	1,049,024	88.0	1,147.70	142,744	12.0	933.10
Iowa	584,113	1,085.00	534,312	91.5	1,104.80	49,801	8.5	872.60
Kansas	488,765	1,103.90	437,077	89.4	1,128.80	51,688	10.6	892.90
Kentucky	894,473	999.10	706,169	78.9	1,048.20	188,304	21.1	814.70
Louisiana	790,617	977.60	646,739	81.8	1,020.00	143,878	18.2	786.90
Maine	299,875	997.60	259,109	86.4	1,025.50	40,766	13.6	820.60
Maryland	850,361	1,121.10	749,462	88.1	1,146.70	100,899	11.9	930.70
Massachusetts	1,140,830	1,090.80	984,409	86.3	1,118.70	156,421	13.7	915.30
Michigan	1,964,862	1,150.40	1,747,377	88.9	1,177.30	217,485	11.1	934.00
Minnesota	882,408	1,108.00	800,253	90.7	1,131.30	82,155	9.3	881.80
Mississippi	596,637	978.80	481,918	80.8	1,025.70	114,719	19.2	781.90
Missouri	1,166,223	1,057.60	1,013,695	86.9	1,086.80	152,528	13.1	864.00
Montana	192,701	1,035.10	171,782	89.1	1,058.80	20,919	10.9	841.10
Nebraska	308,790	1,070.50	279,147	90.4	1,092.50	29,643	9.6	863.80
Nevada	408,113	1,104.70	368,616	90.3	1,123.70	39,497	9.7	927.30
New Hampshire	254,752	1,121.30	225,520	88.5	1,147.90	29,232	11.5	916.10
New Jersey	1,472,335	1,204.50	1,293,290	87.8	1,228.90	179,045	12.2	1,028.00
New Mexico	360,242	1,000.70	318,754	88.5	1,035.50	41,488	11.5	733.80
New York	3,280,575	1,129.30	2,857,103	87.1	1,158.30	423,472	12.9	933.70
North Carolina	1,757,135	1,070.80	1,514,495	86.2	1,107.70	242,640	13.8	840.50
North Dakota	120,098	1,013.80	106,974	89.1	1,036.10	13,124	10.9	831.70
Ohio	2,124,650	1,074.50	1,823,445	85.8	1,102.00	301,205	14.2	908.20
Oklahoma	705,364	1,033.00	616,529	87.4	1,064.80	88,835	12.6	812.70
Oregon	712,216	1,101.40	661,995	92.9	1,117.60	50,221	7.1	888.30
Pennsylvania	2,577,714	1,112.20	2,271,405	88.1	1,135.70	306,309	11.9	937.40
Rhode Island	203,660	1,088.80	177,497	87.2	1,117.90	26,163	12.8	891.60
South Carolina	924,726	1,071.80	792,103	85.7	1,111.20	132,623	14.3	836.20
South Dakota	153,508	1,015.30	139,218	90.7	1,036.80	14,290	9.3	806.50
Tennessee	1,251,947	1,047.50	1,061,324	84.8	1,085.70	190,623	15.2	834.60
Texas	3,440,442	1,033.80	3,011,172	87.5	1,068.20	429,270	12.5	792.30
Utah	324,136	1,082.30	298,825	92.2	1,100.60	25,311	7.8	866.40
Vermont	128,619	1,068.90	112,285	87.3	1,097.20	16,334	12.7	874.40
Virginia	1,284,823	1,083.50	1,098,158	85.5	1,118.10	186,665	14.5	879.80
Washington	1,089,887	1,128.40	1,014,776	93.1	1,146.20	75,111	6.9	887.30
West Virginia	443,911	1,036.60	339,038	76.4	1,082.90	104,873	23.6	887.00
Wisconsin	1,061,501	1,113.70	968,867	91.3	1,133.50	92,634	8.7	907.10
Wyoming	91,019	1,092.30	81,272	89.3	1,117.10	9,747	10.7	885.80
Outlying areas								
Puerto Rico	800,269	723.30	604,691	75.6	781.50	195,578	24.4	543.60
Other ^a	590,388	599.50	519,077	87.9	604.60	71,311	12.1	563.00

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

Type of beneficiary and age	All beneficiaries	Beneficiaries with representative payee	
		Number	Percentage of all beneficiaries
Total	54,031,968	5,487,901	10.2
Adults	49,719,414	1,562,340	3.1
Retired workers	34,593,080	472,404	1.4
Under 65	3,432,082	7,057	0.2
65–74	17,125,797	158,567	0.9
75–84	10,039,263	147,968	1.5
85 or older	3,995,938	158,812	4.0
Disabled workers	8,203,951	927,994	11.3
Under 35	516,818	164,107	31.8
35–44	1,009,506	179,756	17.8
45–54	2,424,569	284,693	11.7
55–FRA	4,253,058	299,438	7.0
Wives and husbands	2,476,836	22,901	0.9
Under 65	369,089	2,901	0.8
65–74	1,191,813	9,499	0.8
75–84	755,965	7,419	1.0
85 or older	159,969	3,082	1.9
Widow(er)s ^a	4,200,594	123,759	2.9
Under 65	612,737	2,662	0.4
65–74	1,145,470	18,432	1.6
75–84	1,362,487	39,697	2.9
85 or older	1,079,900	62,968	5.8
Disabled widow(er)s	244,953	15,282	6.2
Under 55	33,837	2,256	6.7
55–FRA	211,116	13,026	6.2
Children	4,312,554	3,925,561	91.0
Under age 18	3,208,791	3,206,226	99.9
In custody of parent payee	2,877,565	2,877,565	100.0
Not in custody of parent payee	331,226	328,661	99.2
Disabled adult children	949,200	713,592	75.2
Under 35	286,723	200,447	69.9
35–44	208,840	148,462	71.1
45–54	238,424	185,269	77.7
55 or older	215,213	179,414	83.4
Students, aged 18–19	154,563	5,743	3.7

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

NOTE: FRA = full retirement age.

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 1983–2010, 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
2004	106,096	71,782	2,826	20,308	9,835	1,345
2005	112,910	76,590	2,974	21,554	10,443	1,349
2006	127,978	85,862	2,956	26,495	11,273	1,392
2007	146,199	96,970	2,752	32,484	12,525	1,468
2008	155,242	102,806	2,639	34,925	13,396	1,476
2009	163,866	108,591	2,538	37,106	14,171	1,460
2010	173,865	115,219	2,481	39,563	15,086	1,516
Australia	2,376	1,819	100	388	50	19
Austria	1,483	1,090	42	246	76	29
Belgium	890	610	4	181	82	13
Canada	51,686	33,404	1,144	10,317	6,395	426
Chile	133	101	0	24	8	0
Czech Republic	18	14	0	0	^b	^b
Denmark	238	166	^b	62	^b	0
Finland	352	240	16	67	21	8
France	5,316	3,760	25	1,031	435	65
Germany	21,637	15,906	492	3,580	1,429	230
Greece	4,051	2,807	123	719	347	55
Ireland	2,530	1,789	14	541	152	34
Italy	9,799	6,177	70	1,980	1,452	120
Japan	32,607	18,803	13	12,100	1,561	130
Luxembourg	75	53	4	13	^b	^b
Netherlands	3,059	2,134	7	675	211	32
Norway	4,286	2,812	51	894	497	32
Poland	1,810	1,228	4	502	65	11
Portugal	2,154	1,413	102	310	299	30
South Korea	1,246	835	^b	384	20	^b
Spain	3,085	1,953	67	647	361	57
Sweden	2,976	2,162	27	625	127	35
Switzerland	4,602	3,294	37	946	283	42
United Kingdom	17,456	12,649	133	3,331	1,200	143

(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 1983–2010, 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	138.42	89.42
2004	173.70	202.10	367.43	66.37	142.91	96.73
2005	180.95	209.68	392.57	69.85	149.14	104.17
2006	188.44	220.28	411.64	78.79	155.37	106.01
2007	193.20	227.54	431.37	84.79	165.36	114.49
2008	204.94	241.97	456.78	91.10	177.16	121.37
2009	205.89	243.24	461.52	92.41	179.16	126.38
2010	206.62	244.34	463.95	93.32	181.74	123.36
Australia	211.87	220.52	524.14	96.77	209.43	96.89
Austria	212.50	240.38	372.12	82.08	180.70	123.24
Belgium	207.25	244.60	668.25	85.30	185.72	146.69
Canada	184.44	215.09	414.18	79.32	156.91	123.54
Chile	204.03	226.39	0	93.04	254.75	0
Czech Republic	163.39	162.43	0	0	b	b
Denmark	184.94	211.73	b	95.85	b	0
Finland	208.92	229.15	486.13	92.49	180.19	98.13
France	224.10	265.00	536.80	92.04	184.67	96.55
Germany	234.83	267.95	498.34	78.05	185.37	127.70
Greece	188.66	208.14	439.06	82.85	172.05	122.60
Ireland	212.88	248.50	683.75	86.85	221.52	111.06
Italy	192.82	231.71	601.01	81.70	164.47	129.30
Japan	210.30	266.77	470.54	116.87	259.07	126.09
Luxembourg	263.64	302.55	273.25	87.85	b	b
Netherlands	197.16	231.59	728.71	87.04	195.44	118.72
Norway	197.60	226.35	402.81	90.06	209.49	164.06
Poland	130.10	150.57	259.75	71.65	192.35	97.09
Portugal	218.02	228.66	553.07	85.13	198.61	144.37
South Korea	200.15	240.08	b	104.05	318.95	b
Spain	186.84	214.81	538.06	80.30	170.65	127.84
Sweden	179.92	204.72	335.41	88.16	197.34	103.26
Switzerland	193.84	224.06	514.38	82.74	184.25	108.38
United Kingdom	257.29	304.40	580.65	90.46	204.07	121.76

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

- a. Includes nondisabled and disabled widow(er)s, mothers and fathers, and parents.
- b. Suppressed to avoid disclosing information about particular individuals.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

A vertical strip on the left side of the page shows a close-up of the stars and stripes of the American flag. The stars are white and five-pointed, set against a dark blue background. Below the stars, the horizontal stripes of the flag are visible, alternating between light and dark shades.

Old-Age, Survivors, and Disability Insurance

Benefits Awarded

Summary	6.1
Retired Workers	6.11
Disabled Workers	6.21
Dependents and Survivors	6.25

Benefits Withheld **6.40**

Benefits Terminated **6.44**

6.A OASDI Benefits Awarded: Summary

Table 6.A1—Number, by type of benefit, 1940–2010

Year	All benefits ^a	Retired workers	Disabled workers	Wives and husbands of—		Children of—			Widowed mothers and fathers	Widow(er)s	Parents
				Retired workers	Disabled workers	Retired workers	Deceased workers	Disabled workers			
Total	224,954,217	93,721,481	26,704,300	20,553,279	4,096,188	8,076,704	23,176,072	18,042,708	5,027,805	24,173,306	114,940
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 ^b	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 ^c	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
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
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
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
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
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
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
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
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
1975	4,427,138	1,505,750	592,049	350,558	148,741	225,579	591,118	515,216	116,224	377,246	969
1976	4,351,654	1,475,773	551,460	346,623	147,407	236,805	578,905	511,487	113,520	385,373	914
1977	4,610,730	1,593,631	568,874	390,874	151,938	259,447	587,589	518,477	118,821	416,735	870
1978	4,166,571	1,472,786	464,415	346,956	130,161	214,284	566,992	453,382	110,015	403,679	844
1979	4,229,286	1,590,854	416,713	358,163	113,243	247,800	544,549	399,172	110,424	445,555	788
1980	4,214,567	1,612,669	396,559	360,693	108,500	248,658	540,246	385,208	107,809	452,156	724
1981	4,029,827	1,578,990	351,847	338,540	95,575	211,406	535,487	339,654	99,653	477,121	606
1982	3,840,579	1,618,411	297,131	349,967	77,835	182,849	473,396	260,470	86,786	492,451	498
1983	3,755,994	1,669,738	311,549	356,274	80,079	144,945	380,992	226,895	82,464	501,688	431
1984	3,690,103	1,607,370	361,998	342,691	81,834	131,986	351,326	238,252	73,794	499,677	383
1985	3,796,394	1,690,490	377,371	356,558	83,511	128,076	332,531	253,025	72,241	501,673	381
1986	3,853,454	1,734,248	416,865	358,115	82,435	122,652	319,808	258,167	69,340	491,052	344
1987	3,733,853	1,681,716	415,848	333,333	77,316	117,984	310,573	256,742	64,777	475,035	286
1988	3,680,969	1,654,068	409,490	316,929	73,790	116,659	324,346	265,026	62,676	457,574	263
1989	3,646,349	1,656,744	425,582	310,498	69,113	106,491	307,484	261,387	59,525	449,139	281
1990	3,716,924	1,664,754	467,977	308,980	69,667	108,105	303,616	283,586	58,060	451,862	233
1991	3,865,426	1,695,346	536,434	307,000	72,754	107,261	301,459	318,188	57,896	468,788	246
1992	4,050,849	1,707,949	636,637	304,764	78,083	108,686	304,300	381,585	56,402	472,078	298
1993	4,001,201	1,661,281	635,238	290,728	74,605	106,566	311,290	398,598	56,408	466,198	238
1994	3,940,342	1,625,347	631,870	275,025	69,549	102,983	310,051	411,205	54,732	459,340	213

(Continued)

6.A OASDI Benefits Awarded: Summary

Table 6.A1—Number, by type of benefit, 1940–2010—Continued

Year	All benefits ^a	Retired workers	Disabled workers	Wives and husbands of—		Children of—			Widowed mothers and fathers	Widow(er)s	Parents
				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
1996	3,793,238	1,581,452	624,335	244,014	57,528	98,655	302,480	397,350	49,150	438,081	177
1997	3,865,966	1,718,623	587,417	268,012	50,818	97,594	297,204	362,548	43,504	440,076	157
1998	3,800,259	1,631,511	608,131	263,668	47,550	96,893	294,851	371,426	42,395	443,669	152
1999	3,917,099	1,690,024	620,488	275,568	46,164	99,826	295,196	378,144	41,756	469,806	118
2000	4,290,080	1,960,649	621,650	341,503	43,941	115,358	297,686	363,632	40,491	505,021	135
2001	4,161,971	1,779,228	691,309	314,547	43,412	110,680	302,445	383,049	41,323	495,848	129
2002	4,335,714	1,812,551	750,003	317,685	45,600	116,186	310,395	419,780	40,829	522,537	139
2003	4,321,778	1,791,316	777,461	305,831	47,183	111,992	305,409	434,953	39,206	508,306	121
2004	4,458,816	1,883,060	795,775	319,430	48,016	115,391	309,472	433,699	40,030	513,839	104
2005	4,672,152	2,000,157	829,687	329,225	50,187	123,494	314,786	469,267	38,248	516,949	152
2006	4,621,110	1,999,019	798,675	328,430	49,521	126,860	321,155	449,020	35,981	512,320	129
2007	4,710,830	2,035,780	804,787	316,782	47,583	126,678	322,326	453,292	33,597	569,862	143
2008	5,134,644	2,278,997	877,226	344,003	50,756	140,581	329,397	490,895	32,717	589,940	132
2009	5,728,086	2,739,966	970,696	375,123	54,112	156,412	319,127	532,132	32,878	547,495	145
2010	5,697,011	2,634,439	1,026,988	354,947	53,987	155,193	320,293	569,020	31,797	550,223	124

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

NOTES: Benefits not necessarily payable at time of award.

Beginning with 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

... = not applicable.

- Annual totals for 1966 through 2002 include special age-72 beneficiaries; for all years combined, these awards number 1,267,434 and are included in the cumulative total.
- January–November.
- Includes December 1958.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 1940–2010 (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
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

(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 1940–2010 (in dollars)—Continued

Year ^a	Average primary insurance amount for retired workers (dollars)			Average monthly benefit (dollars)						Non-disabled widows
				Retired workers			Disabled workers			
	All	Men	Women	All	Men	Women	All	Men	Women	
2001 (Jan.–Nov.)	953.90	1,134.50	730.80	855.70	1,008.40	667.20	847.00	961.70	711.00	735.80
2001 (Dec.)	982.10	1,168.90	749.90	881.10	1,039.10	684.70	868.40	982.70	734.90	717.10
2002 (Jan.–Nov.)	1,026.30	1,219.00	788.10	914.10	1,076.80	712.90	897.50	1,019.50	753.30	750.50
2002 (Dec.)	1,029.90	1,230.00	788.50	916.90	1,084.50	714.80	906.70	1,028.10	762.50	751.90
2003 (Jan.–Nov.)	1,067.10	1,272.60	824.90	939.70	1,109.40	739.60	935.80	1,061.50	786.90	779.00
2003 (Dec.)	1,083.60	1,297.70	830.40	963.80	1,142.30	752.70	946.80	1,075.80	794.60	780.00
2004 (Jan.–Nov.)	1,072.50	1,277.60	834.20	936.10	1,104.70	740.20	942.60	1,068.40	795.70	768.10
2004 (Dec.)	1,090.70	1,309.70	853.80	961.20	1,136.50	771.50	965.80	1,093.50	819.00	785.90
2005 (Jan.–Nov.)	1,106.10	1,314.10	869.30	960.40	1,130.30	767.00	961.00	1,086.80	815.90	780.50
2005 (Dec.)	1,135.70	1,367.90	899.00	1,011.00	1,189.20	829.40	997.20	1,128.50	846.10	809.40
2006 (Jan.–Nov.)	1,163.30	1,376.70	923.70	1,020.50	1,195.70	823.80	999.00	1,129.00	851.00	818.70
2006 (Dec.)	1,193.60	1,415.30	947.50	1,045.90	1,232.40	838.90	1,020.60	1,148.00	875.60	854.90
2007 (Jan.–Nov.)	1,212.90	1,428.00	972.40	1,069.80	1,249.90	868.30	1,030.50	1,161.90	880.60	861.40
2007 (Dec.)	1,223.60	1,445.40	976.50	1,081.00	1,269.60	870.80	1,045.70	1,174.70	898.20	873.80
2008 (Jan.–Nov.)	1,259.00	1,476.00	1,014.70	1,113.80	1,297.40	907.10	1,053.90	1,184.60	905.10	868.90
2008 (Dec.)	1,297.90	1,552.10	1,066.20	1,083.30	1,256.20	925.70	1,109.10	1,245.30	953.60	891.40
2009 (Jan.–Dec.)	1,339.70	1,563.60	1,087.20	1,181.60	1,365.60	974.10	1,119.90	1,255.00	963.10	916.30
2010 (Jan.–Dec.)	1,350.60	1,563.70	1,113.80	1,193.10	1,370.50	996.00	1,128.80	1,261.80	971.80	913.60

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

NOTES: Beginning with 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

. . . = not applicable.

a. Some years are shown in several parts to reflect changes in benefit rates during the year.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 6.A3—Number and average monthly benefit, by type of benefit, sex, age, and basis of entitlement, 2010

Age and basis of entitlement	Total		Male		Female	
	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)
Retired workers^b						
Total	2,634,439	1,193.10	1,386,514	1,370.50	1,247,925	996.00
62–64	1,589,165	1,047.00	802,164	1,210.30	787,001	880.60
65–69	1,010,390	1,418.40	572,073	1,595.60	438,317	1,187.10
70 or older	34,884	1,326.30	12,277	1,351.30	22,607	1,312.70
Disabled workers						
Total	1,026,988	1,128.90	555,999	1,261.90	470,989	971.80
Under 30	78,047	700.40	43,597	714.90	34,450	682.00
30–39	111,797	949.00	55,664	1,009.80	56,133	888.80
40–49	228,046	1,063.20	116,382	1,175.40	111,664	946.30
50–54	205,729	1,155.80	108,655	1,302.20	97,074	991.90
55–59	239,561	1,256.20	134,811	1,417.00	104,750	1,049.20
60 or older	163,808	1,327.20	96,890	1,495.70	66,918	1,083.10
Spouses						
Total	408,934	414.80	24,993	342.00	383,941	419.60
Spouses of retired workers						
Subtotal	354,947	433.80	21,411	360.40	333,536	438.50
Entitlement based on care of children	11,768	496.50	68	^c	11,710	497.10
Entitlement based on age	343,179	431.70	21,343	360.30	321,826	436.40
62–64	212,866	387.30	6,116	287.40	206,740	390.20
65–69	113,559	525.30	10,488	431.60	103,071	534.80
70 or older	16,754	361.40	4,739	296.60	12,015	387.00
Spouses of disabled workers						
Subtotal	53,987	289.96	3,582	231.90	50,405	294.10
Entitlement based on care of children	18,062	209.25	1,186	165.50	16,876	212.30
Entitlement based on age	35,925	330.54	2,396	264.70	33,529	335.20
Children						
Total	1,044,506	470.30	543,255	472.00	501,251	468.30
By age						
Under age 18	662,361	411.10	336,447	410.40	325,914	411.80
Disabled, aged 18 or older	81,681	489.40	47,429	487.00	34,252	492.80
Students aged 18–19	300,464	595.40	159,379	597.70	141,085	592.90
By basis of entitlement						
Children of retired workers	155,193	545.30	81,546	543.10	73,647	547.80
Children of deceased workers	320,293	752.30	167,086	754.00	153,207	750.50
Children of disabled workers	569,020	291.00	294,623	292.50	274,397	289.40
Widowed mothers and fathers						
Total	31,797	821.20	4,269	691.30	27,528	841.30
By age						
Under 30	3,331	665.90	231	^c	3,100	675.20
30–39	9,616	737.20	1,091	634.30	8,525	750.40
40–49	12,842	873.30	1,820	704.10	11,022	901.20
50–59	5,366	940.70	1,024	767.80	4,342	981.50
60 or older	642	843.90	103	^c	539	881.80
Nondisabled widow(er)s						
Total	516,964	913.70	38,530	674.70	478,434	932.90
By age						
60–64	174,084	1,064.50	18,057	863.30	156,027	1,087.80
65–69	110,771	913.90	7,322	740.50	103,449	926.20
70–74	64,558	727.90	3,537	396.40	61,021	747.10
75 or older	167,551	828.30	9,614	372.60	157,937	856.00

(Continued)

6.A OASDI Benefits Awarded: Summary

Table 6.A3—Number and average monthly benefit, by type of benefit, sex, age, and basis of entitlement, 2010—Continued

Age and basis of entitlement	Total		Male		Female	
	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)	Number	Average monthly benefit ^a (dollars)
Disabled widow(er)s						
Total	33,259	666.80	2,740	510.10	30,519	680.90
By age						
50–54	16,298	663.20	1,258	489.60	15,040	677.80
55–59	16,707	668.90	1,462	526.20	15,245	682.60
60 or older	254	^c	20	^c	234	^c

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

NOTES: Effective 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

Beginning with this year's edition we have removed the race breakdown because the quality of the data has become too inconsistent.

- a. Benefits awarded before the December cost-of-living increase are converted to the December rates before averages are computed.
- b. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.
- c. Average benefits are not shown for fewer than 500 beneficiaries.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

6.A OASDI Benefits Awarded: Summary

Table 6.A4—Number and average monthly benefit for retired and disabled workers, by age and sex, 2010

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	2,634,439	1,193.10	1,386,514	1,370.50	1,247,925	996.00
62–64	1,589,165	1,047.00	802,164	1,210.30	787,001	880.60
62	1,189,199	1,005.50	591,129	1,162.80	598,070	850.10
63	216,169	1,150.70	114,855	1,316.90	101,314	962.40
64	183,797	1,193.40	96,180	1,375.10	87,617	993.90
65–69	1,010,390	1,418.40	572,073	1,595.60	438,317	1,187.10
65	270,709	1,370.10	147,944	1,544.60	122,765	1,159.70
66	688,718	1,431.00	398,285	1,608.90	290,433	1,187.10
Disability conversions	333,120	1,243.70	180,483	1,413.80	152,637	1,042.70
New entitlements	355,598	1,606.60	217,802	1,770.70	137,796	1,347.10
67	25,952	1,535.40	14,534	1,711.40	11,418	1,311.40
68	13,550	1,464.30	6,619	1,652.80	6,931	1,284.30
69	11,461	1,480.20	4,691	1,637.00	6,770	1,371.50
70–74	29,953	1,429.70	10,083	1,512.00	19,870	1,388.00
75 or older	4,931	698.30	2,194	612.90	2,737	766.80
Disabled workers						
Total	1,026,988	1,128.90	555,999	1,261.90	470,989	971.80
Under 25	38,649	587.30	22,666	599.90	15,983	569.40
25–29	39,398	811.30	20,931	839.40	18,467	779.40
30–34	46,342	913.20	23,048	959.90	23,294	867.00
35–39	65,455	974.40	32,616	1,045.00	32,839	904.20
40–44	93,671	1,024.50	47,546	1,122.40	46,125	923.60
45–49	134,375	1,090.20	68,836	1,212.10	65,539	962.20
50–54	205,729	1,155.80	108,655	1,302.20	97,074	991.90
50	48,945	1,100.60	25,739	1,240.60	23,206	945.30
51	38,172	1,148.10	20,116	1,288.20	18,056	992.00
52	39,793	1,162.70	20,977	1,311.10	18,816	997.30
53	39,298	1,180.20	20,746	1,332.90	18,552	1,009.50
54	39,521	1,200.30	21,077	1,351.80	18,444	1,027.10
55–59	239,561	1,256.20	134,811	1,417.00	104,750	1,049.20
55	56,136	1,213.20	31,479	1,362.50	24,657	1,022.70
56	45,647	1,244.20	25,222	1,404.90	20,425	1,045.70
57	45,913	1,262.10	25,864	1,423.40	20,049	1,054.10
58	45,863	1,276.70	25,954	1,441.70	19,909	1,061.70
59	46,002	1,294.00	26,292	1,463.00	19,710	1,068.60
60–65	163,808	1,327.20	96,890	1,495.70	66,918	1,083.10
60	47,834	1,319.00	28,094	1,484.90	19,740	1,082.90
61	40,954	1,331.50	23,963	1,501.50	16,991	1,091.80
62	32,894	1,347.00	19,564	1,522.80	13,330	1,089.00
63	22,990	1,332.90	13,578	1,508.60	9,412	1,079.30
64	13,209	1,311.10	7,972	1,468.80	5,237	1,070.90
65	5,927	1,266.50	3,719	1,409.10	2,208	1,026.20

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

NOTES: Effective 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

Effective 2006, age is based on date of entitlement and not date of award. Entitlement can be retroactive and thus precede the date of award.

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

6.A OASDI Benefits Awarded: Summary

Table 6.A5—Number and average monthly benefit with reduction for early retirement, by type of benefit, age, and sex, 2010

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	1,889,014	1,096.90	967,655	1,265.60	921,359	919.60
62	1,189,199	1,005.50	591,129	1,162.80	598,070	850.10
63	216,169	1,150.70	114,855	1,316.90	101,314	962.40
64	183,632	1,193.30	96,074	1,375.10	87,558	993.80
65	269,119	1,372.00	147,137	1,546.30	121,982	1,161.80
66	30,657	1,270.40	18,454	1,434.40	12,203	1,022.50
Disability conversions	30,226	1,272.00	18,190	1,436.00	12,036	1,024.10
New entitlements	431	1,061.60	264	1,265.20	167	745.90
67 or older	238	607.40	6	930.00	232	599.10
Disabled workers						
Total	48,082	1,278.20	28,796	1,449.30	19,286	1,022.70
62	20,644	1,291.70	12,251	1,472.60	8,393	1,027.60
63	14,892	1,285.20	8,870	1,459.50	6,022	1,028.60
64	8,755	1,252.60	5,346	1,409.40	3,409	1,006.70
65	3,791	1,236.10	2,329	1,379.20	1,462	1,008.10
Wives and husbands						
Total	284,657	389.30	9,940	297.50	274,717	392.60
By basis of entitlement						
Wives and husbands of retired workers	252,586	397.00	8,359	303.50	244,227	400.20
Wives and husbands of disabled workers	32,071	328.50	1,581	265.60	30,490	331.70
By sex						
Wives	274,717	392.60	...	...	274,717	392.60
62	144,467	366.70	...	...	144,467	366.70
63	44,443	369.70	...	...	44,443	369.70
64	46,333	445.40	...	...	46,333	445.40
65	38,508	450.60	...	...	38,508	450.60
66	270	417.10	...	...	270	417.10
67 or older	696	494.10	...	...	696	494.10
Husbands	9,940	297.50	9,940	297.50	...	...
Nondisabled widow(er)s						
Total	219,186	1,030.90	20,624	860.30	198,562	1,048.60
Nondisabled widows	198,562	1,048.60	...	...	198,562	1,048.60
60	64,701	1,087.60	...	...	64,701	1,087.60
61	25,785	1,127.80	...	...	25,785	1,127.80
62	24,292	1,081.20	...	...	24,292	1,081.20
63	20,776	1,052.10	...	...	20,776	1,052.10
64	20,353	1,083.80	...	...	20,353	1,083.80
65	38,362	960.90	...	...	38,362	960.90
66	293	608.60	...	...	293	608.60
67–69	779	441.70	...	...	779	441.70
70 or older	3,221	373.80	...	...	3,221	373.80
Nondisabled widowers	20,624	860.30	20,624	860.30	...	...

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

NOTES: Effective 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

Effective 2006, age is based on date of entitlement and not date of award. Entitlement can be retroactive and thus precede the date of award.

... = not applicable.

a. Benefits awarded before the December cost-of-living increase are converted to the December rates before averages are computed.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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, 2010

State or area	Retired workers			Disabled workers		
	Number	Percent	Average monthly benefit ^a (dollars)	Number	Percent	Average monthly benefit ^a (dollars)
All areas	2,634,439	100.0	1,193.10	1,026,988	100.0	1,128.90
Alabama	44,334	1.7	1,169.70	26,763	2.6	1,111.00
Alaska	5,253	0.2	1,142.50	1,621	0.2	1,141.30
Arizona	54,965	2.1	1,204.20	15,413	1.5	1,190.40
Arkansas	27,057	1.0	1,128.60	15,239	1.5	1,074.70
California	267,927	10.2	1,165.90	77,183	7.5	1,098.60
Colorado	40,175	1.5	1,185.30	12,949	1.3	1,162.50
Connecticut	30,211	1.1	1,321.10	9,133	0.9	1,215.70
Delaware	8,412	0.3	1,283.90	2,767	0.3	1,215.90
District of Columbia	3,818	0.1	1,130.00	2,006	0.2	982.60
Florida	179,985	6.8	1,160.90	63,270	6.2	1,123.10
Georgia	79,762	3.0	1,167.80	30,983	3.0	1,139.30
Hawaii	12,613	0.5	1,203.90	2,991	0.3	1,150.30
Idaho	14,003	0.5	1,143.60	4,803	0.5	1,097.50
Illinois	97,579	3.7	1,219.30	34,833	3.4	1,185.30
Indiana	57,037	2.2	1,246.10	25,846	2.5	1,175.60
Iowa	27,633	1.0	1,205.80	8,578	0.8	1,127.30
Kansas	23,523	0.9	1,235.90	8,791	0.9	1,114.70
Kentucky	37,673	1.4	1,133.40	23,731	2.3	1,089.20
Louisiana	33,763	1.3	1,107.10	17,975	1.8	1,069.90
Maine	13,775	0.5	1,096.80	5,071	0.5	1,071.40
Maryland	45,729	1.7	1,276.30	17,044	1.7	1,165.00
Massachusetts	52,188	2.0	1,237.60	21,038	2.0	1,144.70
Michigan	93,477	3.5	1,282.20	43,737	4.3	1,189.60
Minnesota	44,756	1.7	1,261.40	14,642	1.4	1,161.60
Mississippi	25,918	1.0	1,122.70	13,442	1.3	1,084.10
Missouri	52,951	2.0	1,171.00	26,332	2.6	1,112.20
Montana	9,917	0.4	1,113.70	3,173	0.3	1,058.70
Nebraska	14,331	0.5	1,194.90	4,954	0.5	1,086.80
Nevada	24,553	0.9	1,156.80	7,340	0.7	1,183.90
New Hampshire	13,082	0.5	1,265.30	5,808	0.6	1,153.50
New Jersey	74,621	2.8	1,343.50	25,514	2.5	1,254.60
New Mexico	18,291	0.7	1,121.40	7,078	0.7	1,057.70
New York	157,644	6.0	1,254.60	60,184	5.9	1,153.60
North Carolina	89,066	3.4	1,190.40	36,915	3.6	1,127.50
North Dakota	5,429	0.2	1,131.10	1,775	0.2	1,070.00
Ohio	96,141	3.6	1,170.90	44,606	4.3	1,104.50
Oklahoma	32,842	1.2	1,155.30	14,873	1.4	1,077.60
Oregon	38,230	1.5	1,189.40	12,531	1.2	1,141.00
Pennsylvania	114,843	4.4	1,247.40	46,688	4.5	1,123.00
Rhode Island	9,396	0.4	1,226.30	3,927	0.4	1,118.00
South Carolina	46,191	1.8	1,188.80	20,082	2.0	1,140.60
South Dakota	7,288	0.3	1,126.60	2,192	0.2	1,064.80
Tennessee	60,116	2.3	1,171.10	29,251	2.8	1,110.60
Texas	172,359	6.5	1,163.20	68,317	6.7	1,100.10
Utah	16,505	0.6	1,210.30	5,528	0.5	1,135.80

(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, 2010—Continued

State or area	Retired workers			Disabled workers		
	Number	Percent	Average monthly benefit ^a (dollars)	Number	Percent	Average monthly benefit ^a (dollars)
Vermont	6,562	0.2	1,206.90	2,500	0.2	1,061.00
Virginia	66,513	2.5	1,238.80	24,323	2.4	1,142.40
Washington	59,532	2.3	1,252.60	21,844	2.1	1,149.60
West Virginia	18,047	0.7	1,178.90	9,234	0.9	1,122.50
Wisconsin	51,615	2.0	1,243.40	19,105	1.9	1,161.20
Wyoming	5,055	0.2	1,210.00	1,608	0.2	1,141.10
Outlying areas						
Puerto Rico	27,594	1.0	810.70	19,925	1.9	986.60
Other ^b	24,159	0.9	618.80	1,532	0.1	932.90

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

NOTES: Effective 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

Totals do not necessarily equal the sum of rounded components.

a. Benefits awarded before the December cost-of-living increase are converted to the December rates before averages are computed.

b. Includes American Samoa, Guam, Northern Mariana Islands, U.S. Virgin Islands, and foreign countries.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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, 2010

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	1,543,000	1,421,400	17,000	63,300	23,300
62	1,160,900	1,089,000	10,800	36,500	13,900
63	210,000	185,100	3,800	14,300	3,900
64	172,100	147,300	2,400	12,500	5,500
<i>Men</i>					
Subtotal	786,100	721,200	9,600	33,100	11,700
62	585,400	546,800	6,300	19,500	6,100
63	113,000	98,600	2,000	8,100	2,600
64	87,700	75,800	1,300	5,500	3,000
<i>Women</i>					
Subtotal	756,900	700,200	7,400	30,200	11,600
62	575,500	542,200	4,500	17,000	7,800
63	97,000	86,500	1,800	6,200	1,300
64	84,400	71,500	1,100	7,000	2,500
Average primary insurance amount ^c (dollars)					
<i>All beneficiaries</i>					
Total	1,329.00	1,323.20	1,457.10	1,449.70	1,373.10
62	1,322.70	1,318.30	1,431.90	1,441.60	1,341.90
63	1,364.60	1,343.10	1,547.80	1,549.60	1,520.20
64	1,328.00	1,335.10	1,427.20	1,359.00	1,347.70
<i>Men</i>					
Subtotal	1,542.50	1,538.00	1,606.60	1,676.30	1,615.40
62	1,541.00	1,539.40	1,531.50	1,649.30	1,615.10
63	1,557.00	1,535.90	1,796.70	1,765.30	1,629.50
64	1,533.90	1,530.40	1,678.20	1,641.10	1,603.80
<i>Women</i>					
Subtotal	1,107.20	1,102.00	1,263.20	1,201.30	1,128.70
62	1,100.60	1,095.20	1,292.40	1,203.40	1,128.20
63	1,140.50	1,123.40	1,271.20	1,268.00	1,301.60
64	1,114.10	1,128.00	1,130.50	1,137.30	1,040.40
Average monthly benefit ^c (dollars)					
<i>All beneficiaries</i>					
Total	1,058.50	1,052.70	1,160.50	1,173.20	1,113.20
62	1,021.20	1,018.30	1,089.20	1,105.40	1,033.00
63	1,140.80	1,124.90	1,283.60	1,280.00	1,248.20
64	1,209.50	1,215.90	1,286.60	1,248.80	1,220.40
<i>Men</i>					
Subtotal	1,206.70	1,200.70	1,278.50	1,339.10	1,304.90
62	1,168.30	1,166.80	1,164.60	1,253.40	1,228.60
63	1,280.40	1,263.00	1,486.50	1,450.90	1,335.90
64	1,368.10	1,364.10	1,510.80	1,478.30	1,433.30
<i>Women</i>					
Subtotal	904.60	900.20	1,007.30	991.30	919.90
62	871.60	868.50	983.60	935.70	880.00
63	978.20	967.60	1,058.10	1,056.80	1,072.60
64	1,044.70	1,058.70	1,021.60	1,068.40	964.80

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

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

- a. Includes 18,000 awards for which benefits were withheld for reasons other than earnings.
- b. Months of entitlement begin with the month of award and end either in December or the month before the retired-worker benefit is terminated.
- c. Amount for December or the amount for the latest month of entitlement multiplied by the December benefit increase.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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, 2010

Sex and monthly benefit (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	2,634,439	100.0	1,889,014	100.0	745,425	100.0
Less than 500.00	242,526	9.2	198,070	10.5	44,456	6.0
500.00–549.90	55,448	2.1	48,654	2.6	6,794	0.9
550.00–599.90	69,049	2.6	60,233	3.2	8,816	1.2
600.00–649.90	75,364	2.9	65,081	3.4	10,283	1.4
650.00–699.90	83,284	3.2	68,394	3.6	14,890	2.0
700.00–749.90	91,894	3.5	74,911	4.0	16,983	2.3
750.00–799.90	91,336	3.5	73,759	3.9	17,577	2.4
800.00–849.90	92,864	3.5	74,205	3.9	18,659	2.5
850.00–899.90	86,688	3.3	67,258	3.6	19,430	2.6
900.00–949.90	84,940	3.2	64,486	3.4	20,454	2.7
950.00–999.90	82,067	3.1	61,676	3.3	20,391	2.7
1,000.00–1,049.90	83,078	3.2	62,375	3.3	20,703	2.8
1,050.00–1,099.90	79,525	3.0	59,077	3.1	20,448	2.7
1,100.00–1,149.90	78,537	3.0	58,075	3.1	20,462	2.7
1,150.00–1,199.90	76,695	2.9	56,404	3.0	20,291	2.7
1,200.00–1,249.90	74,507	2.8	54,591	2.9	19,916	2.7
1,250.00–1,299.90	71,746	2.7	52,433	2.8	19,313	2.6
1,300.00–1,349.90	71,337	2.7	51,738	2.7	19,599	2.6
1,350.00–1,399.90	67,386	2.6	48,517	2.6	18,869	2.5
1,400.00–1,449.90	74,286	2.8	55,210	2.9	19,076	2.6
1,450.00–1,499.90	90,848	3.4	72,164	3.8	18,684	2.5
1,500.00–1,549.90	87,580	3.3	69,084	3.7	18,496	2.5
1,550.00–1,599.90	81,280	3.1	62,543	3.3	18,737	2.5
1,600.00–1,649.90	76,010	2.9	57,207	3.0	18,803	2.5
1,650.00–1,699.90	68,437	2.6	50,890	2.7	17,547	2.4
1,700.00–1,749.90	64,418	2.4	47,241	2.5	17,177	2.3
1,750.00–1,799.90	57,347	2.2	40,986	2.2	16,361	2.2
1,800.00–1,849.90	48,741	1.9	30,653	1.6	18,088	2.4
1,850.00–1,899.90	46,508	1.8	22,404	1.2	24,104	3.2
1,900.00–1,949.90	41,513	1.6	18,413	1.0	23,100	3.1
1,950.00–1,999.90	35,942	1.4	14,993	0.8	20,949	2.8
2,000.00–2,049.90	33,574	1.3	13,686	0.7	19,888	2.7
2,050.00–2,099.90	29,029	1.1	10,796	0.6	18,233	2.4
2,100.00 or more	140,655	5.3	22,807	1.2	117,848	15.8
Average benefit (dollars)	1,193.10		1,096.90		1,437.10	

(Continued)

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B3—Number and percentage distribution with and without reduction for early retirement, by sex and monthly benefit, 2010—Continued

Sex and monthly benefit (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Men	1,386,514	100.0	967,655	100.0	418,859	100.0
Less than 500.00	96,703	7.0	76,497	7.9	20,206	4.8
500.00–549.90	18,073	1.3	15,337	1.6	2,736	0.7
550.00–599.90	21,915	1.6	18,737	1.9	3,178	0.8
600.00–649.90	23,833	1.7	20,234	2.1	3,599	0.9
650.00–699.90	25,937	1.9	20,801	2.1	5,136	1.2
700.00–749.90	27,172	2.0	21,208	2.2	5,964	1.4
750.00–799.90	27,015	1.9	20,759	2.1	6,256	1.5
800.00–849.90	28,829	2.1	22,151	2.3	6,678	1.6
850.00–899.90	29,353	2.1	22,472	2.3	6,881	1.6
900.00–949.90	31,068	2.2	23,819	2.5	7,249	1.7
950.00–999.90	31,986	2.3	24,505	2.5	7,481	1.8
1,000.00–1,049.90	33,694	2.4	25,969	2.7	7,725	1.8
1,050.00–1,099.90	34,637	2.5	26,505	2.7	8,132	1.9
1,100.00–1,149.90	36,260	2.6	28,081	2.9	8,179	2.0
1,150.00–1,199.90	36,904	2.7	28,432	2.9	8,472	2.0
1,200.00–1,249.90	37,704	2.7	28,986	3.0	8,718	2.1
1,250.00–1,299.90	37,923	2.7	29,075	3.0	8,848	2.1
1,300.00–1,349.90	39,212	2.8	29,980	3.1	9,232	2.2
1,350.00–1,399.90	38,628	2.8	29,396	3.0	9,232	2.2
1,400.00–1,449.90	44,757	3.2	35,142	3.6	9,615	2.3
1,450.00–1,499.90	59,501	4.3	49,511	5.1	9,990	2.4
1,500.00–1,549.90	59,708	4.3	49,595	5.1	10,113	2.4
1,550.00–1,599.90	57,858	4.2	46,907	4.8	10,951	2.6
1,600.00–1,649.90	55,602	4.0	44,421	4.6	11,181	2.7
1,650.00–1,699.90	51,552	3.7	40,813	4.2	10,739	2.6
1,700.00–1,749.90	49,765	3.6	38,925	4.0	10,840	2.6
1,750.00–1,799.90	45,118	3.3	34,512	3.6	10,606	2.5
1,800.00–1,849.90	37,236	2.7	25,298	2.6	11,938	2.9
1,850.00–1,899.90	34,934	2.5	18,492	1.9	16,442	3.9
1,900.00–1,949.90	31,853	2.3	15,506	1.6	16,347	3.9
1,950.00–1,999.90	28,095	2.0	12,858	1.3	15,237	3.6
2,000.00–2,049.90	26,864	1.9	11,947	1.2	14,917	3.6
2,050.00–2,099.90	23,797	1.7	9,625	1.0	14,172	3.4
2,100.00 or more	123,028	8.9	21,159	2.2	101,869	24.3
Average benefit (dollars)	1,370.50		1,265.60		1,612.80	

(Continued)

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B3—Number and percentage distribution with and without reduction for early retirement, by sex and monthly benefit, 2010—Continued

Sex and monthly benefit (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	1,247,925	100.0	921,359	100.0	326,566	100.0
Less than 500.00	145,823	11.7	121,573	13.2	24,250	7.4
500.00–549.90	37,375	3.0	33,317	3.6	4,058	1.2
550.00–599.90	47,134	3.8	41,496	4.5	5,638	1.7
600.00–649.90	51,531	4.1	44,847	4.9	6,684	2.0
650.00–699.90	57,347	4.6	47,593	5.2	9,754	3.0
700.00–749.90	64,722	5.2	53,703	5.8	11,019	3.4
750.00–799.90	64,321	5.2	53,000	5.8	11,321	3.5
800.00–849.90	64,035	5.1	52,054	5.6	11,981	3.7
850.00–899.90	57,335	4.6	44,786	4.9	12,549	3.8
900.00–949.90	53,872	4.3	40,667	4.4	13,205	4.0
950.00–999.90	50,081	4.0	37,171	4.0	12,910	4.0
1,000.00–1,049.90	49,384	4.0	36,406	4.0	12,978	4.0
1,050.00–1,099.90	44,888	3.6	32,572	3.5	12,316	3.8
1,100.00–1,149.90	42,277	3.4	29,994	3.3	12,283	3.8
1,150.00–1,199.90	39,791	3.2	27,972	3.0	11,819	3.6
1,200.00–1,249.90	36,803	2.9	25,605	2.8	11,198	3.4
1,250.00–1,299.90	33,823	2.7	23,358	2.5	10,465	3.2
1,300.00–1,349.90	32,125	2.6	21,758	2.4	10,367	3.2
1,350.00–1,399.90	28,758	2.3	19,121	2.1	9,637	3.0
1,400.00–1,449.90	29,529	2.4	20,068	2.2	9,461	2.9
1,450.00–1,499.90	31,347	2.5	22,653	2.5	8,694	2.7
1,500.00–1,549.90	27,872	2.2	19,489	2.1	8,383	2.6
1,550.00–1,599.90	23,422	1.9	15,636	1.7	7,786	2.4
1,600.00–1,649.90	20,408	1.6	12,786	1.4	7,622	2.3
1,650.00–1,699.90	16,885	1.4	10,077	1.1	6,808	2.1
1,700.00–1,749.90	14,653	1.2	8,316	0.9	6,337	1.9
1,750.00–1,799.90	12,229	1.0	6,474	0.7	5,755	1.8
1,800.00–1,849.90	11,505	0.9	5,355	0.6	6,150	1.9
1,850.00–1,899.90	11,574	0.9	3,912	0.4	7,662	2.3
1,900.00–1,949.90	9,660	0.8	2,907	0.3	6,753	2.1
1,950.00–1,999.90	7,847	0.6	2,135	0.2	5,712	1.7
2,000.00–2,049.90	6,710	0.5	1,739	0.2	4,971	1.5
2,050.00–2,099.90	5,232	0.4	1,171	0.1	4,061	1.2
2,100.00 or more	17,627	1.4	1,648	0.2	15,979	4.9
Average benefit (dollars)	996.00		919.60		1,211.70	

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

NOTES: Benefits awarded before the December cost-of-living increase are converted to the December rates before percentages are computed.

Totals do not necessarily equal the sum of rounded components.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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, 2010

Sex and primary insurance amount (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	2,634,439	100.0	1,889,014	100.0	745,425	100.0
Less than 500.00	216,646	8.2	163,641	8.7	53,005	7.1
500.00–549.90	32,974	1.3	24,903	1.3	8,071	1.1
550.00–599.90	35,304	1.3	24,601	1.3	10,703	1.4
600.00–649.90	36,558	1.4	23,997	1.3	12,561	1.7
650.00–699.90	58,863	2.2	40,425	2.1	18,438	2.5
700.00–749.90	79,906	3.0	59,946	3.2	19,960	2.7
750.00–799.90	78,385	3.0	58,644	3.1	19,741	2.6
800.00–849.90	77,247	2.9	56,996	3.0	20,251	2.7
850.00–899.90	75,554	2.9	55,517	2.9	20,037	2.7
900.00–949.90	74,918	2.8	54,466	2.9	20,452	2.7
950.00–999.90	73,993	2.8	53,812	2.8	20,181	2.7
1,000.00–1,049.90	72,624	2.8	52,307	2.8	20,317	2.7
1,050.00–1,099.90	72,844	2.8	52,720	2.8	20,124	2.7
1,100.00–1,149.90	71,348	2.7	51,436	2.7	19,912	2.7
1,150.00–1,199.90	70,386	2.7	50,684	2.7	19,702	2.6
1,200.00–1,249.90	69,589	2.6	50,066	2.7	19,523	2.6
1,250.00–1,299.90	68,418	2.6	49,531	2.6	18,887	2.5
1,300.00–1,349.90	66,930	2.5	47,974	2.5	18,956	2.5
1,350.00–1,399.90	65,759	2.5	47,725	2.5	18,034	2.4
1,400.00–1,449.90	64,333	2.4	46,441	2.5	17,892	2.4
1,450.00–1,499.90	63,414	2.4	45,792	2.4	17,622	2.4
1,500.00–1,549.90	61,923	2.4	44,690	2.4	17,233	2.3
1,550.00–1,599.90	60,987	2.3	43,511	2.3	17,476	2.3
1,600.00–1,649.90	59,680	2.3	42,054	2.2	17,626	2.4
1,650.00–1,699.90	57,385	2.2	40,972	2.2	16,413	2.2
1,700.00–1,749.90	55,540	2.1	39,573	2.1	15,967	2.1
1,750.00–1,799.90	53,953	2.0	38,596	2.0	15,357	2.1
1,800.00–1,849.90	55,470	2.1	37,923	2.0	17,547	2.4
1,850.00–1,899.90	74,935	2.8	50,494	2.7	24,441	3.3
1,900.00–1,949.90	89,417	3.4	66,157	3.5	23,260	3.1
1,950.00–1,999.90	84,262	3.2	63,415	3.4	20,847	2.8
2,000.00–2,049.90	76,045	2.9	56,474	3.0	19,571	2.6
2,050.00–2,099.90	68,902	2.6	50,763	2.7	18,139	2.4
2,100.00 or more	309,947	11.8	202,768	10.7	107,179	14.4
Average primary insurance amount (dollars)	1,350.60		1,336.20		1,387.20	

(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, 2010—Continued

Sex and primary insurance amount (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Men	1,386,514	100.0	967,655	100.0	418,859	100.0
Less than 500.00	78,365	5.7	57,329	5.9	21,036	5.0
500.00–549.90	10,841	0.8	8,030	0.8	2,811	0.7
550.00–599.90	11,110	0.8	7,855	0.8	3,255	0.8
600.00–649.90	11,224	0.8	7,490	0.8	3,734	0.9
650.00–699.90	17,506	1.3	11,924	1.2	5,582	1.3
700.00–749.90	23,296	1.7	17,072	1.8	6,224	1.5
750.00–799.90	23,351	1.7	16,887	1.7	6,464	1.5
800.00–849.90	23,255	1.7	16,439	1.7	6,816	1.6
850.00–899.90	23,436	1.7	16,535	1.7	6,901	1.6
900.00–949.90	23,632	1.7	16,400	1.7	7,232	1.7
950.00–999.90	24,362	1.8	16,909	1.7	7,453	1.8
1,000.00–1,049.90	24,642	1.8	16,922	1.7	7,720	1.8
1,050.00–1,099.90	26,203	1.9	18,129	1.9	8,074	1.9
1,100.00–1,149.90	26,841	1.9	18,684	1.9	8,157	1.9
1,150.00–1,199.90	27,692	2.0	19,156	2.0	8,536	2.0
1,200.00–1,249.90	28,951	2.1	20,161	2.1	8,790	2.1
1,250.00–1,299.90	29,885	2.2	21,044	2.2	8,841	2.1
1,300.00–1,349.90	31,122	2.2	21,805	2.3	9,317	2.2
1,350.00–1,399.90	32,115	2.3	22,829	2.4	9,286	2.2
1,400.00–1,449.90	33,209	2.4	23,591	2.4	9,618	2.3
1,450.00–1,499.90	34,482	2.5	24,446	2.5	10,036	2.4
1,500.00–1,549.90	34,715	2.5	24,563	2.5	10,152	2.4
1,550.00–1,599.90	35,940	2.6	24,991	2.6	10,949	2.6
1,600.00–1,649.90	36,421	2.6	25,132	2.6	11,289	2.7
1,650.00–1,699.90	36,087	2.6	25,200	2.6	10,887	2.6
1,700.00–1,749.90	35,917	2.6	25,115	2.6	10,802	2.6
1,750.00–1,799.90	35,760	2.6	25,081	2.6	10,679	2.5
1,800.00–1,849.90	37,750	2.7	25,517	2.6	12,233	2.9
1,850.00–1,899.90	52,542	3.8	35,373	3.7	17,169	4.1
1,900.00–1,949.90	64,498	4.7	47,510	4.9	16,988	4.1
1,950.00–1,999.90	62,995	4.5	47,290	4.9	15,705	3.7
2,000.00–2,049.90	58,799	4.2	43,549	4.5	15,250	3.6
2,050.00–2,099.90	55,290	4.0	40,707	4.2	14,583	3.5
2,100.00 or more	274,280	19.8	177,990	18.4	96,290	23.0
Average primary insurance amount (dollars)	1,563.70		1,552.80		1,588.90	

(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, 2010—Continued

Sex and primary insurance amount (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	1,247,925	100.0	921,359	100.0	326,566	100.0
Less than 500.00	138,281	11.1	106,312	11.5	31,969	9.8
500.00–549.90	22,133	1.8	16,873	1.8	5,260	1.6
550.00–599.90	24,194	1.9	16,746	1.8	7,448	2.3
600.00–649.90	25,334	2.0	16,507	1.8	8,827	2.7
650.00–699.90	41,357	3.3	28,501	3.1	12,856	3.9
700.00–749.90	56,610	4.5	42,874	4.7	13,736	4.2
750.00–799.90	55,034	4.4	41,757	4.5	13,277	4.1
800.00–849.90	53,992	4.3	40,557	4.4	13,435	4.1
850.00–899.90	52,118	4.2	38,982	4.2	13,136	4.0
900.00–949.90	51,286	4.1	38,066	4.1	13,220	4.0
950.00–999.90	49,631	4.0	36,903	4.0	12,728	3.9
1,000.00–1,049.90	47,982	3.8	35,385	3.8	12,597	3.9
1,050.00–1,099.90	46,641	3.7	34,591	3.8	12,050	3.7
1,100.00–1,149.90	44,507	3.6	32,752	3.6	11,755	3.6
1,150.00–1,199.90	42,694	3.4	31,528	3.4	11,166	3.4
1,200.00–1,249.90	40,638	3.3	29,905	3.2	10,733	3.3
1,250.00–1,299.90	38,533	3.1	28,487	3.1	10,046	3.1
1,300.00–1,349.90	35,808	2.9	26,169	2.8	9,639	3.0
1,350.00–1,399.90	33,644	2.7	24,896	2.7	8,748	2.7
1,400.00–1,449.90	31,124	2.5	22,850	2.5	8,274	2.5
1,450.00–1,499.90	28,932	2.3	21,346	2.3	7,586	2.3
1,500.00–1,549.90	27,208	2.2	20,127	2.2	7,081	2.2
1,550.00–1,599.90	25,047	2.0	18,520	2.0	6,527	2.0
1,600.00–1,649.90	23,259	1.9	16,922	1.8	6,337	1.9
1,650.00–1,699.90	21,298	1.7	15,772	1.7	5,526	1.7
1,700.00–1,749.90	19,623	1.6	14,458	1.6	5,165	1.6
1,750.00–1,799.90	18,193	1.5	13,515	1.5	4,678	1.4
1,800.00–1,849.90	17,720	1.4	12,406	1.3	5,314	1.6
1,850.00–1,899.90	22,393	1.8	15,121	1.6	7,272	2.2
1,900.00–1,949.90	24,919	2.0	18,647	2.0	6,272	1.9
1,950.00–1,999.90	21,267	1.7	16,125	1.8	5,142	1.6
2,000.00–2,049.90	17,246	1.4	12,925	1.4	4,321	1.3
2,050.00–2,099.90	13,612	1.1	10,056	1.1	3,556	1.1
2,100.00 or more	35,667	2.9	24,778	2.7	10,889	3.3
Average primary insurance amount (dollars)	1,113.80		1,108.70		1,128.30	

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

NOTES: Primary insurance amounts awarded before the December cost-of-living increase are converted to the December rates before percentages are computed.

Totals do not necessarily equal the sum of rounded components.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B5—Number, average age, and percentage distribution, by sex and age, selected years 1940–2010

Year of award action ^a	Number (thousands)	Average age	Percentage distribution by age ^b										
			Total, all ages	62	63	64	65 to FRA ^c	FRA ^d			FRA to 69 ^e	70–74	75 or older
								Total	Newly entitled ^f	Disability conversions ^g			
Men													
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 ^h	904	63.7	100.0	50.5	6.6	9.7	...	26.9	14.9	12.0	4.7	1.3	0.2
1998	909	63.8	100.0	49.6	7.1	9.9	...	27.3	14.7	12.6	4.6	1.3	0.2
1999	940	63.7	100.0	49.3	7.3	9.8	...	27.4	14.8	12.6	4.7	1.3	0.2
2000	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	992	63.7	100.0	46.8	6.7	12.1	...	30.8	18.1	12.7	2.8	0.7	0.2
2002	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	969	63.6	100.0	49.5	6.9	13.2	3.7	23.3	11.7	11.6	2.7	0.5	0.1
2004	1,010	63.6	100.0	50.3	7.1	11.1	5.2	22.9	11.6	11.3	2.7	0.5	0.1
2005	1,061	63.6	100.0	50.2	7.2	9.6	7.2	22.4	11.2	11.2	2.7	0.5	0.2
2006	1,057	63.8	100.0	45.6	7.7	9.2	9.7	23.9	11.8	12.1	3.1	0.7	0.2
2007	1,075	64.0	100.0	42.4	7.4	9.3	12.1	24.6	12.0	12.1	3.2	0.7	0.2
2008	1,200	64.0	100.0	42.5	7.0	8.4	13.4	24.7	12.4	12.3	3.2	0.6	0.2
2009	1,452	64.0	100.0	44.3	7.2	7.4	11.7	25.3	12.7	12.6	3.4	0.6	0.1
2010	1,387	64.1	100.0	42.6	8.3	6.9	10.6	26.6	13.5	13.0	4.1	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 1940–2010—Continued

Year of award action ^a	Number (thousands)	Average age	Percentage distribution by age ^b										
			Total, all ages	62	63	64	65 to FRA ^c	FRA ^d			FRA to 69 ^e	70–74	75 or older
								Total	Newly entitled ^f	Disability conversions ^g			
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 ^h	809	65.4	100.0	48.2	5.5	7.5	...	19.5	10.5	8.9	4.4	6.4	8.5
1998	733	64.0	100.0	53.1	7.0	8.9	...	22.0	12.4	9.6	4.1	2.4	2.5
1999	737	63.6	100.0	55.1	6.8	9.2	...	22.6	12.5	10.1	3.8	1.8	0.7
2000	854	63.8	100.0	52.2	5.9	9.3	...	23.6	13.9	9.7	6.5	2.2	0.4
2001	795	63.7	100.0	51.3	7.1	11.5	...	23.7	12.8	10.9	3.1	2.6	0.6
2002	811	63.6	100.0	52.9	6.6	12.2	...	23.9	12.7	11.2	2.3	1.8	0.3
2003	822	63.6	100.0	54.3	6.4	12.2	3.1	18.0	7.8	10.2	3.7	1.9	0.4
2004	874	63.6	100.0	55.0	6.7	10.6	4.5	17.6	7.5	10.1	3.8	1.6	0.3
2005	939	63.6	100.0	54.3	6.9	9.5	6.2	17.1	7.4	9.7	3.8	1.8	0.3
2006	942	63.8	100.0	50.2	7.5	9.4	8.4	18.2	7.7	10.5	4.0	2.0	0.4
2007	961	63.9	100.0	47.6	7.3	10.0	10.6	18.9	7.8	11.1	3.7	1.6	0.2
2008	1,079	63.9	100.0	48.3	6.9	9.0	11.6	18.9	7.7	11.2	3.2	1.5	0.7
2009	1,288	63.9	100.0	49.8	6.5	7.2	10.2	20.5	8.6	11.9	3.9	1.5	0.5
2010	1,248	63.9	100.0	47.9	8.1	7.0	9.8	21.6	9.3	12.2	3.8	1.6	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.

NOTES: Percentage distributions for 2003–2009 differ slightly from those in prior editions of this table because of changes in the methodology of calculating age (see footnote b) and in the presentation of legislated FRA (see footnotes c–g).

Totals do not necessarily equal the sum of rounded components.

... = not applicable; FRA = full retirement age.

- a. Reflects the date the award action was posted on the Master Beneficiary Record. Entitlement can be retroactive and thus precede the date of award. For data by year of entitlement, see table 6.B5.1.
- b. Age on birthday in year of award for 1940–1980. Age in month of award for 1985–2002. Age in month of entitlement for 2003 and later. (In previous editions of this table, the transition from age in month of award to age in month of entitlement did not take effect until 2006.)
- c. Workers entitled in the period between attainment of age 65 and the month prior to attaining FRA.
- d. FRA is 65 for workers attaining age 65 before 2003, and increases by 2 months per year for workers attaining age 65 in a year after 2002, until it becomes 66 for workers attaining age 65 between 2008 and 2019.
- e. For 1940–2002, includes workers entitled in the period between attainment of age 66 and the month prior to attaining age 70. Beginning with 2003, includes workers entitled in the period between the month after attaining FRA and the month prior to attaining age 70.
- f. For 1940–2002, includes workers entitled in the period between attainment of age 65 and the month prior to attaining age 66. Beginning with 2003, includes workers entitled only in the month they attain FRA.
- g. Disabled worker benefit automatically converts to a retired worker benefit in the month the worker attains FRA.
- h. In response to a March 1997 audit by the Social Security Administration (SSA) Office of the Inspector General, notifications of eligibility for higher benefits were mailed to approximately 200,000 surviving spouses, resulting in higher numbers for 1997. SSA subsequently initiated the Widow(er)'s Insurance Benefits/Retirement Insurance Benefits (WIB/RIB) outreach program to identify and notify surviving spouses who are eligible for higher retirement benefits at FRA and age 70.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

6.B OASDI Benefits Awarded: Retired Workers

Table 6.B5.1—Number, average age, and percentage distribution, by sex and age at entitlement, 1998–2010

Year of entitlement	Number (thousands)	Average age	Percentage distribution by age at month of entitlement											
			Total, all ages	62	63	64	65 ^a			66 ^a		Disability conversions ^b	67–69	70 or older
							Before FRA	At FRA	After FRA	At FRA	After FRA			
Men														
1998	902	63.4	100.0	50.8	6.7	10.6	...	12.1	2.5	...	1.4	12.7	2.1	1.1
1999	964	63.5	100.0	49.0	6.8	10.8	...	12.3	3.2	...	1.8	12.3	2.7	1.2
2000	1,092	63.7	100.0	44.8	6.1	9.7	...	15.4	4.5	...	2.8	11.6	4.2	0.8
2001	977	63.4	100.0	48.3	6.6	12.3	...	16.2	1.3	...	0.7	12.9	1.1	0.7
2002	998	63.4	100.0	47.7	6.8	13.6	...	15.8	1.2	...	0.6	12.6	0.9	0.6
2003	973	63.3	100.0	49.6	6.9	13.1	3.8	11.7	1.2	...	0.6	11.6	0.9	0.6
2004	1,012	63.3	100.0	50.3	7.2	11.1	5.3	11.5	1.1	...	0.7	11.3	0.9	0.7
2005	1,058	63.4	100.0	49.6	7.1	9.5	7.3	11.2	1.0	...	0.9	11.2	1.2	1.0
2006	1,042	63.5	100.0	45.7	7.8	9.3	9.9	11.4	0.8	...	1.0	12.3	1.1	0.8
2007	1,069	63.6	100.0	42.6	7.5	9.4	12.2	12.1	0.6	...	1.4	12.2	1.3	0.8
2008	1,190	63.6	100.0	42.6	7.1	8.4	13.5	12.0	0.3	...	1.7	12.4	1.3	0.7
2009	1,453	63.8	100.0	44.0	7.2	7.3	11.7	...	...	13.0	1.9	12.6	1.5	0.7
2010	1,329	63.8	100.0	43.6	8.3	6.9	10.9	...	...	13.3	1.6	13.6	1.3	0.6
Women														
1998	727	63.5	100.0	55.9	6.0	9.6	...	9.7	1.9	...	1.2	9.7	2.6	3.4
1999	755	63.3	100.0	55.4	6.2	10.0	...	10.3	2.2	...	1.4	9.9	2.5	2.1
2000	837	63.5	100.0	52.7	6.0	9.5	...	11.5	3.1	...	1.8	9.9	3.3	2.1
2001	785	63.3	100.0	54.6	6.1	11.4	...	11.4	1.1	...	0.7	11.0	1.8	1.8
2002	817	63.4	100.0	53.3	6.2	12.5	...	11.2	1.2	...	0.6	11.1	1.6	2.2
2003	823	63.3	100.0	54.5	6.5	12.3	3.2	7.8	1.1	...	0.7	10.2	1.8	2.0
2004	879	63.3	100.0	54.9	6.7	10.6	4.5	7.5	1.0	...	0.8	10.0	2.0	1.9
2005	939	63.4	100.0	54.1	6.8	9.5	6.2	7.5	0.8	...	0.9	9.7	2.1	2.3
2006	938	63.5	100.0	50.4	7.6	9.5	8.5	7.6	0.7	...	1.0	10.5	2.2	2.0
2007	964	63.6	100.0	47.5	7.3	10.0	10.6	7.6	0.5	...	1.2	11.1	2.0	2.2
2008	1,077	63.6	100.0	48.0	6.8	8.8	11.6	7.4	0.2	...	1.6	11.2	1.9	2.4
2009	1,279	63.7	100.0	49.9	6.5	7.2	10.2	...	...	8.9	1.6	12.0	2.0	1.6
2010	1,200	63.7	100.0	49.0	8.2	7.0	10.0	...	...	9.0	1.3	12.7	1.5	1.3

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

NOTES: The data in this table differ from those in table 6.B5 because awards are summarized here by the year in which entitlement began rather than by the year the award action was posted on the Master Beneficiary Record. The year of entitlement often precedes the year of action because of retroactive entitlements, delayed award actions, and other reasons. Because entitlements can be awarded retroactively, data for current and prior years are subject to revision with each annual update of this table.

Totals do not necessarily equal the sum of rounded components.

... = not applicable; FRA = full retirement age.

a. FRA is 65 for workers attaining age 65 before 2003, and increases by 2 months per year for workers attaining age 65 in a year after 2002, until it becomes 66 for workers attaining age 65 between 2008 and 2019.

b. Disabled worker benefit automatically converts to a retired worker benefit in the month the worker attains FRA.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C1—Number and percentage distribution, by monthly benefit and sex, 2010

Monthly benefit (dollars)	Total		Men		Women	
	Number	Percent	Number	Percent	Number	Percent
All disabled workers	1,026,988	100.0	555,999	100.0	470,989	100.0
Less than 100.00	3,307	0.3	1,693	0.3	1,614	0.3
100.00–149.90	1,839	0.2	815	0.1	1,024	0.2
150.00–199.90	4,054	0.4	1,466	0.3	2,588	0.5
200.00–249.90	7,965	0.8	2,913	0.5	5,052	1.1
250.00–299.90	11,566	1.1	4,284	0.8	7,282	1.5
300.00–349.90	13,627	1.3	5,052	0.9	8,575	1.8
350.00–399.90	15,140	1.5	5,621	1.0	9,519	2.0
400.00–449.90	16,096	1.6	5,875	1.1	10,221	2.2
450.00–499.90	16,969	1.7	6,243	1.1	10,726	2.3
500.00–549.90	17,704	1.7	6,505	1.2	11,199	2.4
550.00–599.90	18,221	1.8	6,734	1.2	11,487	2.4
600.00–649.90	19,251	1.9	7,033	1.3	12,218	2.6
650.00–699.90	37,144	3.6	13,458	2.4	23,686	5.0
700.00–749.90	50,262	4.9	18,962	3.4	31,300	6.6
750.00–799.90	50,332	4.9	19,877	3.6	30,455	6.5
800.00–849.90	48,974	4.8	20,559	3.7	28,415	6.0
850.00–899.90	47,685	4.6	20,959	3.8	26,726	5.7
900.00–949.90	46,365	4.5	21,349	3.8	25,016	5.3
950.00–999.90	44,319	4.3	21,418	3.9	22,901	4.9
1,000.00–1,049.90	42,016	4.1	21,343	3.8	20,673	4.4
1,050.00–1,099.90	39,905	3.9	20,874	3.8	19,031	4.0
1,100.00–1,149.90	37,911	3.7	20,531	3.7	17,380	3.7
1,150.00–1,199.90	35,313	3.4	19,858	3.6	15,455	3.3
1,200.00–1,249.90	33,274	3.2	19,323	3.5	13,951	3.0
1,250.00–1,299.90	31,163	3.0	18,767	3.4	12,396	2.6
1,300.00–1,349.90	28,634	2.8	17,961	3.2	10,673	2.3
1,350.00–1,399.90	26,504	2.6	17,031	3.1	9,473	2.0
1,400.00–1,449.90	24,789	2.4	16,445	3.0	8,344	1.8
1,450.00–1,499.90	22,933	2.2	15,428	2.8	7,505	1.6
1,500.00–1,549.90	20,913	2.0	14,351	2.6	6,562	1.4
1,550.00–1,599.90	19,268	1.9	13,517	2.4	5,751	1.2
1,600.00–1,649.90	17,875	1.7	12,662	2.3	5,213	1.1
1,650.00–1,699.90	16,342	1.6	11,788	2.1	4,554	1.0
1,700.00–1,749.90	15,010	1.5	10,889	2.0	4,121	0.9
1,750.00–1,799.90	13,910	1.4	10,247	1.8	3,663	0.8
1,800.00–1,849.90	13,326	1.3	10,009	1.8	3,317	0.7
1,850.00–1,899.90	17,341	1.7	13,042	2.3	4,299	0.9
1,900.00–1,949.90	19,534	1.9	15,118	2.7	4,416	0.9
1,950.00–1,999.90	16,409	1.6	12,888	2.3	3,521	0.7
2,000.00–2,049.90	13,674	1.3	10,900	2.0	2,774	0.6
2,050.00–2,099.90	11,005	1.1	8,906	1.6	2,099	0.4
2,100.00 or more	39,119	3.8	33,305	6.0	5,814	1.2
Average benefit (dollars)	1,128.90		1,261.90		971.80	

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

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

Benefits awarded before the December cost-of-living increase are converted to the December rates before percentages are computed.

Effective 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C2—Number, average age, and percentage distribution, by sex and age, selected years 1957–2010

Year	Number	Average age	Percentage distribution, by age									
			Total, all ages	Under 30	30–39	40–44	45–49	50–54	55–59	60–61	62–64	65 ^a
<i>Men</i>												
1957	148,376	59.2	100.0	...	...	...	...	17.1	28.0	17.0	33.8	4.1
1958	107,003	59.0	100.0	...	...	...	...	19.7	27.5	15.2	28.9	8.7
1959	146,547	58.9	100.0	...	...	...	...	21.1	27.4	14.8	28.8	7.8
1960	168,466	54.5	100.0	0.8	7.0	6.5	10.5	16.7	20.0	11.8	21.3	5.4
1965	186,808	53.0	100.0	1.8	8.2	7.9	11.1	17.1	25.7	14.0	13.0	1.0
1970	258,072	52.1	100.0	6.7	7.6	6.5	10.1	14.7	23.5	12.3	16.1	2.6
1975	408,531	51.5	100.0	7.7	8.6	6.2	9.5	15.7	23.1	12.1	14.6	2.5
1980	275,185	51.2	100.0	8.3	9.7	6.0	8.4	14.7	24.6	12.3	14.2	1.8
1981	244,984	50.8	100.0	8.6	10.2	6.2	8.4	14.5	24.3	13.0	13.1	1.7
1982	207,453	50.9	100.0	8.4	10.4	6.3	8.4	14.1	24.6	12.9	13.6	1.2
1983	217,422	50.2	100.0	9.5	11.7	6.6	8.4	13.6	23.4	12.2	13.3	1.3
1984	247,833	50.0	100.0	9.2	12.8	7.1	8.7	13.4	22.6	12.2	12.7	1.3
1985	274,400	50.1	100.0	8.7	13.3	7.0	9.9	14.6	23.1	12.4	10.6	0.3
1986	273,700	48.7	100.0	10.7	15.3	8.1	9.4	14.3	21.3	11.1	9.5	0.3
1987	265,900	49.0	100.0	9.4	16.0	8.6	9.3	13.9	20.8	10.9	11.0	0.2
1988	265,700	49.2	100.0	8.4	16.0	9.7	9.0	14.6	21.3	10.5	10.2	0.2
1989	268,600	49.0	100.0	8.7	16.0	9.5	10.2	14.2	20.6	9.7	10.8	0.3
1990	293,300	48.1	100.0	10.9	16.9	9.4	9.5	13.5	20.5	10.3	8.8	0.1
1991	322,700	47.9	100.0	9.5	17.7	10.6	11.0	14.1	18.4	9.4	9.1	0.2
1992	395,600	47.8	100.0	9.5	18.5	10.8	11.0	13.0	18.6	9.8	8.7	0.2
1993	391,800	47.7	100.0	9.2	18.9	10.1	11.7	14.7	18.8	8.6	7.8	0.2
1994	379,300	48.4	100.0	6.8	18.4	10.8	12.7	15.4	19.3	9.0	7.6	0.1
1995	368,400	48.9	100.0	7.2	16.3	10.7	11.5	15.7	20.4	8.9	9.1	0.2
1996	347,100	48.7	100.0	6.9	16.2	10.8	13.2	16.2	19.9	9.3	7.5	0.1
1997	311,100	49.3	100.0	6.3	14.6	10.8	13.5	16.1	21.6	8.8	8.2	0.1
1998	331,400	49.2	100.0	6.3	14.3	11.1	12.4	18.3	21.6	8.1	7.8	0.2
1999	338,900	49.6	100.0	6.2	13.1	11.4	12.4	18.3	21.7	8.8	8.0	0.3
2000	329,800	49.6	100.0	6.8	12.9	10.7	12.7	17.7	21.0	9.1	8.8	0.2
2001	364,500	49.4	100.0	7.5	13.2	9.9	12.2	17.4	22.6	9.2	7.9	0.1
2002	406,336	49.4	100.0	7.8	12.0	10.3	12.7	17.5	22.5	9.2	7.9	0.1
2003	421,598	49.7	100.0	7.0	11.8	10.2	12.8	17.6	22.8	9.6	7.9	0.3
2004	428,672	50.0	100.0	6.8	11.3	9.9	12.8	17.6	23.4	9.6	8.2	0.4
2005	444,312	50.2	100.0	6.6	10.8	9.8	13.0	17.8	23.5	8.8	8.9	0.7
2006	425,285	48.4	100.0	8.2	11.2	10.1	13.1	18.2	23.6	8.4	6.8	0.4
2007	428,836	49.1	100.0	8.2	10.7	9.7	12.8	18.3	23.7	8.9	7.2	0.5
2008	466,966	49.2	100.0	8.4	10.3	9.3	12.7	18.6	23.4	9.5	7.0	0.7
2009	521,424	49.2	100.0	8.5	10.3	8.9	12.5	19.1	23.6	9.3	7.0	0.7
2010	555,999	49.5	100.0	7.8	10.0	8.6	12.4	19.5	24.2	9.4	7.4	0.7

(Continued)

6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C2—Number, average age, and percentage distribution, by sex and age, selected years 1957–2010—Continued

Year	Number	Average age	Percentage distribution, by age									
			Total, all ages	Under 30	30–39	40–44	45–49	50–54	55–59	60–61	62–64	65 ^a
<i>Women</i>												
1957	30,426	57.4	100.0	...	...	...	...	25.5	38.9	19.8	15.3	0.5
1958	24,379	57.2	100.0	...	...	...	...	28.6	37.2	17.8	15.2	1.2
1959	31,264	57.0	100.0	...	...	...	...	30.2	36.9	17.6	14.2	1.1
1960	39,339	52.5	100.0	0.7	8.1	8.0	13.3	21.9	24.6	12.4	10.1	0.8
1965	66,691	53.2	100.0	1.1	6.5	7.4	11.7	19.3	28.3	14.1	10.9	0.6
1970	92,312	52.8	100.0	4.2	6.3	6.1	11.0	17.5	27.2	13.0	12.9	1.7
1975	183,518	52.1	100.0	6.1	7.3	6.1	10.1	17.7	25.5	12.2	12.9	2.1
1980	121,374	51.1	100.0	7.4	9.7	6.4	9.3	16.3	25.5	11.7	12.2	1.5
1981	106,863	50.8	100.0	7.8	10.2	6.5	9.5	16.4	25.1	12.0	11.1	1.4
1982	89,678	50.5	100.0	8.0	10.9	6.8	9.5	15.6	24.9	11.7	11.4	1.1
1983	94,127	49.8	100.0	9.0	12.2	7.4	9.5	14.8	23.5	10.9	11.6	1.1
1984	114,165	49.7	100.0	8.3	13.2	7.9	9.7	14.9	22.8	10.9	11.7	1.2
1985	134,500	49.7	100.0	8.6	12.9	8.0	10.6	15.8	23.3	10.1	10.5	0.1
1986	135,700	48.8	100.0	9.0	15.5	10.4	10.5	14.8	21.3	9.6	8.6	0.2
1987	143,700	49.5	100.0	7.5	15.2	8.1	11.2	15.8	23.4	9.6	8.8	0.3
1988	147,000	49.3	100.0	8.5	14.0	8.8	10.9	16.1	23.5	10.5	7.4	0.3
1989	146,900	49.1	100.0	7.8	14.8	10.4	11.9	13.8	21.2	10.8	8.9	0.3
1990	168,500	48.4	100.0	8.5	16.3	9.8	13.1	14.2	22.3	8.9	6.5	0.4
1991	190,400	48.4	100.0	8.5	16.8	10.1	12.2	16.2	19.5	8.9	7.4	0.4
1992	241,300	47.7	100.0	8.6	17.7	12.0	12.4	15.6	17.6	8.4	7.5	0.2
1993	237,900	48.1	100.0	7.5	17.5	11.2	13.1	16.5	19.7	6.8	7.4	0.2
1994	234,000	48.2	100.0	7.4	16.9	11.1	12.9	17.0	20.8	7.3	6.4	0.2
1995	263,200	48.5	100.0	6.4	16.7	11.4	13.8	17.2	20.5	7.6	6.3	0.1
1996	256,900	49.1	100.0	5.3	15.1	11.3	14.0	19.0	21.2	8.3	5.8	0.1
1997	250,200	48.4	100.0	6.2	16.3	12.2	14.1	19.0	19.0	6.8	6.2	0.2
1998	271,900	48.9	100.0	5.4	14.9	12.2	14.5	19.1	20.4	7.6	5.7	0.2
1999	266,900	48.7	100.0	5.7	14.6	12.5	15.3	18.2	20.6	6.6	6.2	0.3
2000	282,400	49.2	100.0	5.8	13.7	12.3	13.5	18.7	21.6	8.1	6.1	0.2
2001	304,800	48.4	100.0	7.9	14.0	12.1	13.8	18.5	20.1	7.6	5.9	0.1
2002	343,667	48.7	100.0	7.3	13.4	11.6	14.3	18.4	21.0	7.7	6.3	0.1
2003	355,863	49.0	100.0	6.8	13.2	11.4	14.2	18.4	21.5	8.0	6.3	0.2
2004	367,103	49.7	100.0	6.5	12.6	11.1	14.1	18.5	21.9	8.1	6.7	0.4
2005	385,375	49.6	100.0	6.2	12.2	10.9	14.1	18.9	22.2	7.6	7.4	0.5
2006	373,390	48.1	100.0	7.6	12.9	11.4	14.6	19.2	21.8	7.1	5.2	0.3
2007	375,951	48.4	100.0	7.5	12.3	11.1	14.4	19.4	22.0	7.4	5.6	0.3
2008	410,260	48.4	100.0	7.6	12.2	10.7	14.2	19.9	21.7	7.8	5.4	0.5
2009	449,272	48.4	100.0	7.8	12.1	10.3	14.3	20.4	21.8	7.7	5.3	0.4
2010	470,989	48.8	100.0	7.3	11.9	9.8	13.9	20.6	22.2	7.8	5.9	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.

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

Beginning with 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

Age in year of award for 1957–1984. Age in month of award for 1985 and later. Beginning with 2006, age is based on date of entitlement and not date of award. Entitlement can be retroactive and thus precede the date of award.

... = not applicable.

a. Includes awards processed after attainment of age 65.

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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, 1965–2010

Year	Number (thousands)		Awards as a percentage of applications	Awards per 1,000 insured workers
	Applications	Awards		
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	5.5
1972	947.5	455.4	48.1	5.9
1973	1,067.5	491.6	46.1	6.2
1974	1,330.2	536.0	40.3	6.6
1975	1,285.3	592.0	46.1	7.0
1976	1,232.2	551.5	44.8	6.4
1977	1,235.2	568.9	46.1	6.5
1978	1,184.7	490.8	41.4	5.5
1979	1,187.8	440.5	37.1	4.7
1980	1,262.3	420.3	33.3	4.3
1981	1,161.2	381.0	32.8	3.8
1982	1,019.8	336.1	33.0	3.3
1983	1,019.3	428.5	42.0	4.1
1984	1,036.7	410.0	39.5	3.9
1985	1,066.2	416.1	39.0	3.9
1986	1,118.4	424.9	38.0	3.9
1987	1,108.9	420.3	37.9	3.8
1988	1,017.9	415.3	40.8	3.7
1989	984.9	430.7	43.7	3.7
1990	1,067.7	472.1	44.2	4.0
1991	1,208.7	540.8	44.7	4.5
1992	1,335.1	642.1	48.1	5.3
1993	1,425.8	637.4	44.7	5.2
1994	1,443.8	631.9	43.8	5.1
1995	1,338.1	645.6	48.3	5.2
1996	1,279.2	624.3	48.8	4.9
1997	1,180.2	587.7	49.8	4.6
1998	1,169.3	608.4	52.0	4.6
1999	1,200.1	620.6	51.7	4.7
2000	1,330.6	621.3	46.7	4.6
2001	1,498.6	690.5	46.1	5.0
2002	1,682.5	750.0	44.6	5.4
2003	1,895.5	777.5	41.0	5.5
2004	2,137.5	795.8	37.2	5.6
2005	2,122.1	829.7	39.1	5.8
2006	2,134.1	803.8	37.7	5.5
2007	2,190.2	818.5	37.4	5.6
2008	2,320.4	890.4	38.4	6.0
2009	2,816.2	984.5	35.0	6.6
2010	2,935.8	1,049.3	35.7	7.0

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

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6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D1—Number of wives and husbands, by type of benefit, selected years 1950–2010

Year	Total	Wives with entitlement based on—		Husbands
		Care of children	Age	
<i>Wives and husbands of retired workers</i>				
1950	162,768	9,646	152,310	812
1955	288,915	21,692	263,816	3,407
1960	339,987	32,254	305,713	2,020
1965	321,015	44,087	275,717	1,211
1970	339,447	51,378	286,867	1,202
1975	350,558	60,184	289,600	774
1980	360,693	55,401	294,892	10,400
1981	338,540	50,993	277,641	9,906
1982	349,967	36,229	302,739	10,999
1983	356,274	35,309	308,922	12,043
1984	342,691	30,972	298,855	12,864
1985	356,558	30,454	312,849	13,255
1986	358,115	28,925	315,427	13,763
1987	333,333	26,099	294,499	12,735
1988	316,929	23,045	281,760	12,124
1989	310,498	21,285	278,655	10,558
1990	308,980	21,395	277,238	10,347
1991	307,000	21,154	276,236	9,610
1992	304,764	21,057	274,670	9,037
1993	290,728	19,945	262,240	8,543
1994	275,025	18,431	248,430	8,164
1995	258,740	17,214	233,731	7,795
1996	244,014	15,466	221,059	7,489
1997	268,012	14,040	246,229	7,743
1998	263,668	13,472	242,390	7,806
1999	275,568	13,521	253,559	8,488
2000	341,503	15,625	315,148	10,730
2001	314,547	13,743	289,757	11,047
2002	317,685	14,011	291,377	12,297
2003	305,831	12,832	280,883	12,116
2004	319,430	12,219	294,133	13,078
2005	329,225	11,630	303,976	13,619
2006	328,430	11,160	301,614	15,656
2007	316,782	10,471	291,985	14,326
2008	344,003	11,283	316,119	16,601
2009	375,123	12,530	343,296	19,297
2010	354,947	11,710	321,826	21,411

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D1—Number of wives and husbands, by type of benefit, selected years 1950–2010—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
2004	48,016	19,423	26,070	2,523
2005	50,187	18,877	28,679	2,631
2006	49,521	16,837	30,270	2,414
2007	47,583	15,529	29,539	2,515
2008	50,756	15,899	32,033	2,824
2009	54,112	16,963	33,980	3,169
2010	53,987	17,445	32,960	3,582

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

NOTES: Benefits not necessarily payable at time of award.

Beginning with 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

a. January–November.

b. Includes December 1958.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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, and sex, 2010

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	383,941	419.60	333,536	438.50	50,405	294.10	24,993	342.00
By age								
By basis of entitlement								
Care of children	29,155	329.30	11,710	497.10	17,445	216.70	1,274	179.30
Under 35	6,616	185.10	708	421.10	5,908	156.90	300	126.80
35–39	4,243	246.20	848	440.80	3,395	197.60	221	144.50
40–44	4,631	299.70	1,351	462.70	3,280	232.60	246	173.60
45–49	4,673	369.60	2,069	494.90	2,604	270.00	216	189.40
50–54	3,760	438.00	2,330	522.90	1,430	299.70	145	211.80
55–59	2,669	501.90	2,104	543.20	565	348.70	83	280.50
60–61	1,137	548.20	1,008	570.50	129	372.10	33	325.90
62–64	1,426	425.10	1,292	436.50	134	315.30	30	337.10
Age	354,786	427.00	321,826	436.40	32,960	335.10	23,719	350.70
62–64	235,833	382.20	206,740	390.20	29,093	325.40	7,549	276.20
62	144,830	366.10	121,179	375.90	23,651	315.80	3,329	235.80
63	44,566	369.30	41,422	371.60	3,144	338.90	1,733	257.30
64	46,437	444.90	44,139	447.00	2,298	405.80	2,487	343.50
65–69	106,413	530.80	103,071	534.80	3,342	408.90	11,212	426.00
65	39,057	450.40	37,582	452.60	1,475	392.10	2,523	345.40
66	46,386	632.30	45,327	636.70	1,059	444.60	4,476	520.40
67	10,536	475.40	10,168	478.30	368	395.90	1,827	394.80
68	6,155	443.00	5,908	445.50	247	384.50	1,346	377.10
69	4,279	427.90	4,086	429.40	193	397.00	1,040	333.30
70–74	9,279	388.20	8,870	387.10	409	410.70	3,040	294.60
75 or older	3,261	385.70	3,145	386.50	116	361.60	1,918	292.90
By sex								
Wives								
Not divorced	336,203	417.80	290,228	437.90	45,975	291.30	...	...
Divorced	47,738	431.70	43,308	442.80	4,430	323.30	...	...
Husbands of—								
Retired workers	...	...	...	...	...	...	21,411	360.40
Disabled workers	...	...	...	...	...	...	3,582	231.90

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

NOTES: Effective 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

Effective 2006, age is based on date of entitlement and not date of award. Entitlement can be retroactive and thus precede the date of award.

... = not applicable.

a. Benefits awarded before the December cost-of-living increase are converted to the December rates before averages are computed.

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6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2010

Year	All children	Children of—		
		Retired workers	Deceased workers	Disabled workers
		<i>Total</i>		
1957	313,163	81,842	231,321	...
1960	415,719	69,979	241,430	104,310
1965	783,202	134,187	451,399	197,616
1970	1,090,865	182,595	591,724	316,546
1975	1,331,913	225,579	591,118	515,216
1976	1,327,197	236,805	578,905	511,487
1977	1,365,513	259,447	587,589	518,477
1978	1,234,658	214,284	566,992	453,382
1979	1,191,521	247,800	544,549	399,172
1980	1,174,112	248,658	540,246	385,208
1981	1,086,547	211,406	535,487	339,654
1982	916,715	182,849	473,396	260,470
1983	752,839	144,945	380,992	226,895
1984	721,564	131,986	351,326	238,252
1985	713,632	128,076	332,531	253,025
1986	700,627	122,652	319,800	258,167
1987	685,299	117,984	310,573	256,742
1988	706,031	116,659	324,346	265,026
1989	675,362	106,491	307,484	261,387
1990	695,307	108,105	303,616	283,586
1991	726,908	107,261	301,459	318,188
1992	794,571	108,686	304,300	381,585
1993	816,454	106,566	311,290	398,598
1994	824,239	102,983	310,051	411,205
1995	808,578	101,239	306,044	401,295
1996	798,485	98,655	302,480	397,350
1997	757,346	97,594	297,204	362,548
1998	763,170	96,893	294,851	371,426
1999	773,166	99,826	295,196	378,144
2000	776,676	115,358	297,686	363,632
2001	796,174	110,680	302,445	383,049
2002	846,361	116,186	310,395	419,780
2003	852,354	111,992	305,409	434,953
2004	858,562	115,391	309,472	433,699
2005	907,547	123,494	314,786	469,267
2006	897,035	126,860	321,155	449,020
2007	902,296	126,678	322,326	453,292
2008	960,873	140,581	329,397	490,895
2009	1,007,671	156,412	319,127	532,132
2010	1,044,506	155,193	320,293	569,020

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2010—Continued

Year	All children	Children of—		
		Retired workers	Deceased workers	Disabled workers
<i>Children under age 18</i>				
1940	59,382	8,249	51,133	...
1945	127,514	7,215	120,299	...
1950	122,641	25,495	97,146	...
1955	238,795	40,402	198,393	...
1960	391,366	57,239	231,611	102,516
1965	523,453	84,707	263,637	175,109
1970	678,940	99,353	337,960	241,627
1975	806,770	115,347	300,139	391,284
1980	573,828	111,610	227,139	235,079
1981	512,939	84,793	228,317	199,829
1982	457,445	81,502	222,738	153,205
1983	444,467	80,117	211,396	152,954
1984	449,242	74,328	202,163	172,721
1985	464,908	74,128	200,576	190,204
1986	465,115	70,915	196,008	198,192
1987	451,370	66,672	184,668	195,030
1988	452,519	63,586	192,278	196,655
1989	446,308	59,073	189,285	197,950
1990	468,439	60,588	189,792	218,059
1991	502,442	60,618	191,537	250,287
1992	559,725	61,034	192,689	306,002
1993	575,247	59,515	198,469	317,263
1994	586,342	57,677	201,598	327,067
1995	571,650	57,215	198,848	315,587
1996	561,687	56,126	194,333	311,228
1997	517,118	54,841	184,237	278,040
1998	516,100	54,218	182,118	279,764
1999	522,946	57,019	182,159	283,768
2000	525,390	68,440	184,762	272,188
2001	542,147	64,207	188,300	289,640
2002	578,906	66,992	192,226	319,688
2003	580,166	63,793	187,060	329,313
2004	578,844	65,490	188,435	324,919
2005	609,993	69,008	189,509	351,476
2006	585,334	69,819	189,654	325,861
2007	573,067	65,783	184,922	322,362
2008	605,931	73,528	183,754	348,649
2009	645,853	84,590	179,477	381,786
2010	662,361	79,649	173,723	408,989

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2010—Continued

Year	All children	Children of—		
		Retired workers	Deceased workers	Disabled workers
<i>Disabled adult children</i>				
1957	29,507	17,249	12,258	...
1960	24,353	12,740	9,819	1,794
1965	21,398	10,017	8,668	2,713
1970	24,547	11,348	9,425	3,774
1975	32,707	14,636	11,182	6,889
1976	34,517	15,602	11,546	7,369
1977	36,210	--	--	7,885
1978	33,611	15,378	11,013	7,220
1979	33,419	15,967	10,999	6,453
1980	33,470	16,650	10,626	6,194
1981	30,545	15,365	9,745	5,435
1982	28,707	14,772	9,685	4,250
1983	33,639	17,309	11,223	5,107
1984	36,427	18,330	12,556	5,541
1985	39,083	19,661	12,709	6,713
1986	40,525	20,295	13,244	6,986
1987	39,665	20,761	12,117	6,787
1988	38,702	20,544	11,512	6,646
1989	37,001	19,668	10,975	6,358
1990	38,772	20,862	11,277	6,633
1991	41,086	21,850	11,684	7,552
1992	47,009	23,615	13,846	9,548
1993	47,246	23,173	13,819	10,254
1994	44,483	22,119	12,590	9,774
1995	43,275	21,566	11,930	9,779
1996	40,583	20,169	11,061	9,353
1997	38,701	19,611	10,616	8,474
1998	39,941	19,932	10,914	9,095
1999	41,748	20,467	11,430	9,851
2000	43,845	22,567	11,621	9,657
2001	43,042	21,307	11,872	9,863
2002	46,636	22,881	12,685	11,070
2003	47,235	22,024	12,920	12,291
2004	48,772	22,531	13,999	12,242
2005	53,807	25,154	14,982	13,671
2006	58,519	25,679	17,467	15,373
2007	67,517	28,359	20,368	18,790
2008	79,694	32,712	24,369	22,613
2009	79,769	35,734	22,821	21,214
2010	81,681	35,533	21,942	24,206

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D4—Number of children, by type of benefit, selected years 1940–2010—Continued

Year	All children	Children of—		
		Retired workers	Deceased workers	Disabled workers
		<i>Students</i>		
1965	238,351	39,463	179,094	19,794
1970	387,378	71,894	244,339	71,145
1975	492,436	95,596	279,797	117,043
1976	544,739	108,197	295,058	141,484
1977	574,760	--	--	148,227
1978	544,396	105,719	291,434	147,243
1979	553,889	117,118	292,766	144,005
1980	566,814	120,398	302,481	143,935
1981	543,063	111,248	297,425	134,390
1982	430,563	86,575	240,973	103,015
1983	274,726	47,519	158,373	68,834
1984	235,895	39,328	136,577	59,990
1985	209,641	34,287	119,246	56,108
1986	194,987	31,442	110,556	52,989
1987	194,264	30,551	108,788	54,925
1988	214,810	32,529	120,556	61,725
1989	192,053	27,750	107,224	57,079
1990	188,096	26,655	102,547	58,894
1991	183,380	24,793	98,238	60,349
1992	187,837	24,037	97,765	66,035
1993	193,961	23,878	99,002	71,081
1994	193,414	23,187	95,863	74,364
1995	193,653	22,458	95,266	75,929
1996	196,215	22,360	97,086	76,769
1997	201,527	23,142	102,351	76,034
1998	207,129	22,743	101,819	82,567
1999	208,472	22,340	101,607	84,525
2000	207,441	24,351	101,303	81,787
2001	210,985	25,166	102,273	83,546
2002	220,819	26,313	105,484	89,022
2003	224,953	26,175	105,429	93,349
2004	230,946	27,370	107,038	96,538
2005	243,747	29,332	110,295	104,120
2006	253,182	31,362	114,034	107,786
2007	261,712	32,536	117,036	112,140
2008	275,248	34,341	121,274	119,633
2009	282,049	36,088	116,829	129,132
2010	300,464	40,011	124,628	135,825

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

NOTES: Beginning with 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

. . . = not applicable; -- = not available.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D5—Number and average monthly benefit for children, by type of benefit and age, 2010

Age	Total children		Children of—						
			Retired workers		Deceased workers		Disabled workers		
	Total 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 children									
Total	1,044,506	470.30	155,193	545.30	320,293	752.30	569,020	291.00	
Children under age 18									
Subtotal	662,361	411.10	79,649	534.40	173,723	723.10	408,989	254.60	
Under 1	48,033	286.30	2,230	466.30	8,616	640.90	37,187	193.30	
1	21,614	331.00	1,120	476.60	5,939	638.60	14,555	194.30	
2	23,514	347.60	1,405	470.70	6,788	659.90	15,321	197.90	
3	25,095	352.50	1,644	472.40	7,214	659.30	16,237	204.10	
4	26,631	359.60	1,915	465.40	7,666	674.90	17,050	206.00	
5	28,246	363.60	2,196	469.00	7,982	675.80	18,068	212.90	
6	29,912	372.50	2,439	465.20	8,461	690.20	19,012	219.20	
7	31,829	376.80	2,769	474.80	8,872	695.30	20,188	223.30	
8	34,163	386.80	3,083	482.00	9,520	704.80	21,560	232.80	
9	36,575	395.90	3,695	484.10	10,040	717.70	22,840	240.20	
10	38,907	401.80	4,190	494.30	10,635	721.70	24,082	244.40	
11	41,101	414.30	4,791	498.50	11,018	734.00	25,292	259.00	
12	43,700	422.00	5,509	513.90	11,344	738.20	26,847	269.60	
13	46,333	439.60	6,394	532.00	11,673	760.00	28,266	286.40	
14	48,936	453.40	7,277	548.30	12,212	764.30	29,447	301.10	
15	50,622	478.00	8,435	561.60	12,810	775.50	29,377	324.30	
16	49,535	510.90	10,242	595.10	12,857	787.80	26,436	343.70	
17	37,615	545.80	10,315	619.60	10,076	810.60	17,224	346.80	
Disabled adult children									
Subtotal	81,681	489.40	35,533	484.10	21,942	677.90	24,206	326.50	
Under 20	28,345	475.50	5,649	483.50	10,632	679.80	12,064	291.60	
20–24	15,623	488.80	5,244	510.50	4,434	677.10	5,945	329.40	
25–29	11,068	507.10	5,861	501.30	2,285	688.30	2,922	376.90	
30–34	10,220	515.30	6,755	497.90	1,609	700.20	1,856	418.20	
35–39	8,908	493.10	6,707	475.30	1,170	681.50	1,031	394.80	
40 or older	7,517	477.80	5,317	432.90	1,812	633.30	388	366.00	
Students aged 18–19									
Subtotal	300,464	595.40	40,011	621.60	124,628	806.30	135,825	394.30	
18	299,999	595.60	39,906	621.80	124,495	806.50	135,598	394.40	
19	465	463.10	105	549.20	133	608.70	227	338.00	

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

NOTES: Effective 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

Effective 2006, age is based on date of entitlement and not date of award. Entitlement can be retroactive and thus precede the date of award.

a. Benefits awarded before the December cost-of-living increase are converted to the December rates before averages are computed.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D6—Number of mothers and fathers, by type of benefit, 1950–2010

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, 1950–2010—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
2004	40,030	35,499	4,531	35,876	34,176	1,700	4,154
2005	38,248	34,036	4,212	34,256	32,872	1,384	3,992
2006	35,981	31,995	3,986	32,216	30,954	1,262	3,765
2007	33,597	29,869	3,728	29,954	28,691	1,263	3,643
2008	32,717	28,831	3,886	29,215	28,003	1,212	3,502
2009	32,878	28,612	4,266	29,262	27,992	1,270	3,616
2010	31,797	27,528	4,269	28,330	27,056	1,274	3,467

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: (410) 965-0090 or statistics@ssa.gov.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D7—Number and average monthly benefit for widow(er)s, by age and sex, 2010

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	478,434	932.90	38,530	674.70	33,259	666.80	31,797	821.20
By age								
Under 25	...	...	...	...	...	...	949	631.60
25–29	...	...	...	...	...	...	2,382	679.60
30–34	...	...	...	...	...	...	3,936	698.40
35–39	...	...	...	...	...	...	5,680	764.20
40–44	...	...	...	...	...	...	6,543	841.30
45–49	...	...	...	...	...	...	6,299	906.50
50–54	...	...	...	...	16,298	663.20	3,742	941.80
55–59	...	...	...	...	16,707	668.90	1,624	931.50
60–64	156,027	1,087.90	18,057	863.40	248	759.70	541	844.20
60	64,719	1,087.60	6,695	838.30	119	698.80	163	843.50
61	25,785	1,127.80	5,257	858.30	74	862.80	144	890.00
62	24,292	1,081.20	2,637	919.60	27	765.00	97	813.40
63	20,776	1,052.10	1,746	873.30	21	772.00	80	818.30
64	20,455	1,082.80	1,722	880.80	7	646.50	57	819.40
65–69	103,449	926.20	7,322	740.50	6	550.30	101	844.30
65	48,453	1,013.90	3,429	895.90	6	550.30	101	844.30
66	17,861	997.60	1,469	795.80	...	...	...	...
67	12,867	798.20	961	500.10	...	...	...	...
68	12,401	770.10	775	492.50	...	...	...	...
69	11,867	762.70	688	463.20	...	...	...	...
70–74	61,021	747.10	3,537	396.40	...	...	...	...
70	11,949	756.50	671	392.80	...	...	...	...
71	12,313	734.60	692	405.00	...	...	...	...
72	12,316	736.20	690	399.20	...	...	...	...
73	12,223	755.60	707	381.70	...	...	...	...
74	12,220	752.90	777	402.70	...	...	...	...
75–79	61,626	803.10	3,487	381.00	...	...	...	...
75	12,718	773.50	710	368.70	...	...	...	...
76	11,951	790.20	704	395.70	...	...	...	...
77	12,323	796.60	712	391.20	...	...	...	...
78	12,343	822.50	644	372.20	...	...	...	...
79	12,291	833.40	717	376.50	...	...	...	...
80 or older	96,311	889.90	6,127	367.80	...	...	...	...
By sex								
Men	...	...	38,530	674.70	2,740	510.10	4,269	691.30
Women	478,434	932.90	...	...	30,519	680.90	27,528	841.30
Widow or mother	411,667	928.80	...	...	25,966	678.00	24,372	842.80
Surviving divorced wife or mother	66,767	957.90	...	...	4,553	697.30	3,156	830.50

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

NOTES: Effective 2006, age is based on date of entitlement and not date of award. Entitlement can be retroactive and thus precede the date of award.

... = not applicable.

a. Benefits awarded before the December cost-of-living increase are converted to the December rates before averages are computed.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D8—Number of widow(er)s, by type of benefit, 1950–2010

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

(Continued)

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D8—Number of widow(er)s, by type of benefit, 1950–2010—Continued

Year	Total	Entitled because of age		Entitled because of disability	
		Widows	Widowers	Widows	Widowers
2000	505,021	453,334	23,645	26,997	1,045
2001	495,848	443,267	24,309	27,179	1,093
2002	522,537	465,627	27,306	28,211	1,393
2003	508,306	451,583	28,209	27,130	1,384
2004	513,839	456,732	29,033	26,621	1,453
2005	516,949	457,549	29,579	28,127	1,694
2006	512,320	453,754	29,884	27,067	1,615
2007	569,862	509,524	31,528	27,066	1,744
2008	589,940	524,757	34,578	28,500	2,105
2009	547,495	478,914	37,063	29,174	2,344
2010	550,223	478,434	38,530	30,519	2,740

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

NOTES: Beginning with 2006, individuals whose benefits have been reinstated under the Expedited Reinstatement provisions are no longer included. Therefore, the statistics reported in this publication differ from those reported by the Office of the Chief Actuary.

. . . = not applicable.

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

6.D OASDI Benefits Awarded: Dependents and Survivors

Table 6.D9—Number and average amount of lump-sum death payment awards, 1940–2010

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, 1940–2010—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	835,360	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	845,135	850,411	255.00
2001	843,983	849,102	255.00
2002	837,338	842,060	255.00
2003	817,591	821,613	255.00
2004	821,491	826,408	255.00
2005	827,492	830,912	255.00
2006	817,859	821,581	255.00
2007	801,546	806,447	255.00
2008	814,112	816,878	255.00
2009	775,580	807,601	255.00
2010	782,649	816,767	255.00

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

6.E OASDI: Benefits Withheld

Table 6.E1—Number and percentage distribution of retired workers with benefits withheld, with and without reduction for early retirement, by sex and monthly benefit, December 2010

Sex and monthly benefit (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
All retired workers	216,411	100.0	165,573	100.0	50,838	100.0
Less than 350.00	52,163	24.1	37,727	22.8	14,436	28.4
350.00–399.90	4,136	1.9	3,331	2.0	805	1.6
400.00–449.90	6,313	2.9	2,685	1.6	3,628	7.1
450.00–499.90	4,239	2.0	2,831	1.7	1,408	2.8
500.00–549.90	5,582	2.6	4,214	2.5	1,368	2.7
550.00–599.90	6,710	3.1	4,896	3.0	1,814	3.6
600.00–649.90	7,053	3.3	5,115	3.1	1,938	3.8
650.00–699.90	7,240	3.3	5,365	3.2	1,875	3.7
700.00–749.90	7,562	3.5	5,783	3.5	1,779	3.5
750.00–799.90	7,276	3.4	5,662	3.4	1,614	3.2
800.00–849.90	7,111	3.3	5,628	3.4	1,483	2.9
850.00–899.90	6,716	3.1	5,349	3.2	1,367	2.7
900.00–949.90	6,551	3.0	5,199	3.1	1,352	2.7
950.00–999.90	5,956	2.8	4,768	2.9	1,188	2.3
1,000.00–1,049.90	5,955	2.8	4,747	2.9	1,208	2.4
1,050.00–1,099.90	5,694	2.6	4,565	2.8	1,129	2.2
1,100.00–1,149.90	5,280	2.4	4,287	2.6	993	2.0
1,150.00–1,199.90	4,816	2.2	3,961	2.4	855	1.7
1,200.00–1,249.90	4,535	2.1	3,838	2.3	697	1.4
1,250.00–1,299.90	4,273	2.0	3,563	2.2	710	1.4
1,300.00–1,349.90	3,936	1.8	3,339	2.0	597	1.2
1,350.00–1,399.90	3,684	1.7	3,115	1.9	569	1.1
1,400.00–1,449.90	4,195	1.9	3,685	2.2	510	1.0
1,450.00–1,499.90	4,555	2.1	4,073	2.5	482	0.9
1,500.00 or more	34,880	16.1	27,847	16.8	7,033	13.8
Men	125,210	100.0	92,473	100.0	32,737	100.0
Less than 350.00	22,950	18.3	16,671	18.0	6,279	19.2
350.00–399.90	2,389	1.9	1,909	2.1	480	1.5
400.00–449.90	4,238	3.4	1,559	1.7	2,679	8.2
450.00–499.90	2,699	2.2	1,656	1.8	1,043	3.2
500.00–549.90	3,362	2.7	2,348	2.5	1,014	3.1
550.00–599.90	3,849	3.1	2,568	2.8	1,281	3.9
600.00–649.90	3,760	3.0	2,419	2.6	1,341	4.1
650.00–699.90	3,710	3.0	2,381	2.6	1,329	4.1
700.00–749.90	3,585	2.9	2,345	2.5	1,240	3.8
750.00–799.90	3,378	2.7	2,258	2.4	1,120	3.4
800.00–849.90	3,339	2.7	2,298	2.5	1,041	3.2
850.00–899.90	3,093	2.5	2,160	2.3	933	2.8
900.00–949.90	3,250	2.6	2,312	2.5	938	2.9
950.00–999.90	3,114	2.5	2,306	2.5	808	2.5
1,000.00–1,049.90	3,225	2.6	2,386	2.6	839	2.6
1,050.00–1,099.90	3,253	2.6	2,484	2.7	769	2.3
1,100.00–1,149.90	3,099	2.5	2,422	2.6	677	2.1
1,150.00–1,199.90	2,962	2.4	2,345	2.5	617	1.9
1,200.00–1,249.90	2,872	2.3	2,375	2.6	497	1.5
1,250.00–1,299.90	2,725	2.2	2,232	2.4	493	1.5
1,300.00–1,349.90	2,550	2.0	2,141	2.3	409	1.2
1,350.00–1,399.90	2,504	2.0	2,095	2.3	409	1.2
1,400.00–1,449.90	3,002	2.4	2,652	2.9	350	1.1
1,450.00–1,499.90	3,345	2.7	2,997	3.2	348	1.1
1,500.00 or more	28,957	23.1	23,154	25.0	5,803	17.7

(Continued)

Table 6.E1—Number and percentage distribution of retired workers with benefits withheld, with and without reduction for early retirement, by sex and monthly benefit, December 2010—Continued

Sex and monthly benefit (dollars)	Total		With reduction for early retirement		Without reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Women	91,201	100.0	73,100	100.0	18,101	100.0
Less than 350.00	29,213	32.0	21,056	28.8	8,157	45.1
350.00–399.90	1,747	1.9	1,422	1.9	325	1.8
400.00–449.90	2,075	2.3	1,126	1.5	949	5.2
450.00–499.90	1,540	1.7	1,175	1.6	365	2.0
500.00–549.90	2,220	2.4	1,866	2.6	354	2.0
550.00–599.90	2,861	3.1	2,328	3.2	533	2.9
600.00–649.90	3,293	3.6	2,696	3.7	597	3.3
650.00–699.90	3,530	3.9	2,984	4.1	546	3.0
700.00–749.90	3,977	4.4	3,438	4.7	539	3.0
750.00–799.90	3,898	4.3	3,404	4.7	494	2.7
800.00–849.90	3,772	4.1	3,330	4.6	442	2.4
850.00–899.90	3,623	4.0	3,189	4.4	434	2.4
900.00–949.90	3,301	3.6	2,887	3.9	414	2.3
950.00–999.90	2,842	3.1	2,462	3.4	380	2.1
1,000.00–1,049.90	2,730	3.0	2,361	3.2	369	2.0
1,050.00–1,099.90	2,441	2.7	2,081	2.8	360	2.0
1,100.00–1,149.90	2,181	2.4	1,865	2.6	316	1.7
1,150.00–1,199.90	1,854	2.0	1,616	2.2	238	1.3
1,200.00–1,249.90	1,663	1.8	1,463	2.0	200	1.1
1,250.00–1,299.90	1,548	1.7	1,331	1.8	217	1.2
1,300.00–1,349.90	1,386	1.5	1,198	1.6	188	1.0
1,350.00–1,399.90	1,180	1.3	1,020	1.4	160	0.9
1,400.00–1,449.90	1,193	1.3	1,033	1.4	160	0.9
1,450.00–1,499.90	1,210	1.3	1,076	1.5	134	0.7
1,500.00 or more	5,923	6.5	4,693	6.4	1,230	6.8

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

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

CONTACT: (410) 965-0090 or statistics@ssa.gov.

6.E OASDI: Benefits Withheld

Table 6.E4—Number of beneficiaries with benefits withheld, by reason for withholding payment and type of benefit, December 2010

Reason payment withheld	Total, all beneficiaries	Retired workers			Disabled workers	Wives and husbands				Children	Widowed mothers and fathers	Widow-(er)s	Parents
		Subtotal	Men	Women		Subtotal	Wives		Husbands				
							Without children ^a	With children ^b					
Total	2,303,559	216,411	125,210	91,201	131,499	364,083	246,195	41,323	76,565	675,971	48,788	866,188	619
Earnings of—													
Retired workers	81,817	77,120	42,994	34,126	...	2,705	2,372	202	131	1,992	...	...	...
Other beneficiaries	64,928	...	...	...	...	24,697	1,148	21,396	2,153	82	26,535	13,614	...
Entitled child not in care of beneficiary	24,014	...	...	...	...	10,678	...	10,002	676	...	13,336	...	...
Payee not determined	9,794	756	386	370	2,019	64	61	1	2	6,596	3	355	1
Recoupment of overpayment for reasons other than earnings	39,569	10,817	5,476	5,341	8,000	2,263	1,359	815	89	13,562	1,335	3,590	2
Address unknown	84,713	28,802	17,043	11,759	14,358	2,477	1,738	411	328	26,807	330	11,887	52
Determination of continuing disability pending	5,257	...	...	...	3,457	62	2	60	...	1,720	4	14	...
Workers' compensation offset	9,481	...	...	...	3,322	470	111	348	11	5,689	...	...	...
Government pension offset	403,854	...	...	...	...	256,902	189,549	72	67,281	...	93	146,859	...
Technical entitlement	1,261,086	...	...	...	...	31,908	23,767	5,151	2,990	563,780	1,943	663,348	107
Other reasons	319,046	98,916	59,311	39,605	100,343	31,857	26,088	2,865	2,904	55,743	5,209	26,521	457

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.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 6.E5—Number of wives, husbands, and children with benefits withheld, by reason for withholding payment and type of benefit, December 2010

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	318,167	45,916	28,019	46,239	325,282	115,581	105,928	45,077	1,377	2,473	5,995
Earnings of—											
Retired workers	2,705	...	1,544	...	...	354	...	...	94	...	...
Other beneficiaries	5,522	19,175	18	13	25	7	12	1	2	2	2
Entitled child not in care of beneficiary	1,571	9,107	...	...	...	...	...	...	...	...	...
Payee not determined	62	2	308	2,351	2,716	185	885	116	...	19	16
Recoupment of overpayment for reasons other than earnings	1,471	792	530	3,025	8,479	349	589	162	34	184	210
Address unknown	2,046	431	1,354	5,652	14,487	773	3,321	709	50	244	217
Determination of continuing disability pending	...	62	...	9	1,097	92	345	160	...	...	17
Workers' compensation offset	...	470	...	...	5,398	...	...	171	...	...	120
Government pension offset	252,772	4,130	...	...	...	...	...	...	...	...	...
Technical entitlement	22,657	9,251	20,555	25,736	270,498	110,578	89,770	38,788	1,118	1,751	4,986
Other reasons	29,361	2,496	3,710	9,453	22,582	3,243	11,006	4,970	79	273	427

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

NOTE: ... = not applicable.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

6.F OASDI: Benefits Terminated

Table 6.F1—Number of benefits terminated, by type, 1940–2010

Year	Total, all benefits ^a	Retired workers	Disabled workers	Wives and husbands	Children				Widowed mothers and fathers	Widow(er)s	Parents
					Total	Under age 18	Disabled adult children	Students			
Total	162,582,643	58,845,761	18,517,996	19,178,278	44,652,843	28,275,491	1,005,091	15,372,261	4,819,199	15,227,029	108,753
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
1967	2,545,076	748,184	208,899	373,803	820,610	503,110	9,178	308,322	102,004	172,411	3,789
1968	2,654,191	789,586	222,197	386,245	837,390	514,363	10,620	312,407	100,344	188,844	4,004
1969	2,860,287	827,151	251,269	399,689	946,481	564,725	11,922	369,834	107,119	205,188	3,525
1970	2,841,523	817,129	260,444	388,574	956,566	582,918	11,795	361,853	102,578	208,843	3,313
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
1988	3,087,126	1,227,357	356,143	354,250	723,385	484,001	19,478	219,906	73,473	341,432	922
1989	2,977,413	1,202,430	351,402	339,550	678,094	454,048	19,726	204,320	66,527	332,040	856
1990	2,958,646	1,222,810	348,194	337,006	646,343	415,616	20,014	210,713	64,260	334,293	769
1991	2,943,272	1,237,517	351,303	332,892	619,977	401,092	17,723	201,162	61,383	335,740	646
1992	2,969,109	1,252,171	361,796	329,102	616,771	397,723	17,857	201,191	65,852	339,827	617
1993	3,075,227	1,313,867	372,317	336,335	632,585	408,497	18,842	205,246	62,436	354,833	578
1994	3,124,009	1,329,241	384,590	331,416	647,848	421,730	20,034	206,084	72,662	356,097	529
1995	3,161,744	1,334,027	399,475	327,233	678,821	451,375	22,639	204,807	61,813	358,691	493
1996	3,187,291	1,352,339	396,980	321,703	690,618	459,254	23,776	207,588	61,618	362,751	444
1997	3,413,296	1,370,596	464,984	319,172	777,803	537,259	26,210	214,334	60,342	419,105	376
1998	3,307,618	1,405,342	409,489	313,423	741,412	495,678	26,755	218,979	54,551	382,619	346
1999	3,366,363	1,436,865	433,950	312,867	748,950	490,634	29,444	228,872	51,341	381,791	361

(Continued)

Table 6.F1—Number of benefits terminated, by type, 1940–2010—Continued

Year	Total, all benefits ^a	Retired workers	Disabled workers	Wives and husbands	Children				Widowed mothers and fathers	Widow(er)s	Parents
					Total	Under age 18	Disabled adult children	Students			
2000	3,404,466	1,447,269	460,351	310,703	753,430	502,351	33,300	217,779	50,925	381,341	282
2001	3,440,679	1,460,763	459,073	304,413	775,873	515,300	32,988	227,585	49,838	390,315	289
2002	3,494,924	1,465,869	478,098	306,796	807,955	534,181	34,722	239,052	49,919	385,945	265
2003	3,411,500	1,447,461	447,485	292,156	796,560	526,475	33,030	237,055	47,418	380,155	226
2004	3,480,809	1,453,625	458,359	292,183	849,643	555,137	32,802	261,704	48,610	378,153	208
2005	3,522,025	1,479,956	485,715	285,609	845,835	566,052	35,018	244,765	46,275	378,403	209
2006	3,607,381	1,473,218	506,663	292,969	912,478	616,362	44,575	251,541	47,326	374,512	178
2007	3,483,878	1,475,216	510,645	251,573	841,266	553,094	32,031	256,141	41,264	363,725	189
2008	3,622,908	1,521,555	550,593	252,485	871,484	568,468	35,093	267,923	39,200	387,406	185
2009	3,621,331	1,489,329	617,587	240,867	864,091	543,314	36,421	284,356	36,842	372,476	139
2010	3,725,278	1,538,386	631,063	239,168	906,191	567,996	37,613	300,582	36,067	374,236	167

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

NOTE: . . . = not applicable.

a. Annual totals for 1966 through 2006 include special age-72 beneficiaries; for all years combined, these terminations number 1,232,784 and are included in the cumulative total.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

6.F OASDI: Benefits Terminated

Table 6.F2—Number, by reason for termination and type of benefit, 2010

Reason for termination	All benefits	Retired workers	Disabled workers	Wives and husbands	Children	Widowed mothers and fathers	Widow(er)s and parents
Total	3,725,278	1,538,386	631,063	239,168	906,191	36,067	374,403
Death of beneficiary	2,070,976	1,437,298	231,458	72,689	23,371	735	305,425
Death of worker	145,242	...	...	119,497	25,745	...	...
Marriage, remarriage, or divorce of beneficiary	14,287	...	...	2,440	5,397	6,296	154
Attainment of—							
Age 16 by child	44,310	...	...	18,141	...	26,169	...
Age 18 by child	493,163	...	...	...	493,163	...	...
Age 19 by student	64,500	...	...	...	64,500	...	...
FRA by disabled worker	346,572	...	333,327	6,080	7,165	...	...
FRA by disabled widow(er)	--	...	...	...	...	...	--
Entitlement to an equal or larger Social Security benefit	136,710	72,310	2,776	8,435	3,102	2,061	48,026
Does not meet medical standards ^a							
Disabled worker or widow(er)	97,132	...	57,511	1,296	38,075	...	250
Disabled adult child	3,788	...	...	...	3,788	...	...
Student no longer attending school	231,842	...	...	...	231,842	...	...
Other	76,756	28,778	5,991	10,590	10,043	806	20,548

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

NOTE: ... = not applicable; -- = not available; 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: (410) 965-0090 or statistics@ssa.gov.

Table 6.F3—Number of wives, husbands, and children, by reason for termination and type of benefit, 2010

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	208,706	30,462	64,741	200,433	302,822	6,438	20,791	10,384	40,622	135,480	124,480
Death of beneficiary	70,985	1,704	143	893	725	4,179	16,500	789	23	65	54
Death of worker	115,402	4,095	...	...	21,938	...	...	2,352	...	...	1,455
Marriage, remarriage, or divorce of beneficiary	914	1,526	355	340	1,200	642	1,533	1,023	26	118	160
Attainment of—											
Age 16 by child	6,708	11,433	...	...	...	...	...	...	...	...	...
Age 18 by child	...	...	61,903	198,482	232,778	...	...	...	...	...	...
Age 19 by student	...	...	...	...	...	...	...	...	7,862	31,809	24,829
FRA by disabled worker	...	6,080	...	...	4,599	...	...	2,327	...	...	239
Entitlement to an equal or larger Social Security benefit	6,853	1,582	1,520	126	424	495	180	184	145	7	21
Does not meet medical standards ^a											
Disabled worker	...	1,296	...	...	35,624	...	...	2,017	...	...	434
Disabled adult child	...	...	...	...	...	831	2,479	478	...	...	...
Student no longer attending school	...	...	...	...	...	...	...	...	32,339	103,153	96,350
Other	7,844	2,746	820	592	5,534	291	99	1,214	227	328	938

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: (410) 965-0090 or statistics@ssa.gov.



Supplemental Security Income

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Table 7.A1—Number of recipients of federally administered payments, total payments, and average monthly payment, by source of payment, eligibility category, and age, December 2010

Source of payment	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older ^a
Number of recipients							
Total	7,912,266	1,183,853	69,289	6,659,124	1,239,269	4,631,507	2,041,490
Federal payment only	5,526,333	595,546	40,852	4,889,935	990,701	3,401,733	1,133,899
Federal payment and state supplementation	2,129,334	503,206	24,229	1,601,899	246,936	1,100,080	782,318
State supplementation only	256,599	85,101	4,208	167,290	1,632	129,694	125,273
Total with—							
Federal payment	7,655,667	1,098,752	65,081	6,491,834	1,237,637	4,501,813	1,916,217
State supplementation	2,385,933	588,307	28,437	1,769,189	248,568	1,229,774	907,591
Total payments^b (thousands of dollars)							
Total	4,273,680	474,932	36,836	3,761,912	780,109	2,663,101	830,470
Federal payments	3,960,438	394,865	31,315	3,534,258	766,520	2,488,151	705,767
State supplementation	313,242	80,067	5,521	227,654	13,588	174,950	124,703
Average monthly payment^c (dollars)							
Total	500.69	399.75	521.62	518.44	596.72	517.21	405.08
Federal payments	478.73	358.32	472.95	499.20	587.33	496.54	366.98
State supplementation	124.29	134.95	188.84	119.71	50.81	130.36	136.18

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

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

a. Includes approximately 14,700 blind and 842,900 disabled persons aged 65 or older.

b. Includes retroactive payments.

c. Excludes retroactive payments.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

Source of payment	Aged		Blind		Disabled		Blind and disabled under age 18
	Individual	Couple	Individual	Couple	Individual	Couple	
Number of recipients							
Total	916,864	133,501	59,535	2,477	5,137,648	143,492	1,239,267
Federal payment only	488,451	53,452	35,221	1,041	3,730,315	86,266	990,699
Federal payment and state supplementation	368,053	68,164	20,500	1,216	1,253,905	50,909	246,936
State supplementation only	60,360	11,885	3,814	220	153,428	6,317	1,632
Total with—							
Federal payment	856,504	121,616	55,721	2,257	4,984,220	137,175	1,237,635
State supplementation	428,413	80,049	24,314	1,436	1,407,333	57,226	248,568
Total payments^a (thousands of dollars)							
Total	370,788	105,648	31,320	2,268	2,870,147	113,404	780,108
Federal payments	314,411	81,909	26,633	1,651	2,672,926	96,390	766,519
State supplementation	56,377	23,739	4,687	616	197,221	17,013	13,588
Average monthly payment^b (dollars)							
Total	403.08	786.76	516.04	896.86	507.17	760.30	596.73
Federal payments	366.12	670.40	469.59	717.27	486.12	676.16	587.33
State supplementation	130.34	294.41	187.65	425.81	129.92	287.95	50.81

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

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

a. Includes retroactive payments.

b. Excludes retroactive payments.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

7.A SSI: Summary

Table 7.A3—Number of recipients of federally administered payments, by eligibility category, January 1974 and December 1975–2010, selected years

Month and year	Total ^a	Federal SSI	Federally administered state supplementation	State supplementation only
All recipients				
January 1974	3,215,632	2,955,959	1,480,309	259,673
December				
1975	4,314,275	3,893,419	1,684,018	420,856
1980	4,142,017	3,682,411	1,684,765	459,606
1985	4,138,021	3,799,092	1,660,847	338,929
1990	4,817,127	4,412,131	2,058,273	404,996
1995	6,514,134	6,194,493	2,517,805	319,641
2000	6,601,686	6,319,907	2,480,637	281,779
2001	6,688,489	6,410,138	2,520,005	278,351
2002	6,787,857	6,505,227	2,461,652	282,630
2003	6,902,364	6,614,465	2,467,116	287,899
2004	6,987,845	6,694,577	2,497,589	293,268
2005	7,113,879	6,818,944	2,242,112	294,935
2006	7,235,583	6,938,690	2,268,579	296,893
2007	7,359,525	7,061,234	2,302,130	298,291
2008	7,520,501	7,219,012	2,343,599	301,489
2009	7,676,686	7,422,879	2,339,346	253,807
2010	7,912,266	7,655,667	2,385,933	256,599
Aged				
January 1974	1,865,109	1,690,496	770,318	174,613
December				
1975	2,307,105	2,024,765	843,917	282,340
1980	1,807,776	1,533,366	702,763	274,410
1985	1,504,469	1,322,292	583,913	182,177
1990	1,454,041	1,256,623	649,530	197,418
1995	1,446,122	1,314,720	663,390	131,402
2000	1,289,339	1,186,309	622,668	103,030
2001	1,264,463	1,164,825	620,952	99,638
2002	1,251,528	1,151,652	611,395	99,876
2003	1,232,778	1,132,947	602,807	99,831
2004	1,211,167	1,110,757	601,078	100,410
2005	1,214,296	1,112,779	584,787	101,517
2006	1,211,656	1,108,925	590,575	102,731
2007	1,204,512	1,101,440	595,555	103,072
2008	1,203,256	1,100,188	600,909	103,068
2009	1,185,959	1,100,626	587,766	85,333
2010	1,183,853	1,098,752	588,307	85,101
Blind				
January 1974	72,390	55,680	37,326	16,710
December				
1975	74,489	68,375	31,376	6,114
1980	78,401	68,945	36,214	9,456
1985	82,220	73,817	38,291	8,403
1990	83,686	74,781	40,334	8,905
1995	83,545	77,064	38,695	6,481
2000	78,511	72,931	35,940	5,580
2001	78,255	72,811	35,708	5,444
2002	77,658	72,189	34,596	5,469
2003	77,082	71,621	34,142	5,461
2004	75,924	70,469	33,765	5,455
2005	75,039	69,637	31,346	5,402
2006	73,418	68,165	30,657	5,253
2007	71,727	66,611	30,048	5,116
2008	70,325	65,330	29,535	4,995
2009	69,302	65,093	28,533	4,209
2010	69,289	65,081	28,437	4,208

(Continued)

Table 7.A3—Number of recipients of federally administered payments, by eligibility category, January 1974 and December 1975–2010, selected years—Continued

Month and year	Total ^a	Federal SSI	Federally administered state supplementation	State supplementation only
		<i>Disabled</i>		
January 1974	1,278,122	1,209,783	672,575	68,350
December				
1975	1,932,681	1,800,279	808,725	132,402
1980	2,255,840	2,080,100	945,788	175,740
1985	2,551,332	2,402,983	1,038,643	148,349
1990	3,279,400	3,080,727	1,368,409	198,673
1995	4,984,467	4,802,709	1,815,720	181,758
2000	5,233,836	5,060,667	1,822,029	173,169
2001	5,345,771	5,172,502	1,863,345	173,269
2002	5,458,671	5,281,386	1,815,661	177,285
2003	5,592,504	5,409,897	1,830,167	182,607
2004	5,700,754	5,513,351	1,862,746	187,403
2005	5,824,544	5,636,528	1,625,979	188,016
2006	5,950,509	5,761,600	1,647,347	188,909
2007	6,083,286	5,893,183	1,676,527	190,103
2008	6,246,920	6,053,494	1,713,155	193,426
2009	6,421,425	6,257,160	1,723,047	164,265
2010	6,659,124	6,491,834	1,769,189	167,290

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

a. Total equals the sum of "Federal SSI" and "State supplementation only."

CONTACT: (410) 965-0090 or statistics@ssa.gov.

7.A SSI: Summary

**Table 7.A4—Total federally administered payments, by eligibility category, selected years 1974–2010
(in thousands of dollars)**

Year	Total	Federal SSI	Federally administered state supplementation
<i>All recipients</i>			
1974	5,096,813	3,833,161	1,263,652
1975	5,716,072	4,313,538	1,402,534
1980	7,714,640	5,866,354	1,848,286
1985	10,749,938	8,777,341	1,972,597
1990	16,132,959	12,893,805	3,239,154
1995	27,037,280	23,919,430	3,117,850
2000	30,671,699	27,290,248	3,381,451
2001	32,165,856	28,705,503	3,460,353
2002	33,718,999	29,898,765	3,820,234
2003	34,693,278	30,688,029	4,005,249
2004	36,065,358	31,886,509	4,178,849
2005	37,235,843	33,058,056	4,177,787
2006	38,888,961	34,736,088	4,152,873
2007	41,204,645	36,884,066	4,320,579
2008	43,040,481	38,655,780	4,384,701
2009	46,592,308	42,628,709	3,963,606
2010	48,194,514	44,605,122	3,589,392
<i>Aged</i>			
1974	2,414,034	1,782,742	631,292
1975	2,516,515	1,842,980	673,535
1980	2,617,023	1,860,194	756,829
1985	2,896,671	2,202,557	694,114
1990	3,559,388	2,521,382	1,038,006
1995	4,239,222	3,374,772	864,450
2000	4,540,045	3,597,516	942,530
2001	4,664,076	3,708,527	955,549
2002	4,802,792	3,751,491	1,051,301
2003	4,856,875	3,758,070	1,098,805
2004	4,894,070	3,773,901	1,133,324
2005	4,964,627	3,836,625	1,128,002
2006	5,115,911	3,953,106	1,162,804
2007	5,301,277	4,113,424	1,187,853
2008	5,378,921	4,180,786	1,198,135
2009	5,569,078	4,499,045	1,070,033
2010	5,453,906	4,529,485	924,422
<i>Blind</i>			
1974	125,791	91,308	34,483
1975	127,240	92,427	34,813
1980	185,827	131,506	54,321
1985	259,840	195,183	64,657
1990	328,949	238,415	90,534
1995	367,441	298,238	69,203
2000	385,927	312,238	73,688
2001	398,624	323,895	74,729
2002	416,454	335,405	81,049
2003	409,293	325,878	83,415
2004	412,414	327,446	85,364
2005	414,147	330,591	83,556
2006	409,287	326,230	83,057
2007	418,835	336,789	82,046
2008	416,017	335,179	80,838
2009	426,533	354,817	71,716
2010	423,215	359,096	64,119

(Continued)

**Table 7.A4—Total federally administered payments, by eligibility category, selected years 1974–2010
(in thousands of dollars)—Continued**

Year	Total	Federal SSI	Federally administered state supplementation
		<i>Disabled</i>	
1974	2,556,988	1,959,112	597,876
1975	3,072,317	2,378,131	694,186
1980	4,911,792	3,874,655	1,037,137
1985	7,593,427	6,379,601	1,213,826
1990	12,244,622	10,134,007	2,110,615
1995	22,430,612	20,246,415	2,184,197
2000	25,745,710	23,380,477	2,365,233
2001	27,125,707	24,695,630	2,430,077
2002	28,499,771	25,811,887	2,687,884
2003	29,429,428	26,606,400	2,823,028
2004	30,745,406	27,785,246	2,960,160
2005	31,857,069	28,890,840	2,966,229
2006	33,363,762	30,456,751	2,907,011
2007	35,484,533	32,433,853	3,050,680
2008	37,245,543	34,139,815	3,105,728
2009	40,596,703	37,774,847	2,821,857
2010	42,317,393	39,716,541	2,600,852

SOURCE: Social Security Administration, Office of Financial Policy and Operations.

NOTE: Totals for "Aged," "Blind," and "Disabled" are derived. The derivation creates slight discrepancies between the sum of the group totals and the "All recipients" total.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

7.A SSI: Summary

Table 7.A5—Average monthly federally administered payment, by eligibility category, December 1975–2010, selected years (in dollars)

Year	Total	Federal SSI	Federally administered state supplementation
<i>All recipients</i>			
1975	106.33	90.59	61.72
1980	161.92	138.14	95.17
1985	218.09	193.77	99.39
1990	276.45	241.52	127.83
1995	335.45	312.83	98.66
2000	378.82	351.48	112.50
2001	393.96	366.31	113.65
2002	407.42	376.76	127.53
2003	417.16	383.59	138.38
2004	428.29	395.36	138.07
2005	439.09	406.50	156.30
2006	454.75	423.05	156.24
2007	468.36	437.05	156.56
2008	477.79	447.00	156.23
2009	498.75	476.33	124.96
2010	500.69	478.73	124.29
<i>Aged</i>			
1975	86.72	73.77	57.38
1980	126.66	105.69	95.60
1985	164.01	141.41	103.58
1990	208.26	170.74	136.31
1995	250.27	220.15	109.62
2000	299.69	258.12	128.46
2001	314.22	271.13	130.89
2002	330.04	280.86	146.17
2003	342.28	287.10	160.02
2004	350.53	295.13	160.44
2005	360.25	303.29	170.39
2006	373.05	316.48	170.64
2007	384.15	327.06	171.69
2008	393.46	336.03	172.29
2009	399.14	357.86	134.96
2010	399.75	358.32	134.95
<i>Blind</i>			
1975	137.58	112.69	78.57
1980	192.51	163.36	111.41
1985	260.25	224.31	122.15
1990	319.03	267.34	167.29
1995	355.24	317.06	138.31
2000	413.22	360.51	171.01
2001	428.04	374.72	173.98
2002	444.54	384.79	194.31
2003	454.85	389.20	210.51
2004	463.44	398.15	210.69
2005	474.62	407.87	229.41
2006	488.42	423.15	228.97
2007	500.22	435.15	229.27
2008	507.66	442.42	229.60
2009	520.30	470.63	189.20
2010	521.62	472.95	188.84

(Continued)

Table 7.A5—Average monthly federally administered payment, by eligibility category, December 1975–2010, selected years (in dollars)—Continued

Year	Total	Federal SSI	Federally administered state supplementation
		<i>Disabled</i>	
1975	128.49	108.55	65.68
1980	188.70	160.78	94.38
1985	246.50	219.61	96.63
1990	302.78	266.84	123.36
1995	358.18	336.39	94.26
2000	397.92	373.41	105.86
2001	412.46	387.80	106.72
2002	424.75	397.71	119.94
2003	433.16	403.76	129.89
2004	444.40	415.59	129.51
2005	455.13	426.95	149.80
2006	471.00	443.61	149.71
2007	484.67	457.67	149.87
2008	493.70	467.24	149.33
2009	516.93	497.26	120.48
2010	518.44	499.20	119.71

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: Excludes retroactive payments.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

7.A SSI: Summary

Table 7.A8—Number of federally administered awards, by eligibility category and age, 1974–2010

Year	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older
All awards	31,024,392	8,006,634	320,211	22,697,547	4,286,267	18,571,659	8,166,466
State conversions ^a	3,155,995	1,765,946	76,560	1,313,489	2,748	1,299,343	1,853,904
Federal applications							
1974	1,336,164	771,459	8,072	556,633	66,699	493,511	775,954
1975	929,369	350,918	8,656	569,795	63,060	509,271	357,038
1976	667,994	217,852	7,197	442,945	46,114	400,314	221,566
1977	642,712	211,716	7,919	423,077	50,883	377,454	214,375
1978	563,117	192,927	7,696	362,494	46,520	321,413	195,184
1979	517,446	176,739	7,784	332,923	44,911	293,910	178,625
1980	523,758	184,399	8,819	330,540	45,781	292,080	185,897
1981	409,992	121,655	8,017	280,320	39,106	248,105	122,781
1982	343,928	104,207	6,733	232,988	35,410	203,335	105,183
1983	453,789	151,406	7,985	294,398	42,154	259,042	152,593
1984	585,832	215,898	8,390	361,544	45,766	322,858	217,208
1985	526,418	153,962	8,176	364,280	46,362	324,933	155,123
1986	603,989	161,781	7,850	434,358	50,632	390,499	162,858
1987	589,053	166,775	7,468	414,810	48,292	372,914	167,847
1988	578,748	167,051	7,027	404,670	47,798	362,903	168,047
1989	630,486	187,594	7,026	435,866	50,985	390,703	188,798
1990	718,917	191,809	7,458	519,650	77,923	447,849	193,145
1991	821,396	188,014	7,592	625,790	125,874	506,177	189,345
1992	1,054,441	190,190	7,925	856,326	221,362	641,750	191,329
1993	1,052,415	185,546	7,106	859,763	236,564	629,246	186,605
1994	943,889	158,603	6,379	778,907	203,688	580,253	159,948
1995	888,633	143,099	5,480	740,054	175,784	568,072	144,777
1996	797,137	125,660	5,293	666,184	144,404	525,350	127,383
1997	676,444	94,764	5,078	576,602	117,090	463,444	95,910
1998	743,121	111,325	6,330	625,466	136,383	490,638	116,100
1999	758,076	120,403	5,906	631,767	140,520	494,609	122,947
2000	750,163	117,567	5,879	626,717	144,136	485,798	120,229
2001	772,775	108,877	5,946	657,952	156,844	504,366	111,565
2002	820,992	113,286	5,753	701,953	170,048	535,507	115,437
2003	827,029	106,484	5,317	715,228	179,566	539,127	108,336
2004	852,052	105,605	5,213	741,234	183,152	561,487	107,413
2005	852,222	111,940	4,881	735,401	177,688	560,960	113,574
2006	838,448	110,264	4,151	724,033	170,453	556,140	111,855
2007	836,642	102,581	3,492	730,569	169,375	563,094	104,173
2008	919,146	106,513	3,987	808,646	181,228	629,697	108,221
2009	999,540	106,917	4,815	887,808	196,745	694,242	108,553
2010	1,042,124	104,902	4,855	932,367	204,219	731,265	106,640

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: Represents period in which first payment was made, not date of entitlement to payments.

a. Persons who were converted in 1973 from the state Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled programs to the SSI program.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 7.A9—Number of recipients of federally administered payments, by eligibility category and age, December 1974–2010

Year	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older
1974	3,996,064	2,285,909	74,616	1,635,539	70,900	1,503,155	2,422,009
1975	4,314,275	2,307,105	74,489	1,932,681	107,026	1,699,394	2,507,855
1976	4,235,939	2,147,697	76,366	2,011,876	125,412	1,713,594	2,396,933
1977	4,237,692	2,050,921	77,362	2,109,409	147,355	1,736,879	2,353,458
1978	4,216,925	1,967,900	76,895	2,171,890	165,899	1,747,126	2,303,900
1979	4,149,575	1,871,716	77,250	2,200,609	177,306	1,726,553	2,245,716
1980	4,142,017	1,807,776	78,401	2,255,840	190,394	1,730,847	2,220,776
1981	4,018,875	1,678,090	78,570	2,262,215	194,890	1,702,895	2,121,090
1982	3,857,590	1,548,741	77,356	2,231,493	191,570	1,655,279	2,010,741
1983	3,901,497	1,515,400	78,960	2,307,137	198,323	1,699,774	2,003,400
1984	4,029,333	1,530,287	80,524	2,418,522	211,587	1,780,459	2,037,287
1985	4,138,021	1,504,469	82,220	2,551,332	227,384	1,879,168	2,031,469
1986	4,269,184	1,473,428	83,115	2,712,641	241,198	2,010,458	2,017,528
1987	4,384,999	1,455,387	83,421	2,846,191	250,902	2,118,710	2,015,387
1988	4,463,869	1,433,420	82,864	2,947,585	255,135	2,202,714	2,006,020
1989	4,593,059	1,439,043	82,765	3,071,251	264,890	2,301,926	2,026,243
1990	4,817,127	1,454,041	83,686	3,279,400	308,589	2,449,897	2,058,641
1991	5,118,470	1,464,684	84,549	3,569,237	397,162	2,641,524	2,079,784
1992	5,566,189	1,471,022	85,400	4,009,767	556,470	2,910,016	2,099,703
1993	5,984,330	1,474,852	85,456	4,424,022	722,678	3,148,413	2,113,239
1994	6,295,786	1,465,905	84,911	4,744,970	841,474	3,335,255	2,119,057
1995	6,514,134	1,446,122	83,545	4,984,467	917,048	3,482,256	2,114,830
1996	6,613,718	1,412,632	82,137	5,118,949	955,174	3,568,393	2,090,151
1997	6,494,985	1,362,350	80,778	5,051,857	879,828	3,561,625	2,053,532
1998	6,566,069	1,331,782	80,243	5,154,044	887,066	3,646,020	2,032,983
1999	6,556,634	1,308,062	79,291	5,169,281	847,063	3,690,970	2,018,601
2000	6,601,686	1,289,339	78,511	5,233,836	846,784	3,744,022	2,010,880
2001	6,688,489	1,264,463	78,255	5,345,771	881,836	3,811,494	1,995,159
2002	6,787,857	1,251,528	77,658	5,458,671	914,821	3,877,752	1,995,284
2003	6,902,364	1,232,778	77,082	5,592,504	959,379	3,953,248	1,989,737
2004	6,987,845	1,211,167	75,924	5,700,754	993,127	4,017,108	1,977,610
2005	7,113,879	1,214,296	75,039	5,824,544	1,036,498	4,082,870	1,994,511
2006	7,235,583	1,211,656	73,418	5,950,509	1,078,977	4,152,130	2,004,476
2007	7,359,525	1,204,512	71,727	6,083,286	1,121,017	4,221,920	2,016,588
2008	7,520,501	1,203,256	70,325	6,246,920	1,153,844	4,333,096	2,033,561
2009	7,676,686	1,185,959	69,302	6,421,425	1,199,788	4,451,288	2,025,610
2010	7,912,266	1,183,853	69,289	6,659,124	1,239,269	4,631,507	2,041,490

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

7.B SSI: State Data

Table 7.B1—Number of recipients of federally administered payments, December 2010, and total payments for calendar year 2010, by state or other area and eligibility category

State or area	Number				Total payments (thousands of dollars) ^a			
	Total	Aged	Blind ^b	Disabled ^c	Total	Aged	Blind	Disabled
All areas ^d	7,912,266	1,183,853	69,289	6,659,124	48,194,514	5,453,906	423,215	42,317,393
Alabama	172,220	12,504	819	158,897	995,569	32,168	4,129	959,273
Alaska	12,242	1,888	94	10,260	70,241	7,181	522	62,538
Arizona	109,877	14,429	891	94,557	644,038	57,868	4,963	581,207
Arkansas	106,745	6,938	698	99,109	602,619	15,861	3,508	583,249
California	1,269,123	359,483	19,598	890,042	8,870,102	2,106,559	148,103	6,615,439
Colorado	65,511	9,005	505	56,001	376,764	38,235	2,659	335,870
Connecticut	58,229	6,603	433	51,193	340,356	29,128	2,380	308,848
Delaware	15,804	1,283	105	14,416	91,438	4,676	546	86,216
District of Columbia	24,371	1,890	127	22,354	153,412	7,250	690	145,473
Florida	484,363	109,256	2,714	372,393	2,759,647	478,816	14,425	2,266,405
Georgia	228,498	24,840	1,878	201,780	1,316,943	77,899	10,194	1,228,850
Hawaii	24,897	6,090	182	18,625	156,557	29,854	1,125	125,577
Idaho	27,236	1,889	206	25,141	155,240	5,825	1,114	148,303
Illinois	273,279	30,432	2,362	240,485	1,661,922	138,324	13,611	1,509,986
Indiana	118,030	5,507	870	111,653	715,565	18,190	4,619	692,754
Iowa	47,634	3,236	698	43,700	266,076	9,837	3,520	252,719
Kansas	45,841	3,164	342	42,335	269,219	11,067	1,879	256,273
Kentucky	192,328	11,039	1,231	180,058	1,115,974	29,457	6,640	1,079,877
Louisiana	174,669	14,037	1,449	159,183	988,821	39,192	7,547	942,082
Maine	35,486	2,002	216	33,268	196,347	5,182	1,141	190,024
Maryland	107,386	14,905	590	91,891	657,803	66,262	3,181	588,360
Massachusetts	192,998	47,020	3,630	142,348	1,211,182	240,240	23,809	947,132
Michigan	253,549	16,515	1,609	235,425	1,581,414	67,936	8,922	1,504,555
Minnesota	86,482	10,415	684	75,383	515,604	48,333	3,924	463,346
Mississippi	125,569	11,016	887	113,666	699,016	26,026	4,331	668,660
Missouri	133,843	7,981	879	124,983	784,569	25,937	4,763	753,870
Montana	17,532	1,291	118	16,123	97,727	3,640	665	93,422
Nebraska	25,675	1,974	238	23,463	144,425	6,470	1,277	136,677
Nevada	41,008	10,068	646	30,294	240,949	42,338	4,188	194,423
New Hampshire	17,915	920	156	16,839	103,454	3,493	837	99,124
New Jersey	168,591	34,340	837	133,414	1,001,475	161,100	4,376	835,998
New Mexico	60,498	8,262	460	51,776	340,065	27,750	2,450	309,865
New York	681,191	131,407	2,878	546,906	4,444,663	665,113	17,219	3,762,332
North Carolina	219,443	20,872	1,718	196,853	1,242,941	57,083	8,926	1,176,934
North Dakota	8,302	781	57	7,464	43,112	2,407	320	40,385
Ohio	285,570	14,769	1,732	269,069	1,784,091	56,623	9,441	1,718,025
Oklahoma	93,721	6,639	676	86,406	540,863	19,465	3,743	517,655
Oregon	74,751	8,616	636	65,499	438,780	34,119	3,529	401,131
Pennsylvania	357,939	25,803	1,967	330,169	2,228,984	102,980	10,879	2,115,125
Rhode Island	32,759	3,493	169	29,097	200,615	14,535	915	185,166
South Carolina	112,010	9,644	1,271	101,095	634,678	26,015	6,547	602,117
South Dakota	13,848	1,455	99	12,294	74,749	4,494	557	69,698
Tennessee	174,503	13,633	1,439	159,431	1,023,042	37,084	7,930	978,027
Texas	616,563	106,895	6,727	502,941	3,315,685	367,229	36,664	2,911,792
Utah	28,079	2,518	240	25,321	160,104	11,021	1,239	147,844
Vermont	15,289	1,033	69	14,187	86,863	2,974	369	83,520
Virginia	148,305	19,009	1,168	128,128	832,411	75,326	6,279	750,806
Washington	137,447	16,245	875	120,327	881,354	81,018	4,993	795,344
West Virginia	80,335	3,136	514	76,685	471,652	8,083	2,721	460,848
Wisconsin	107,476	7,228	853	99,395	624,596	24,847	4,644	595,106
Wyoming	6,369	331	40	5,998	34,823	827	208	33,788
Outlying area								
Northern Mariana Islands	937	124	9	804	5,974	568	51	5,355

SOURCE: Social Security Administration, Office of Financial Policy and Operations; and Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

- a. Totals do not necessarily equal the sum of rounded components.
- b. Includes approximately 14,700 blind persons aged 65 or older.
- c. Includes approximately 842,900 disabled persons aged 65 or older.
- d. Includes data not distributed by state.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 7.B3—Number of recipients of federally administered payments and average monthly payment, by state or other area, December 2010

State or area	Federal SSI		State supplementation	
	Number	Average monthly payment (dollars)	Number	Average monthly payment (dollars)
All areas ^a	7,655,667	478.73	2,385,933	124.29
Alabama	172,220	463.09	...	...
Alaska	12,242	465.43	...	...
Arizona	109,877	489.74	...	...
Arkansas	106,745	466.57	...	...
California	1,091,412	479.72	1,268,211	167.21
Colorado	65,511	466.65	...	...
Connecticut	58,229	482.48	...	...
Delaware	15,690	481.87	665	125.79
District of Columbia	24,233	516.96	1,510	278.43
Florida	484,362	476.47	...	...
Georgia	228,498	465.15	...	...
Hawaii	23,749	486.09	2,785	502.95
Idaho	27,236	467.39	...	...
Illinois	273,279	503.79	...	...
Indiana	118,030	487.35	...	...
Iowa	47,130	452.03	2,106	223.54
Kansas	45,841	468.82	...	...
Kentucky	192,328	476.01	...	...
Louisiana	174,668	480.53	...	...
Maine	35,486	448.46	...	...
Maryland	107,386	497.77	...	...
Massachusetts	177,450	478.99	192,776	79.11
Michigan	250,915	504.41	14,497	121.29
Minnesota	86,482	487.00	...	...
Mississippi	125,568	456.79	...	...
Missouri	133,843	469.23	...	...
Montana	17,470	456.29	1,000	81.31
Nebraska	25,675	453.08	...	...
Nevada	40,338	480.73	10,670	47.89
New Hampshire	17,915	464.52	...	...
New Jersey	161,571	465.82	168,076	45.78
New Mexico	60,498	461.39	...	...
New York	636,354	493.66	663,350	77.23
North Carolina	219,443	450.85	...	...
North Dakota	8,302	423.37	...	...
Ohio	285,570	499.13	...	...
Oklahoma	93,721	474.34	...	...
Oregon	74,751	480.79	...	...
Pennsylvania	354,387	504.54	9,174	360.77
Rhode Island	31,156	481.35	32,712	45.32
South Carolina	112,010	456.02	...	...
South Dakota	13,848	440.68	...	...
Tennessee	174,502	462.86	...	...
Texas	616,563	456.91	...	...
Utah	28,077	474.84	2,534	3.13

(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 2010—Continued

State or area	Federal SSI		State supplementation	
	Number	Average monthly payment (dollars)	Number	Average monthly payment (dollars)
Vermont	14,237	448.81	15,256	53.58
Virginia	148,305	465.78	...	...
Washington	137,447	505.91	...	...
West Virginia	80,335	482.98	...	...
Wisconsin	107,476	479.53	...	...
Wyoming	6,369	449.61	...	...
Outlying area				
Northern Mariana Islands	937	566.90	...	...

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: ... = not applicable.

a. Includes recipients and payments not assigned to a specific state or other area.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 7.B7—Total federally administered payments, by state or other area, 2010 (in thousands of dollars)

State or area	Total	Federal SSI	Federally administered state supplementation
All areas	48,194,514	44,605,122	3,589,392
Alabama	995,569	995,569	...
Alaska	70,241	70,241	...
Arizona	644,038	644,038	...
Arkansas	602,619	602,619	...
California	8,870,102	6,304,739	2,565,363
Colorado	376,764	376,764	...
Connecticut	340,356	340,356	...
Delaware	91,438	90,422	1,016
District of Columbia	153,412	148,888	4,524
Florida	2,759,647	2,759,647	...
Georgia	1,316,943	1,316,943	...
Hawaii	156,557	140,057	16,500
Idaho	155,240	155,240	...
Illinois	1,661,922	1,661,922	...
Indiana	715,565	715,565	...
Iowa	266,076	260,714	5,362
Kansas	269,219	269,219	...
Kentucky	1,115,974	1,115,974	...
Louisiana	988,821	988,821	...
Maine	196,347	196,347	...
Maryland	657,803	657,803	...
Massachusetts	1,211,182	1,025,690	185,492
Michigan	1,581,414	1,560,355	21,059
Minnesota	515,604	515,604	...
Mississippi	699,016	699,016	...
Missouri	784,569	784,569	...
Montana	97,727	96,759	968
Nebraska	144,425	144,425	...
Nevada	240,949	234,769	6,180
New Hampshire	103,454	103,454	...
New Jersey	1,001,475	908,255	93,220
New Mexico	340,065	340,065	...
New York	4,444,663	3,822,828	621,835
North Carolina	1,242,941	1,242,941	...
North Dakota	43,112	43,112	...
Ohio	1,784,091	1,784,091	...
Oklahoma	540,863	540,863	...
Oregon	438,780	438,780	...
Pennsylvania	2,228,984	2,189,271	39,713
Rhode Island	200,615	182,500	18,115
South Carolina	634,678	634,678	...
South Dakota	74,749	74,749	...
Tennessee	1,023,042	1,023,042	...
Texas	3,315,685	3,315,685	...
Utah	160,104	160,020	84
Vermont	86,863	76,902	9,961
Virginia	832,411	832,411	...
Washington	881,354	881,354	...
West Virginia	471,652	471,652	...
Wisconsin	624,596	624,596	...
Wyoming	34,823	34,823	...
Outlying area			
Northern Mariana Islands	5,974	5,974	...

SOURCE: Social Security Administration, Office of Financial Policy and Operations; and Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: ... = not applicable.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

State or area	Total	Blind	Disabled
All areas	1,239,269	5,946	1,233,323
Alabama	30,045	34	30,011
Alaska	1,239	^a	^a
Arizona	20,526	95	20,431
Arkansas	27,009	65	26,944
California	111,206	1,201	110,005
Colorado	8,660	47	8,613
Connecticut	7,950	27	7,923
Delaware	3,626	6	3,620
District of Columbia	4,391	4	4,387
Florida	92,928	161	92,767
Georgia	41,154	222	40,932
Hawaii	1,721	19	1,702
Idaho	5,277	22	5,255
Illinois	44,751	201	44,550
Indiana	25,707	76	25,631
Iowa	7,943	74	7,869
Kansas	8,765	25	8,740
Kentucky	30,328	97	30,231
Louisiana	35,551	87	35,464
Maine	3,900	23	3,877
Maryland	16,889	27	16,862
Massachusetts	23,202	399	22,803
Michigan	41,454	136	41,318
Minnesota	12,984	61	12,923
Mississippi	24,020	50	23,970
Missouri	22,796	76	22,720
Montana	2,523	17	2,506
Nebraska	4,071	23	4,048
Nevada	7,724	86	7,638
New Hampshire	2,400	21	2,379
New Jersey	24,884	43	24,841
New Mexico	9,103	37	9,066
New York	83,532	156	83,376
North Carolina	41,767	151	41,616
North Dakota	1,089	^a	^a
Ohio	48,693	133	48,560
Oklahoma	17,722	64	17,658
Oregon	9,984	62	9,922
Pennsylvania	70,104	118	69,986
Rhode Island	4,607	7	4,600
South Carolina	20,280	138	20,142
South Dakota	2,431	6	2,425
Tennessee	25,042	135	24,907
Texas	129,744	1,228	128,516
Utah	5,295	26	5,269
Vermont	1,861	10	1,851
Virginia	24,082	80	24,002
Washington	17,238	70	17,168
West Virginia	9,193	42	9,151
Wisconsin	20,587	49	20,538
Wyoming	971	^a	^a
Outlying area			
Northern Mariana Islands	320	3	317

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

a. Suppressed to avoid disclosing information about particular individuals.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 7.B9—Number of federally administered awards, by state or other area, eligibility category, and age, 2010

State or area	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older
All areas	1,042,124	104,902	4,855	932,367	204,219	731,265	106,640
Alabama	24,323	841	53	23,429	4,290	19,157	876
Alaska	1,812	a	a	1,659	230	1,432	150
Arizona	14,140	1,532	95	12,513	3,037	9,544	1,559
Arkansas	16,217	578	62	15,577	4,821	10,805	591
California	113,238	29,541	753	82,944	16,167	67,146	29,925
Colorado	11,268	901	66	10,301	1,872	8,477	919
Connecticut	7,916	637	37	7,242	1,421	5,848	647
Delaware	2,255	130	8	2,117	536	1,587	132
District of Columbia	3,631	231	10	3,390	668	2,724	239
Florida	73,164	11,708	262	61,194	15,809	45,509	11,846
Georgia	33,344	2,633	163	30,548	6,045	24,587	2,712
Hawaii	3,266	585	5	2,676	277	2,399	590
Idaho	4,310	218	26	4,066	957	3,130	223
Illinois	32,611	2,803	221	29,587	6,648	23,102	2,861
Indiana	20,707	591	84	20,032	4,257	15,849	601
Iowa	6,939	369	47	6,523	1,472	5,089	378
Kansas	7,970	401	27	7,542	1,779	5,780	411
Kentucky	22,958	1,029	74	21,855	3,934	17,966	1,058
Louisiana	22,511	1,127	107	21,277	5,159	16,200	1,152
Maine	4,273	191	11	4,071	630	3,451	192
Maryland	16,631	1,266	61	15,304	2,950	12,383	1,298
Massachusetts	23,776	2,578	188	21,010	4,380	16,789	2,607
Michigan	38,780	1,878	150	36,752	6,745	30,105	1,930
Minnesota	12,403	942	33	11,428	2,516	8,927	960
Mississippi	15,725	856	96	14,773	3,429	11,422	874
Missouri	22,876	802	62	22,012	4,064	17,996	816
Montana	2,999	411	9	2,579	488	2,098	413
Nebraska	4,400	258	20	4,122	742	3,395	263
Nevada	7,054	938	42	6,074	1,426	4,682	946
New Hampshire	4,148	139	12	3,997	495	3,510	143
New Jersey	22,952	3,395	37	19,520	4,196	15,319	3,437
New Mexico	7,561	696	32	6,833	1,457	5,392	712
New York	68,022	10,223	164	57,635	14,107	43,577	10,338
North Carolina	33,207	2,060	171	30,976	6,125	24,943	2,139
North Dakota	1,261	a	a	1,168	240	925	96
Ohio	43,450	1,546	122	41,782	7,541	34,319	1,590
Oklahoma	13,819	690	48	13,081	3,066	10,049	704
Oregon	11,365	1,036	50	10,279	1,865	8,447	1,053
Pennsylvania	46,655	2,625	141	43,889	12,026	31,933	2,696
Rhode Island	4,038	349	16	3,673	833	2,849	356
South Carolina	17,071	808	122	16,141	3,021	13,219	831
South Dakota	2,021	140	10	1,871	465	1,414	142
Tennessee	27,428	1,279	100	26,049	3,880	22,232	1,316
Texas	92,339	9,101	729	82,509	24,710	58,391	9,238
Utah	4,807	291	24	4,492	1,082	3,427	298
Vermont	2,165	133	6	2,026	305	1,723	137
Virginia	22,002	1,595	130	20,277	3,946	16,437	1,619
Washington	21,563	1,576	60	19,927	3,120	16,843	1,600
West Virginia	7,885	272	25	7,588	1,241	6,361	283
Wisconsin	15,605	668	72	14,865	3,509	11,418	678
Wyoming	1,142	49	5	1,088	176	917	49
Outlying area							
Northern Mariana Islands	118	a	a	101	61	41	16
Unknown	3	0	0	3	3	0	0

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

a. Suppressed to avoid disclosing information about particular individuals.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

Monthly payment (dollars)	All recipients	Adults			Blind and disabled, under age 18
		Aged	Blind	Disabled	
Total					
Number	7,134,082	856,504	55,721	4,984,220	1,237,637
Percent	100.0	100.0	100.0	100.0	100.0
Less than 50	6.7	10.8	7.9	7.2	1.8
50–99	4.5	8.6	5.0	4.8	0.8
100–149	4.3	8.4	4.7	4.5	0.9
150–199	3.7	7.3	3.8	3.7	1.1
200–249	3.3	5.7	3.6	3.3	1.3
250–299	3.2	4.5	3.9	3.3	1.5
300–349	2.7	3.9	2.8	2.7	1.7
350–399	2.5	3.5	2.6	2.5	2.0
400–449	7.8	11.8	9.0	7.3	6.8
450–499	2.0	2.3	1.9	1.7	3.2
500–549	1.8	1.7	1.7	1.3	4.0
550–599	1.9	1.1	1.3	1.2	5.4
600–649	1.8	0.7	1.0	1.1	5.3
650–673	0.9	0.3	0.5	0.6	2.4
674 ^a	52.9	29.4	50.2	54.7	61.8

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

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

a. Individuals living in their own household with no countable income were eligible for a federal SSI payment of \$674 in calendar year 2010.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 7.C2—Number and percentage distribution of couples receiving federal SSI payments, by monthly payment and eligibility category, December 2010

Monthly payment (dollars)	All recipients	Aged	Blind	Disabled
Total				
Number	261,048	121,616	2,257	137,175
Percent	100.0	100.0	100.0	100.0
Less than 50	3.3	3.4	2.8	3.2
50–99	3.8	4.0	2.6	3.7
100–149	3.9	4.0	3.2	3.9
150–199	4.0	4.1	3.5	4.0
200–249	3.8	3.9	3.2	3.8
250–299	3.7	3.6	3.2	3.8
300–349	3.6	3.1	2.8	4.0
350–399	3.4	2.9	3.2	4.0
400–449	3.1	2.7	3.5	3.5
450–499	2.8	2.5	2.8	3.1
500–549	2.4	2.4	2.6	2.5
550–599	2.2	2.2	2.4	2.2
600–649	2.2	2.0	2.5	2.3
650–699	6.3	9.9	4.0	3.1
700–749	1.7	1.6	1.7	1.8
750–799	1.5	1.3	1.6	1.6
800–849	1.2	1.0	1.8	1.2
850–899	0.8	0.8	0.8	0.8
900–949	0.7	0.8	0.7	0.5
950–999	0.7	0.8	0.6	0.5
1,000–1,010	0.1	0.2	0.1	0.1
1,011 ^a	44.7	42.7	50.3	46.4

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

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

a. Couples living in their own household with no countable income were eligible for a federal SSI payment of \$1,011 in calendar year 2010.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

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 2010

Type of income	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older ^a
Number	7,912,266	1,183,853	69,289	6,659,124	1,239,269	4,631,507	2,041,490
Number							
With unearned income							
Social Security benefits	2,697,963	668,457	25,474	2,004,032	92,154	1,458,740	1,147,069
Other	823,807	185,350	6,015	632,442	244,248	330,482	249,077
With earned income	259,688	16,829	3,405	239,454	2,255	230,469	26,964
Percentage							
With unearned income							
Social Security benefits	34.1	56.5	36.8	30.1	7.4	31.5	56.2
Other	10.4	15.7	8.7	9.5	19.7	7.1	12.2
With earned income	3.3	1.4	4.9	3.6	0.2	5.0	1.3
Average income (dollars)							
With unearned income							
Social Security benefits	489.36	476.43	507.06	493.48	212.08	514.51	479.83
Other	164.80	139.52	148.83	172.46	204.87	157.94	134.65
With earned income	277.89	387.52	438.45	267.84	312.30	275.62	294.38

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

NOTE: See section History of Provisions: SSI for discussion of income.

a. Includes approximately 14,700 blind and 842,900 disabled persons aged 65 or older.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

7.D SSI: Other Income Sources

Table 7.D2—Percentage of persons receiving both federally administered payments and Social Security benefits, and average monthly amount of benefits, by state or other area, eligibility category, and age, December 2010

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	34.1	56.5	36.8	30.1	7.4	31.5	56.2	489.36	476.43	507.06	493.48	212.08	514.51	479.83	
Alabama	37.3	84.9	42.1	33.6	9.8	34.4	76.0	482.74	499.91	487.90	479.28	221.65	499.54	488.25	
Alaska	34.0	63.6	42.6	28.5	8.1	27.7	61.3	478.11	474.99	433.42	480.02	216.49	500.59	465.49	
Arizona	31.9	59.6	33.4	27.6	6.7	29.0	58.7	454.64	428.77	445.66	463.31	218.20	489.25	434.61	
Arkansas	36.3	88.1	41.8	32.6	9.4	36.5	80.7	478.21	510.84	461.44	472.13	199.56	498.63	496.63	
California	38.3	51.0	37.9	33.1	5.1	33.9	49.9	536.92	487.51	583.81	566.54	246.92	589.98	502.53	
Colorado	34.7	52.1	38.0	31.9	5.2	33.3	55.7	485.01	471.62	472.97	488.69	231.38	502.31	470.44	
Connecticut	31.3	47.1	33.5	29.3	7.3	30.0	49.2	463.54	441.02	453.19	468.33	200.73	486.63	448.02	
Delaware	30.6	59.4	34.3	28.0	6.6	31.6	61.1	483.69	478.95	497.25	484.46	215.18	506.47	480.33	
District of Columbia	24.0	65.4	34.6	20.4	5.6	20.1	57.8	476.55	464.73	474.23	479.81	251.02	501.71	466.81	
Florida	32.8	49.5	37.5	27.9	7.0	30.8	51.1	458.92	441.79	457.14	467.92	218.14	495.43	446.22	
Georgia	34.6	70.2	36.4	30.2	6.4	30.7	68.5	487.60	492.02	471.63	486.50	226.93	504.34	487.05	
Hawaii	33.4	52.0	34.6	27.3	5.9	25.4	52.5	518.98	490.47	746.54	533.98	228.23	560.19	491.61	
Idaho	35.2	74.5	37.9	32.2	8.3	35.3	72.3	482.43	494.07	481.71	480.40	194.11	501.99	482.57	
Illinois	26.5	44.9	28.6	24.1	6.8	25.2	44.7	457.91	433.64	440.42	463.88	208.96	479.59	451.79	
Indiana	31.3	69.0	37.6	29.3	8.2	33.0	66.5	476.25	484.99	456.84	475.42	201.00	496.27	483.38	
Iowa	38.1	73.2	39.4	35.5	7.6	38.9	69.8	494.84	507.99	480.86	493.05	208.32	507.04	498.49	
Kansas	35.2	63.8	30.7	33.1	8.5	36.7	63.4	490.17	488.33	485.65	490.47	206.50	510.92	485.75	
Kentucky	34.6	80.5	37.0	31.8	10.2	31.1	71.8	469.66	493.80	448.76	466.07	199.39	488.92	472.30	
Louisiana	32.6	80.9	40.1	28.2	7.4	28.9	72.6	467.13	481.69	462.96	463.50	220.82	484.90	471.39	
Maine	42.6	82.5	42.1	40.2	16.4	39.4	77.9	479.95	509.94	456.87	476.39	187.88	492.48	493.47	
Maryland	27.7	43.5	36.3	25.1	6.6	26.0	46.7	472.47	451.58	466.39	478.47	233.62	495.30	462.34	
Massachusetts	36.1	52.1	40.9	30.6	11.5	34.2	51.7	519.63	520.98	543.13	518.05	193.58	539.07	522.73	
Michigan	31.6	52.5	35.9	30.1	8.9	31.8	54.9	484.57	484.88	497.91	484.42	206.68	501.42	488.72	
Minnesota	31.3	42.9	29.8	29.7	8.1	33.1	42.4	473.92	477.24	497.85	473.03	196.64	489.76	475.08	
Mississippi	38.1	89.4	46.1	33.1	8.4	33.8	78.8	480.07	499.51	470.67	475.06	229.96	496.30	484.49	
Missouri	35.2	70.0	41.3	33.0	9.1	35.0	67.5	476.32	490.82	447.15	474.60	199.25	492.19	481.56	
Montana	37.5	63.4	36.4	35.5	7.1	37.0	66.7	490.37	509.31	487.81	487.65	252.68	496.43	498.78	
Nebraska	37.6	67.8	37.0	35.0	6.6	38.3	66.3	492.81	503.05	458.97	491.48	231.62	500.97	498.21	
Nevada	31.5	58.1	33.9	22.6	5.4	28.3	57.4	498.01	497.21	538.40	497.38	224.06	517.46	496.58	
New Hampshire	36.7	55.2	32.1	35.7	17.4	36.5	61.2	487.48	451.09	460.00	490.82	188.69	515.77	477.16	
New Jersey	32.0	43.8	42.2	28.9	6.6	30.2	46.6	486.38	453.29	480.07	499.40	233.32	521.64	464.83	
New Mexico	37.8	74.2	36.7	32.0	7.7	31.4	68.5	455.68	442.13	442.42	460.85	213.08	483.69	443.02	
New York	33.7	51.9	38.6	29.2	6.5	30.1	48.9	512.46	480.26	532.76	526.10	207.07	551.28	489.96	
North Carolina	37.5	79.7	37.4	33.0	7.7	34.4	74.8	483.79	501.83	462.90	479.36	219.29	499.44	487.96	
North Dakota	42.2	72.9	50.9	39.0	7.4	40.6	71.3	477.82	482.24	415.03	477.58	236.07	488.83	472.46	
Ohio	29.2	57.8	34.8	27.6	7.2	29.2	56.6	470.78	471.03	451.38	470.91	203.52	486.52	472.09	
Oklahoma	33.6	78.0	35.1	30.2	8.4	31.6	72.6	467.73	486.52	465.78	463.99	210.02	483.57	474.91	
Oregon	33.6	56.7	35.4	30.5	6.5	31.5	58.0	486.43	470.15	506.19	490.22	227.63	504.20	474.42	
Pennsylvania	28.9	59.5	37.1	26.4	8.6	27.9	55.5	475.52	497.71	476.50	471.59	196.50	493.84	490.99	
Rhode Island	36.7	63.6	45.6	33.5	8.8	34.7	60.9	515.86	524.50	549.18	513.59	202.62	534.98	513.07	
South Carolina	36.5	83.7	39.2	31.9	7.1	32.5	75.4	478.41	488.49	470.97	475.98	229.64	492.99	480.40	
South Dakota	37.8	59.2	30.3	35.3	6.2	38.5	61.9	471.86	510.66	457.55	464.17	217.54	478.66	479.76	
Tennessee	36.7	80.5	36.0	32.9	8.2	32.8	72.7	483.09	498.24	449.64	480.22	216.55	497.89	482.50	
Texas	35.0	67.7	30.8	28.1	6.4	29.6	67.2	454.39	442.01	444.97	460.90	207.16	490.13	442.93	
Utah	30.3	48.5	29.6	28.5	6.0	32.0	52.0	468.25	446.55	491.66	471.77	206.90	490.03	450.09	
Vermont	45.1	81.1	50.7	42.5	13.5	43.1	77.8	519.75	532.92	502.12	518.01	188.76	535.60	523.99	
Virginia	34.4	54.7	37.0	31.4	8.5	32.6	57.7	472.03	470.53	447.29	472.69	210.71	491.48	470.44	
Washington	28.0	35.7	32.5	26.9	6.9	28.3	39.0	480.76	446.64	447.12	487.21	200.59	505.06	457.15	
West Virginia	32.1	82.2	36.8	30.0	10.0	28.5	68.2	471.93	501.78	485.35	468.47	196.22	481.91	482.71	
Wisconsin	34.5	65.5	37.9	32.2	8.0	36.0	62.3	478.52	488.49	471.00	477.11	186.70	494.35	486.41	
Wyoming	37.7	84.6	42.5	35.0	7.0	37.1	78.4	494.51	502.69	461.06	493.67	212.07	507.45	490.34	
Outlying area															
Northern Mariana Islands	20.2	56.5	33.3	14.4	3.4	19.3	55.9	341.02	333.78	511.17	341.06	286.18	363.74	325.94	

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 7.E2—Percentage distribution of federally administered awards, by sex, age, and eligibility category, 2010

Sex and age	Total	Adults			Blind and disabled children ^a
		Aged	Blind	Disabled	
All persons					
Number	1,042,124	104,902	4,019	720,840	212,363
Percent	100.0	100.0	100.0	100.0	100.0
<i>Percentage distribution by sex</i>					
Male	53.5	40.2	55.0	52.1	64.8
Female	46.5	59.8	45.0	47.9	35.2
<i>Percentage distribution by age</i>					
Under 5	8.2	...	...	...	40.4
5-9	5.7	...	...	...	28.0
10-14	3.9	...	...	...	19.1
15-17	1.8	...	...	...	8.7
18-21	5.6	...	14.0	7.0	3.8
22-29	6.4	...	9.5	9.2	...
30-39	9.5	...	12.8	13.7	...
40-49	16.7	...	19.1	24.1	...
50-59	25.9	...	32.2	37.3	...
60-64	6.0	...	10.6	8.5	...
65-69	6.0	57.9	0.7	0.2	...
70-74	2.0	19.4	0.3	b	...
75-79	1.2	11.4	0.4	b	...
80 or older	1.1	11.3	0.4	b	...
Male					
Number	557,904	42,214	2,209	375,770	137,711
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	9.5	...	...	...	38.5
5-9	7.6	...	...	...	30.7
10-14	4.8	...	...	...	19.5
15-17	1.9	...	...	...	7.8
18-21	6.2	...	13.9	7.9	3.5
22-29	6.4	...	8.8	9.5	...
30-39	8.8	...	13.5	13.0	...
40-49	15.7	...	19.1	23.2	...
50-59	25.7	...	32.9	37.9	...
60-64	5.7	...	10.2	8.3	...
65-69	4.6	59.2	0.6	0.2	...
70-74	1.5	20.4	0.3	b	...
75-79	0.9	11.6	0.4	b	...
80 or older	0.7	8.8	0.2	b	...

(Continued)

7.E SSI: Recipient Characteristics

Table 7.E2—Percentage distribution of federally administered awards, by sex, age, and eligibility category, 2010—Continued

Sex and age	Total	Adults			Blind and disabled children ^a
		Aged	Blind	Disabled	
		<i>Female</i>			
Number	484,220	62,688	1,810	345,070	74,652
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	6.8	...	...	...	44.0
5–9	3.5	...	...	...	22.9
10–14	2.8	...	...	...	18.4
15–17	1.6	...	...	...	10.3
18–21	5.0	...	14.2	6.0	4.4
22–29	6.4	...	10.3	8.9	...
30–39	10.4	...	11.9	14.5	...
40–49	17.9	...	19.0	25.0	...
50–59	26.2	...	31.3	36.6	...
60–64	6.3	...	11.0	8.8	...
65–69	7.6	57.0	0.9	0.2	...
70–74	2.4	18.7	0.4	b	...
75–79	1.5	11.3	0.4	b	...
80 or older	1.7	12.9	0.6	b	...

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

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

... = not applicable.

a. Includes students aged 18–21.

b. Less than 0.05 percent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 7.E3—Number and percentage distribution of recipients of federally administered payments, by sex, age, and eligibility category, December 2010

Sex and age	All recipients	Adults			Blind and disabled, under age 18
		Aged	Blind	Disabled	
All persons					
Number	7,912,266	1,183,853	63,343	5,425,801	1,239,269
Percent	100.0	100.0	100.0	100.0	100.0
<i>Percentage distribution by sex</i>					
Male	45.3	33.4	46.0	43.1	66.2
Female	54.7	66.6	54.0	56.9	33.8
<i>Percentage distribution by age</i>					
Under 5	2.5	...	...	...	15.7
5–9	4.6	...	...	...	29.4
10–14	5.4	...	...	...	34.3
15–17	3.2	...	...	...	20.5
18–21	4.6	...	5.9	6.7	...
22–29	7.7	...	12.9	11.1	...
30–39	8.5	...	13.1	12.3	...
40–49	12.8	...	15.8	18.4	...
50–59	17.7	...	20.2	25.5	...
60–64	7.2	...	8.9	10.5	...
65–69	6.8	15.3	6.7	6.5	...
70–74	6.2	21.2	5.3	4.3	...
75–79	5.1	22.1	4.4	2.6	...
80 or older	7.7	41.4	6.9	2.1	...
Male					
Number	3,583,445	395,690	29,123	2,338,420	820,212
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	3.2	...	...	...	13.8
5–9	6.9	...	...	...	30.1
10–14	8.2	...	...	...	35.6
15–17	4.7	...	...	...	20.5
18–21	6.2	...	7.1	9.4	...
22–29	9.3	...	15.0	14.0	...
30–39	8.9	...	14.9	13.5	...
40–49	11.9	...	17.2	18.1	...
50–59	16.4	...	20.5	24.9	...
60–64	6.1	...	8.2	9.2	...
65–69	5.4	17.5	5.8	5.2	...
70–74	4.7	23.8	4.3	3.1	...
75–79	3.7	23.3	3.1	1.7	...
80 or older	4.6	35.4	3.9	1.0	...
Female					
Number	4,328,821	788,163	34,220	3,087,381	419,057
Percent	100.0	100.0	100.0	100.0	100.0
Under 5	1.9	...	...	...	19.4
5–9	2.7	...	...	...	28.2
10–14	3.1	...	...	...	31.8
15–17	2.0	...	...	...	20.6
18–21	3.3	...	4.8	4.6	...
22–29	6.4	...	11.2	8.9	...
30–39	8.2	...	11.7	11.4	...
40–49	13.4	...	14.5	18.7	...
50–59	18.7	...	19.9	26.0	...
60–64	8.2	...	9.4	11.4	...
65–69	8.0	14.1	7.4	7.5	...
70–74	7.4	19.9	6.2	5.2	...
75–79	6.3	21.5	5.5	3.3	...
80 or older	10.2	44.4	9.5	2.9	...

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

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

... = not applicable.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

7.E SSI: Recipient Characteristics

Table 7.E4—Number and percentage distribution of persons with representative payees receiving federally administered payments, by eligibility category and age, December 2010

Category and age	Number			Percentage distribution		
	Total	With representative payee	Without representative payee	Total	With representative payee	Without representative payee
Total	7,912,266	2,994,151	4,918,115	100.0	37.8	62.2
Category						
Aged	1,183,853	46,948	1,136,905	100.0	4.0	96.0
Blind ^a	69,289	19,666	49,623	100.0	28.4	71.6
Disabled ^b	6,659,124	2,927,537	3,731,587	100.0	44.0	56.0
Age						
Under 18	1,239,269	1,238,199	1,070	100.0	99.9	0.1
18–64	4,631,507	1,585,028	3,046,479	100.0	34.2	65.8
65 or older	2,041,490	170,924	1,870,566	100.0	8.4	91.6

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

- a. Includes approximately 14,700 persons aged 65 or older.
b. Includes approximately 842,900 persons aged 65 or older.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 7.E5—Number and percentage distribution of persons receiving federally administered payments, by living arrangement, eligibility category, and age, December 2010

Living arrangement ^a	Number	Category			Age		
		Aged	Blind ^b	Disabled ^c	Under 18	18–64	65 or older
Total							
Number	7,912,266	1,183,853	69,289	6,659,124	1,239,269	4,631,507	2,041,490
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Own household	93.6	90.0	92.2	94.2	95.3	93.7	92.1
Another's household	4.7	8.5	5.8	4.1	3.6	4.6	5.6
Institutional care covered by Medicaid	1.6	1.5	2.0	1.7	1.2	1.5	2.2
Unknown	0.1	0.1	^d	0.1	^d	0.1	^d

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

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

- a. As defined for determination of federal SSI payment standards.
b. Includes approximately 14,700 persons aged 65 or older.
c. Includes approximately 842,900 persons aged 65 or older.
d. Less than 0.05 percent.

CONTACT: (410) 965-0090 or statistics@ssa.gov.

Table 7.E6—Number of noncitizens receiving federally administered payments as a percentage of SSI recipients, by eligibility category, December 1982–2010, selected years

Year	All noncitizens		Aged		Blind and disabled	
	Number	Percentage of total SSI	Number	Percentage of total SSI	Number	Percentage of total SSI
1982	127,900	3.3	91,900	5.9	36,000	1.6
1985	210,800	5.1	146,500	9.7	64,300	2.4
1990	435,600	9.0	282,400	19.4	153,200	4.6
1991	519,660	10.2	329,690	22.5	189,970	5.2
1992	601,430	10.8	372,930	25.4	228,500	5.6
1993	683,150	11.4	416,420	28.2	266,730	5.9
1994	738,140	11.7	440,000	30.0	298,140	6.2
1995	785,410	12.1	459,220	31.8	326,190	6.3
1996	724,990	11.0	417,360	29.5	307,630	5.9
1997	650,830	10.0	367,200	27.0	283,630	5.5
1998	669,630	10.2	364,980	27.4	304,650	5.8
1999	684,930	10.4	368,330	28.2	316,600	6.0
2000	692,590	10.5	364,470	28.3	328,120	6.2
2001	695,650	10.4	364,550	28.9	331,100	6.1
2002	703,515	10.4	364,827	29.1	338,688	6.1
2003	696,772	10.1	356,298	28.9	340,474	6.0
2004	676,979	9.7	342,220	28.3	334,759	5.8
2005	680,397	9.6	344,166	28.3	336,231	5.7
2006	674,250	9.3	339,073	28.0	335,177	5.6
2007	663,210	9.0	330,665	27.5	332,545	5.4
2008	655,988	8.7	324,271	26.9	331,717	5.3
2009	644,966	8.4	316,216	26.7	328,750	5.1
2010	627,271	7.9	303,457	25.6	323,814	4.8

SOURCE: Social Security Administration, Supplemental Security Record (Characteristic Extract Record format), 100 percent data.

CONTACT: (410) 965-0090 or statistics@ssa.gov.



Health Care Programs

Medicare

Trust Funds	8.1
Enrollment, Utilization, and Reimbursement	8.5
Participating Facilities	8.41

Medicaid

Recipients	8.47
State Data	8.51

Table 8.A1—Hospital Insurance, calendar years 1966–2010 (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,b}	Total	Benefit payments ^{b,c}	Administrative expenses		
					Uninsured persons	Military wage credits					Amount ^d	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	^e 803	141	9	746	13,679	13,340	339	2.5	10,605
1977	15,856	14,114	...	^f 214	^e 803	^g 143	12	784	16,019	15,737	283	1.8	10,442
1978	19,213	17,324	...	^f 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	^h 8,164
1983	44,570	37,259	...	358	878	ⁱ 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	^j -719	41	3,362	48,414	47,580	834	1.8	^h 20,499
1986	59,267	54,583	...	364	566	91	43	3,619	50,422	49,758	664	1.3	^h 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	^k -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	^l 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	^m -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	ⁿ 133,990	1,782	1.3	120,419
1999	151,597	132,306	6,552	430	652	71	1,447	10,139	130,632	ⁿ 128,766	1,866	1.4	141,385
2000	167,185	144,351	8,787	465	470	2	1,382	11,729	131,095	ⁿ 128,458	2,636	2.1	177,475
2001	174,630	151,994	7,533	470	453	^o -1,175	1,370	13,986	143,379	ⁿ 141,183	2,195	1.6	208,726
2002	178,631	152,708	8,316	425	442	0	1,626	15,114	152,526	ⁿ 149,944	2,582	1.7	234,831
2003	175,812	149,242	8,318	426	393	0	1,604	15,828	154,616	ⁿ 152,084	2,533	1.7	256,026
2004	183,890	156,484	8,577	419	365	173	1,915	15,956	170,587	167,554	3,033	1.8	269,329
2005	199,374	171,384	8,765	445	286	0	2,416	16,078	182,933	^p 180,013	2,920	1.6	285,770
2006	211,515	181,274	10,319	471	408	0	2,645	16,398	191,933	^p 188,989	2,944	1.6	305,352
2007	223,717	191,855	10,593	483	468	0	2,841	17,477	203,058	^p 200,151	2,907	1.5	326,011
2008	230,815	198,693	11,733	526	506	0	2,938	^q 16,419	235,556	^r 232,299	3,257	1.5	321,270
2009	225,428	190,890	12,376	524	614	^s 968	2,908	17,148	242,478	239,260	3,218	1.3	304,220
2010	215,622	182,032	13,760	535	-142	0	3,310	16,128	247,925	244,463	3,461	1.4	271,918

SOURCE: 2011 Annual Report of the Boards of Trustees of the Federal Hospital Insurance and Federal Supplementary Medical Insurance Trust Funds, Table III.B4, and analogous tables from earlier annual reports. Because the table published in the 2011 Annual Report displays dollars rounded to the tenths of billions for selected years only, an analogous unpublished table displaying dollars rounded to the millions for all years was also used.

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

... = not applicable; HI = Hospital Insurance; SMI = Supplementary Medical Insurance.

- a. Other income includes recoveries of amounts reimbursed from the trust fund that are not obligations of the trust fund, receipts from the fraud and abuse control program (beginning in 1997), and other small amounts of miscellaneous income.
- b. Values after 2005 include additional premiums for Medicare Advantage (MA) plans that are deducted from beneficiaries' Social Security checks. These additional premiums are beneficiary obligations and occur when a beneficiary chooses an MA plan whose monthly plan payment exceeds the benchmark amount. Beneficiaries subject to such premiums may choose to either reimburse the plans directly or have the premiums deducted from their Social Security checks. The premiums deducted from the Social Security checks are transferred to the HI and SMI trust funds and then transferred from the trust funds to the plans.

(Continued)

8.A Medicare: Trust Funds

Table 8.A1—Hospital Insurance, calendar years 1966–2010 (in millions of dollars)—Continued

- c. Includes costs of Peer Review Organizations from 1983 to 2001 (beginning with the implementation of the Prospective Payment System on October 1, 1983) and costs of Quality Improvement Organizations beginning in 2002.
- d. Includes costs of experiments and demonstration projects. Beginning in 1997, includes fraud and abuse control expenses, as provided for by Public Law (P.L.) 104-191.
- e. No transfer was made in 1976 because of the change in transfer dates from December to March. The 1977 transfer was for benefits and administrative expenses during the 15-month period beginning July 1976 and ending September 1977.
- f. No transfer was made in 1977 because of the change in transfer dates from August to June. The 1978 transfer was for contributions during the 15-month period beginning July 1976 and ending September 1977.
- g. Includes \$2 million in reimbursement from general revenues for costs arising from the granting of deemed wage credits to persons of Japanese ancestry who were interned during World War II.
- h. For 1982, assets exclude \$12,437 million loaned to the OASI trust fund under the interfund borrowing provisions of the law. Repayments of \$1,824 million and \$10,613 million were made in 1985 and 1986, respectively.
- i. The lump-sum general revenue transfer, as provided for by section 151 of P.L. 98-21.
- j. Includes the lump-sum general revenue adjustment of -\$805 million, as provided for by section 151 of P.L. 98-21.
- k. Includes the lump-sum general revenue adjustment of -\$1,100 million, as provided for by section 151 of P.L. 98-21.
- l. Includes \$1,805 million transfer from the SMI catastrophic coverage reserve fund, as provided for by P.L. 102-394.
- m. Includes the lump-sum general revenue adjustment of -\$2,366 million, as provided for by section 151 of P.L. 98-21.
- n. Includes monies transferred to the SMI trust fund for home health agency costs, as provided for by P.L. 105-33.
- o. Includes the lump-sum general revenue adjustment of -\$1,177 million, as provided for by section 151 of P.L. 98-21.
- p. Certain HI hospice costs were misallocated to, and paid from, the Part B account of the SMI trust fund. See also footnote r.
- q. Includes an adjustment of -\$853 million for interest inadvertently earned as a result of HI hospice costs that were misallocated to, and paid from, the Part B account of the SMI trust fund from May 2005 to September 2007.
- r. Benefit payments were \$223,815 million. Amount shown includes a transfer of \$8,484 million to the general fund of the Treasury for HI hospice costs that were misallocated to, and paid from, the Part B account of the SMI trust fund from May 2005 to September 2007. (The general fund, in turn, transferred \$8,484 million to the Part B account.)
- s. Includes the lump-sum general revenue adjustment of \$968 million, as provided for by section 151 of P.L. 98-21.

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Table 8.A2—Supplementary Medical Insurance, calendar years 1966–2010 (in millions of dollars)

Year	Receipts						Expenditures						Trust fund assets at end of year ^a
	Total	Premiums from participants ^b				Government contributions ^c	Transfers from states ^d	Interest and other income ^{e,f}	Total	Benefit payments ^{f,g,h}	Administrative expenses		
		Subtotal	Part B		Part D ^b						Amount	Percentage of benefit payments	
			Aged	Disabled									
1966	324	322	322	...	...	0	...	2	203	128	75	58.6	122
1967	1,597	640	640	...	...	933	...	24	1,307	1,197	110	9.2	412
1968	1,711	832	832	...	...	858	...	21	1,702	1,518	184	12.1	421
1969	1,839	914	914	...	...	907	...	18	2,061	1,865	196	10.5	199
1970	2,201	1,096	1,096	...	...	1,093	...	12	2,212	1,975	237	12.0	188
1971	2,639	1,302	1,302	...	...	1,313	...	24	2,377	2,117	260	12.3	450
1972	2,808	1,382	1,382	...	...	1,389	...	37	2,614	2,325	289	12.4	643
1973	3,312	1,550	1,491	59	...	1,705	...	57	2,844	2,526	318	12.6	1,111
1974	4,124	1,804	1,664	140	...	2,225	...	95	3,728	3,318	410	12.4	1,506
1975	4,673	1,918	1,759	158	...	2,648	...	107	4,735	4,273	462	10.8	1,444
1976	5,977	2,060	1,878	183	...	3,810	...	107	5,622	5,080	542	10.7	1,799
1977	7,805	2,247	2,030	217	...	5,386	...	172	6,505	6,038	467	7.7	3,099
1978	9,056	2,470	2,221	248	...	6,287	...	299	7,755	7,252	503	6.9	4,400
1979	9,768	2,719	2,451	267	...	6,645	...	404	9,265	8,708	557	6.4	4,902
1980	10,874	3,011	2,707	304	...	7,455	...	408	11,245	10,635	610	5.7	4,530
1981	15,374	ⁱ 3,722	ⁱ 3,356	ⁱ 366	...	ⁱ 11,291	...	361	14,028	13,113	915	7.0	5,877
1982	16,580	ⁱ 3,697	ⁱ 3,341	ⁱ 356	...	ⁱ 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	^j 7,409	^j 6,747	^j 661	...	^j 23,560	...	876	31,740	30,820	921	3.0	8,394
1988	35,825	^j 8,761	^j 7,983	^j 778	...	^j 26,203	...	861	35,229	33,970	1,260	3.7	8,990
1989	^k 44,349	^{k,l} 12,263	9,793	993	...	30,852	...	^k 1,234	^k 39,783	38,294	^k 1,489	3.9	^k 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	^m 14,077	^m 12,814	^m 1,263	...	^m 41,359	...	1,801	50,830	49,260	1,570	3.2	24,235
1993	57,679	^m 14,193	^m 12,731	^m 1,462	...	^m 41,465	...	2,021	57,783	ⁿ 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	^o 20,933	^o 18,594	^o 2,338	...	^o 64,068	...	2,711	77,630	^p 76,125	1,505	2.0	46,212
1999	80,902	^o 18,967	^o 16,604	^o 2,362	...	^o 59,095	...	2,841	82,327	^p 80,724	1,603	2.0	44,787
2000	89,903	20,555	17,892	2,664	...	65,898	...	3,450	90,663	^p 88,893	1,770	2.0	44,027
2001	98,629	22,764	19,905	2,859	...	72,793	...	3,071	101,386	^p 99,663	1,723	1.7	41,270
2002	106,196	25,066	21,610	3,456	...	78,338	...	2,792	113,165	^p 110,969	2,196	2.0	34,301
2003	115,796	27,402	23,546	3,856	...	86,402	...	1,992	126,144	^p 123,825	2,318	1.9	23,953
2004	133,787	31,435	26,737	4,699	...	100,858	...	1,495	138,311	135,418	2,893	2.1	19,430
2005	158,089	37,535	31,722	5,813	...	119,189	...	1,365	153,511	^q 150,326	3,185	2.1	24,008
2006	225,525	^r 46,337	36,346	6,507	^r 3,484	171,910	5,474	1,804	216,414	^{q,r} 213,045	3,369	1.6	33,119
2007	238,373	^s 50,808	39,676	7,096	^s 4,036	178,404	6,907	2,254	228,629	^{q,s} 225,228	3,401	1.5	42,863
2008	249,986	^t 55,222	42,335	7,897	^t 4,990	184,055	7,105	^u 3,604	232,556	^{t,v} 229,287	3,269	1.4	60,293
2009	282,808	^{w,x} 62,324	^w 47,433	^w 8,606	^{w,x} 6,284	209,818	7,572	3,096	266,498	^x 263,038	3,460	1.3	76,603
2010	270,405	^{w,y} 58,448	^w 43,168	^w 8,818	^{w,y} 6,463	204,630	4,038	3,288	274,879	^y 271,364	3,515	1.3	72,130

SOURCES: 2011 Annual Report of the Boards of Trustees of the Federal Hospital Insurance and Federal Supplementary Medical Insurance Trust Funds, Table III.C1, analogous tables from earlier annual reports, and unpublished Treasury reports. Because the table published in the 2011 Annual Report displays dollars rounded to the tenths of billions for selected years only, an analogous unpublished table displaying dollars rounded to the millions for all years was also used.

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

... = not applicable; SMI = Supplementary Medical Insurance; HI = Hospital Insurance.

- The financial status of SMI depends on both the assets and the liabilities of the trust fund.
- For Part D, premiums include both amounts withheld from Social Security benefit checks (and certain other Federal benefit payments) and amounts paid directly to Part D plans; the premiums paid directly to Part D plans are not displayed on Treasury statements and are estimated.
- For Part B, includes matching payments from the general fund, plus certain interest-adjustment items. For Part D, includes all federal government transfers, including amounts for the general subsidy, reinsurance, employer drug subsidy, low-income subsidy, administrative expenses, risk sharing, and state expenses for making low-income eligibility determinations. Includes amounts for the transitional assistance benefits in 2004–2007.

(Continued)

8.A Medicare: Trust Funds

Table 8.A2—Supplementary Medical Insurance, calendar years 1966–2010 (in millions of dollars)—Continued

- d. With the availability of Part D drug coverage and low-income subsidies beginning in 2006, Medicaid is no longer the primary payer for full-benefit dual eligibles. States are subject to a contribution requirement and must pay the Part D account in the SMI trust fund a portion of their estimated forgone drug costs for this population. Starting in 2006, states must pay 90 percent of the estimated costs, with this percentage phasing down over a 10-year period, to 75 percent in 2015 and later.
- e. Other income includes recoveries of amounts reimbursed from the trust fund that are not obligations of the trust fund and other small amounts of miscellaneous income.
- f. Values after 2005 include additional premiums for Medicare Advantage (MA) plans that are deducted from beneficiaries' Social Security checks. These additional premiums are beneficiary obligations and occur when a beneficiary chooses an MA plan whose monthly plan payment exceeds the benchmark amount. Beneficiaries subject to such premiums may choose either to reimburse the plans directly or have the premiums deducted from their Social Security checks. The premiums deducted from the Social Security checks are transferred to the HI and SMI trust funds and then transferred from the trust funds to the plans.
- g. Includes costs of Peer Review Organizations from 1983 to 2001 and costs of Quality Improvement Organizations beginning in 2002.
- h. For Part D, includes payments to plans, subsidies to employer-sponsored retiree prescription drug plans, payments to states for making low-income eligibility determinations, Part D drug premiums collected from beneficiaries and transferred to Medicare Advantage plans and private drug plans, and premium amounts paid directly by enrollees to plans. (The last item is on an estimated basis; see footnote b.) Includes amounts for the transitional assistance benefits in 2004–2007.
- i. Section 708 of Title VII of the Social Security Act modifies 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 3, 1982 occurred on December 31, 1981. Consequently, the SMI premiums withheld from the checks (\$264 million) and the associated general revenue contributions (\$883 million) were added to the SMI trust fund on December 31, 1981. These amounts are excluded from the premium income and general revenue income for calendar year 1982.
- j. Delivery of benefit checks normally due January 3, 1988 occurred on December 31, 1987. Consequently, the SMI premiums withheld from the checks (\$692 million) and the associated general revenue contributions (\$2,178 million) were added to the SMI trust fund on December 31, 1987. These amounts are excluded from the premium income and general revenue income for calendar year 1988 (see footnote i).
- k. Includes the impact of the Medicare Catastrophic Coverage Act of 1988 as provided for by Public Law (P.L.) 100-360.
- l. Includes \$1,477 million in catastrophic coverage premiums not distributed between aged and disabled enrollees. These premiums were transferred from the HI Catastrophic Coverage Reserve Fund, which was created by the Medicare Catastrophic Coverage Act of 1988. The Medicare Catastrophic Coverage Repeal Act of 1989 mandated that this fund be discontinued and the balance transferred to the SMI trust fund.
- m. Delivery of benefit checks normally due January 3, 1993 occurred on December 31, 1992. Consequently, the SMI premiums withheld from the checks (\$1,089 million) and the associated general revenue contributions (\$3,175 million) were added to the SMI trust fund on December 31, 1992. These amounts are excluded from the premium income and general revenue income for calendar year 1993 (see footnote i).
- n. Includes the impact of the transfer to the Hospital Insurance (HI) trust fund of the SMI catastrophic coverage reserve fund on March 31, 1993, as specified in P.L. 102-394. Actual benefit payments for 1993 were \$53,979 million, and the amount transferred was \$1,805 million.
- o. Delivery of benefit checks normally due January 3, 1999 occurred on December 31, 1998. Consequently, the SMI premiums withheld from the checks (\$1,512 million) and the associated general revenue contributions (\$4,711 million) were added to the SMI trust fund on December 31, 1998. These amounts are excluded from the premium income and general revenue income for calendar year 1999 (see footnote i).
- p. Benefit payments less monies transferred from the HI trust fund for home health agency costs, as provided for by P.L. 105-33.
- q. Certain HI hospice costs were misallocated to, and paid from, the Part B account of the SMI trust fund. See also footnote v.
- r. Includes an estimated \$2,299 million for premiums paid directly to Part D plans. See also footnotes b and h.
- s. Includes an estimated \$2,369 million for premiums paid directly to Part D plans. See also footnotes b and h.
- t. Includes an estimated \$3,117 million for premiums paid directly to Part D plans. See also footnotes b and h.
- u. Includes an adjustment of \$812 million for interest inadvertently not earned as a result of HI hospice costs that were misallocated to, and paid from, the Part B account of the SMI trust fund from May 2005 to September 2007.
- v. Benefit payments were \$237,770 million. Amount shown includes -\$8,484 million, which represents a transfer from the general fund of the Treasury to the Part B account of the SMI trust fund for HI hospice costs that were misallocated to, and paid from, the Part B account from May 2005 to September 2007. (The HI trust fund, in turn, transferred \$8,484 million to the general fund.)
- w. Delivery of benefit checks normally due January 3, 2010 occurred on December 31, 2009. Consequently, the SMI premiums withheld from the checks (\$3,790 million, consisting of \$3,594 million for Part B and \$196 million for Part D) and the associated general revenue contributions (\$10,175 million, all attributable to Part B) were added to the SMI trust fund on December 31, 2009. These amounts are excluded from the premium income and general revenue income for calendar year 2010 (see footnote i).
- x. Includes an estimated \$3,805 million for premiums paid directly to Part D plans. See also footnotes b and h.
- y. Includes an estimated \$4,313 million for premiums paid directly to Part D plans. See also footnotes b and h.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B0—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Total persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1990–2009

Type of coverage and service	1990	1995	2000	2005	2008	2009
<i>Persons enrolled (fee-for-service and managed care) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	34,203	37,535	39,632	42,500	45,412	46,521
Hospital Insurance	33,719	37,135	39,211	42,129	45,067	46,195
Supplementary Medical Insurance	32,629	35,685	37,369	39,730	42,020	42,960
<i>Persons enrolled (fee-for-service only) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	--	--	32,740	36,685	35,320	35,360
Hospital Insurance	--	--	32,329	36,318	34,982	35,041
Supplementary Medical Insurance	--	--	30,478	33,916	31,929	31,800
<i>Persons served (thousands)^a</i>						
Hospital Insurance and/or Supplementary Medical Insurance	27,099	30,423	29,583	33,506	^b 32,058	31,922
Hospital Insurance	7,036	8,036	7,325	8,307	7,843	7,722
Inpatient hospital	6,543	6,964	6,917	7,710	7,097	6,942
Skilled nursing services	638	1,233	1,468	1,847	1,841	1,808
Home health services ^c	1,936	3,427	1,444	1,752	1,705	1,710
Hospice services	--	--	541	871	1,048	1,085
Supplementary Medical Insurance	26,951	30,249	29,313	33,201	31,663	31,473
Physicians' and other medical services	26,350	26,539	28,763	32,709	31,114	30,971
Outpatient services	15,511	19,709	21,029	24,423	23,323	23,303
Home health services ^c	38	41	1,190	1,370	1,614	1,746
<i>Persons served per 1,000 enrollees</i>						
Hospital Insurance and/or Supplementary Medical Insurance	792	811	904	913	908	903
Hospital Insurance	209	216	227	229	224	220
Inpatient hospital	194	188	214	212	203	198
Skilled nursing services	19	33	45	51	53	52
Home health services ^c	57	92	45	48	49	49
Hospice services	--	--	17	24	30	31
Supplementary Medical Insurance	826	848	962	979	992	990
Physicians' and other medical services	808	744	944	964	974	974
Outpatient services	475	552	690	720	730	733
Home health services ^c	1	1	39	40	51	55
<i>Amount reimbursed (millions of dollars)^d</i>						
Hospital Insurance and/or Supplementary Medical Insurance	101,419	158,980	174,261	274,143	301,136	318,009
Hospital Insurance	62,347	101,835	101,663	149,392	162,370	170,331
Inpatient hospital	56,716	78,944	85,197	116,647	120,251	125,662
Skilled nursing services	1,971	7,799	10,621	18,964	24,360	25,580
Home health services ^c	3,660	15,092	2,918	5,916	6,629	6,992
Hospice services	--	--	2,927	7,864	11,130	12,097
Supplementary Medical Insurance	39,072	57,145	72,599	124,752	138,766	147,677
Physicians' and other medical services	30,222	41,617	51,474	83,838	88,155	91,174
Outpatient services	8,773	15,328	16,787	33,931	40,140	44,596
Home health services ^c	78	200	4,338	6,982	10,472	11,908
<i>Amount reimbursed per person served (dollars)^d</i>						
Hospital Insurance and/or Supplementary Medical Insurance	3,743	5,226	5,891	8,182	9,393	9,962
Hospital Insurance	8,862	12,672	13,878	17,984	20,704	22,059
Inpatient hospital	8,668	11,336	12,318	15,130	16,945	18,101
Skilled nursing services	3,092	6,325	7,235	10,267	13,231	14,146
Home health services ^c	1,890	4,403	2,021	3,377	3,889	4,090
Hospice services	--	--	5,409	9,027	10,620	11,146
Supplementary Medical Insurance	1,450	1,889	2,477	3,757	4,383	4,692
Physicians' and other medical services	1,147	1,409	1,709	2,563	2,833	2,944
Outpatient services	566	778	798	1,389	1,721	1,914
Home health services ^c	2,031	4,837	3,644	5,098	6,487	6,822

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B0—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Total persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1990–2009—Continued

Type of coverage and service	1990	1995	2000	2005	2008	2009
	<i>Amount reimbursed per enrollee (dollars)^d</i>					
Hospital Insurance and/or Supplementary Medical Insurance	2,965	4,236	5,323	7,473	8,526	8,993
Hospital Insurance	1,849	2,742	3,145	4,113	4,642	4,861
Inpatient hospital	1,682	2,126	2,635	3,212	3,438	3,586
Skilled nursing services	58	210	329	522	696	730
Home health services ^c	109	406	90	163	189	200
Hospice services	--	--	91	217	318	345
Supplementary Medical Insurance	1,197	1,601	2,382	3,678	4,346	4,644
Physicians' and other medical services	926	1,166	1,689	2,472	2,761	2,867
Outpatient services	269	430	551	1,000	1,257	1,402
Home health services ^c	2	6	142	206	328	374

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Measurement of the use of services represents those persons receiving a reimbursed service under the original (or fee-for-service) Medicare plan. Amount reimbursed represents payments recorded on fee-for-service claims only and excludes nonbilling reimbursements, such as end-of-year cost settlements and premiums paid to managed care plans. For all years, total enrollment as of July 1 in the original (or fee-for-service) Medicare program as well as those enrolled in alternative prepaid plans, such as Medicare managed care, are shown. Beginning in 2000, data for the original fee-for-service enrollment population are shown separately, as they provide a more accurate population for denominators for computing persons served per 1,000 enrollees and average fee-for-service reimbursement per enrollee.

Characterizations of persons enrolled and persons served may differ slightly from those in other tables in this section because of differences in sources and methodology.

-- = not available.

- a. Does not reflect beneficiaries who received covered services, but for whom no program payments were reported. Totals by type of service do not equal the sum of components because one beneficiary may have used several types of services.
- b. Revised data.
- c. 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.
- d. Because of retroactive effective dates for certain provisions of the Patient Protection and Affordable Care Act (Public Law 111-148), data on reimbursements for inpatient hospital and outpatient services for 2009 are subject to revision.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B1—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Aged persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1990–2009

Type of coverage and service	1990	1995	2000	2005	2008	2009
<i>Persons enrolled (fee-for-service and managed care) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	30,948	33,142	34,261	35,777	37,896	38,765
Hospital Insurance	30,464	32,742	33,841	35,407	37,552	38,440
Supplementary Medical Insurance	29,685	31,742	32,602	33,780	35,364	36,061
<i>Persons enrolled (fee-for-service only) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	--	--	27,833	30,399	28,961	28,925
Hospital Insurance	--	--	27,422	30,033	28,624	28,607
Supplementary Medical Insurance	--	--	26,174	28,402	26,430	26,221
<i>Persons served (thousands)^a</i>						
Hospital Insurance and/or Supplementary Medical Insurance	24,809	27,379	25,486	28,071	^b 26,499	26,250
Hospital Insurance	6,367	7,147	6,361	7,016	6,559	6,409
Inpatient hospital	5,906	6,148	5,975	6,455	5,858	5,677
Skilled nursing services	615	1,186	1,390	1,719	1,703	1,662
Home health services ^c	1,818	3,185	1,325	1,574	1,514	1,509
Hospice services	--	--	514	825	995	1,027
Supplementary Medical Insurance	24,687	27,234	25,256	27,816	26,161	25,866
Physicians' and other medical services	24,193	26,621	24,846	27,468	25,779	25,519
Outpatient services	14,055	17,597	18,159	20,436	19,197	19,062
Home health services ^c	38	42	1,081	1,214	1,409	1,515
<i>Persons served per 1,000 enrollees</i>						
Hospital Insurance and/or Supplementary Medical Insurance	802	826	916	923	915	908
Hospital Insurance	209	218	232	234	229	224
Inpatient hospital	194	188	218	215	205	198
Skilled nursing services	21	36	51	57	59	58
Home health services ^c	60	97	48	52	53	53
Hospice services	--	--	19	27	35	36
Supplementary Medical Insurance	832	858	965	979	990	986
Physicians' and other medical services	815	839	949	967	975	973
Outpatient services	474	554	694	720	726	727
Home health services ^c	1	1	41	43	53	58
<i>Amount reimbursed (millions of dollars)^d</i>						
Hospital Insurance and/or Supplementary Medical Insurance	88,778	138,948	148,488	227,594	247,118	258,546
Hospital Insurance	54,244	89,631	87,549	125,993	135,473	140,673
Inpatient hospital	48,952	68,213	72,041	95,557	96,462	99,460
Skilled nursing services	1,886	7,504	10,066	17,666	22,519	23,530
Home health services ^c	3,406	13,914	2,679	5,333	5,927	6,219
Hospice services	--	--	2,763	7,436	10,565	11,464
Supplementary Medical Insurance	34,533	49,317	60,939	101,601	111,646	117,874
Physicians' and other medical services	27,379	37,069	44,506	70,111	72,967	74,780
Outpatient services	7,077	12,045	12,588	25,385	29,659	32,878
Home health services ^c	78	203	3,845	6,106	9,020	10,216
<i>Amount reimbursed per person served (dollars)^d</i>						
Hospital Insurance and/or Supplementary Medical Insurance	3,578	5,075	5,826	8,108	9,326	9,849
Hospital Insurance	8,520	12,542	13,763	17,958	20,656	21,951
Inpatient hospital	8,289	11,096	12,057	14,804	16,468	17,521
Skilled nursing services	3,068	6,325	7,242	10,277	13,223	14,155
Home health services ^c	1,874	4,368	2,022	3,388	3,914	4,120
Hospice services	--	--	5,375	9,015	10,623	11,157
Supplementary Medical Insurance	1,399	1,811	2,413	3,653	4,268	4,557
Physicians' and other medical services	1,132	1,392	1,791	2,552	2,831	2,930
Outpatient services	503	684	693	1,242	1,545	1,725
Home health services ^c	2,033	4,862	3,557	5,030	6,401	6,742

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B1—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Aged persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1990–2009—Continued

Type of coverage and service	1990	1995	2000	2005	2008	2009
	<i>Amount reimbursed per enrollee (dollars)^d</i>					
Hospital Insurance and/or Supplementary Medical Insurance	2,869	4,193	5,335	7,487	8,533	8,938
Hospital Insurance	1,781	2,738	3,193	4,195	4,733	4,917
Inpatient hospital	1,607	2,083	2,627	3,182	3,370	3,477
Skilled nursing services	62	229	367	588	787	823
Home health services ^c	112	425	98	178	207	217
Hospice services	--	--	101	248	369	401
Supplementary Medical Insurance	1,163	1,554	2,328	3,577	4,224	4,495
Physicians' and other medical services	922	1,168	1,700	2,469	2,761	2,852
Outpatient services	238	379	481	894	1,122	1,254
Home health services ^c	3	6	147	215	341	390

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Measurement of the use of services represents those persons receiving a reimbursed service under the original (or fee-for-service) Medicare plan. Amount reimbursed represents payments recorded on fee-for-service claims only and excludes nonbilling reimbursements, such as end-of-year cost settlements and premiums paid to managed care plans. For all years, total enrollment as of July 1 in the original (or fee-for-service) Medicare program as well as those enrolled in alternative prepaid plans, such as Medicare managed care, are shown. Beginning in 2000, data for the original fee-for-service enrollment population are shown separately, as they provide a more accurate population for denominators for computing persons served per 1,000 enrollees and average fee-for-service reimbursement per enrollee.

Characterizations of persons enrolled and persons served may differ slightly from those in other tables in this section because of differences in sources and methodology.

-- = not available.

- a. Does not reflect beneficiaries who received covered services, but for whom no program payments were reported. Totals by type of service do not equal the sum of components because one beneficiary may have used several types of services.
- b. Revised data.
- c. 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.
- d. Because of retroactive effective dates for certain provisions of the Patient Protection and Affordable Care Act (Public Law 111-148), data on reimbursements for inpatient hospital and outpatient services for 2009 are subject to revision.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B2—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Disabled persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1990–2009

Type of coverage and service	1990	1995	2000	2005	2008	2009
<i>Persons enrolled (fee-for-service and managed care) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	3,255	4,393	5,371	6,723	7,516	7,755
Hospital Insurance	3,255	4,393	5,370	6,722	7,515	7,755
Supplementary Medical Insurance	2,943	3,942	4,768	5,951	6,655	6,900
<i>Persons enrolled (fee-for-service only) (thousands)</i>						
Hospital Insurance and/or Supplementary Medical Insurance	--	--	4,907	6,286	6,359	6,435
Hospital Insurance	--	--	4,907	6,285	6,358	6,434
Supplementary Medical Insurance	--	--	4,304	5,514	5,498	5,579
<i>Persons served (thousands)^a</i>						
Hospital Insurance and/or Supplementary Medical Insurance	2,390	3,333	4,096	5,436	^b 5,559	5,672
Hospital Insurance	680	933	964	1,291	1,284	1,313
Inpatient hospital	644	844	942	1,255	1,239	1,266
Skilled nursing services	23	54	78	128	138	146
Home health services ^c	122	272	119	178	191	200
Hospice services	--	--	27	46	54	58
Supplementary Medical Insurance	2,365	3,299	4,057	5,384	5,502	5,607
Physicians' and other medical services	2,249	3,184	3,917	5,241	5,335	5,451
Outpatient services	1,496	2,281	2,870	3,987	4,126	4,241
Home health services ^c	^d	^d	110	156	205	230
<i>Persons served per 1,000 enrollees</i>						
Hospital Insurance and/or Supplementary Medical Insurance	734	759	835	865	874	881
Hospital Insurance	209	212	196	205	202	204
Inpatient hospital	198	192	192	200	195	197
Skilled nursing services	7	12	16	20	22	23
Home health services ^c	38	62	24	28	30	31
Hospice services	--	--	6	7	8	9
Supplementary Medical Insurance	804	837	943	976	1,001	1,005
Physicians' and other medical services	764	808	910	950	970	977
Outpatient services	508	579	667	723	750	760
Home health services ^c	^d	^d	26	28	37	41
<i>Amount reimbursed (millions of dollars)^e</i>						
Hospital Insurance and/or Supplementary Medical Insurance	11,239	21,024	25,773	46,550	54,018	59,462
Hospital Insurance	6,694	12,752	14,114	23,399	26,897	29,659
Inpatient hospital	6,346	11,079	13,156	21,091	23,788	26,202
Skilled nursing services	85	374	555	1,297	1,841	2,050
Home health services ^c	264	1,300	239	583	703	773
Hospice services	--	--	164	428	566	633
Supplementary Medical Insurance	4,545	8,272	11,660	23,151	27,121	29,804
Physicians' and other medical services	2,831	4,888	6,968	13,727	15,187	16,394
Outpatient services	1,714	3,384	4,198	8,547	10,481	11,717
Home health services ^c	^d	^d	493	877	1,452	1,692
<i>Amount reimbursed per person served (dollars)^e</i>						
Hospital Insurance and/or Supplementary Medical Insurance	4,703	6,308	6,292	8,563	9,717	10,484
Hospital Insurance	9,847	13,666	14,641	18,124	20,950	22,588
Inpatient hospital	9,849	13,126	13,966	16,808	19,201	20,698
Skilled nursing services	3,702	6,959	7,115	10,127	13,328	14,046
Home health services ^c	2,156	4,777	2,008	3,280	3,686	3,859
Hospice services	--	--	6,074	9,223	10,561	10,947
Supplementary Medical Insurance	1,922	2,507	2,874	4,229	4,929	5,315
Physicians' and other medical services	1,259	1,535	1,779	2,619	2,847	3,007
Outpatient services	1,146	1,483	1,463	2,144	2,540	2,763
Home health services ^c	^d	^d	4,482	5,631	7,084	7,342

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B2—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Disabled persons enrolled, served, and amount reimbursed, by type of coverage and service, selected years 1990–2009—Continued

Type of coverage and service	1990	1995	2000	2005	2008	2009
	<i>Amount reimbursed per enrollee (dollars) ^e</i>					
Hospital Insurance and/or Supplementary Medical Insurance	3,453	4,786	5,252	7,405	8,495	9,241
Hospital Insurance	2,057	2,903	2,876	3,723	4,230	4,610
Inpatient hospital	1,950	2,522	2,681	3,356	3,741	4,072
Skilled nursing services	26	85	113	206	290	319
Home health services ^c	81	296	49	93	111	120
Hospice services	--	--	33	68	89	98
Supplementary Medical Insurance	1,544	2,098	2,709	4,199	4,933	5,342
Physicians' and other medical services	962	1,240	1,619	2,489	2,762	2,938
Outpatient services	582	858	975	1,550	1,906	2,100
Home health services ^c	^d	^d	115	159	264	303

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Measurement of the use of services represents those persons receiving a reimbursed service under the original (or fee-for-service) Medicare plan. Amount reimbursed represents payments recorded on fee-for-service claims only and excludes nonbilling reimbursements, such as end-of-year cost settlements and premiums paid to managed care plans. For all years, total enrollment as of July 1 in the original (or fee-for-service) Medicare program as well as those enrolled in alternative prepaid plans, such as Medicare managed care, are shown. Beginning in 2000, data for the original fee-for-service enrollment population are shown separately, as they provide a more accurate population for denominators for computing persons served per 1,000 enrollees and average fee-for-service reimbursement per enrollee.

Characterizations of persons enrolled and persons served may differ slightly from those in other tables in this section because of differences in sources and methodology.

-- = not available.

- a. Does not reflect beneficiaries who received covered services, but for whom no program payments were reported. Totals by type of service do not equal the sum of components because one beneficiary may have used several types of services.
- b. Revised data.
- c. 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.
- d. Sample population too small to yield valid calculated results.
- e. Because of retroactive effective dates for certain provisions of the Patient Protection and Affordable Care Act (Public Law 111-148), data on reimbursements for inpatient hospital and outpatient services for 2009 are subject to revision.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3a—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of fee-for-service and managed care enrollees aged 65 or older, by census division and state or other area, July 1, 1990–2010, selected years (in thousands)

Census division and state or area	1990			2000			2009			2010		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Total												
All areas	30,939	30,255	684	34,247	27,840	6,407	38,765	28,925	9,840	39,631	29,291	10,340
United States ^a	30,341	29,657	684	33,540	27,137	6,403	37,899	28,365	9,534	38,742	28,736	10,006
New England	1,733	1,719	15	1,836	1,449	387	1,961	1,577	384	1,996	1,595	401
Connecticut	436	434	2	457	356	101	482	394	88	489	393	96
Maine	165	165	^b	180	178	2	205	179	26	209	178	31
Massachusetts	795	786	9	828	601	227	860	667	193	875	679	196
New Hampshire	126	126	^b	147	145	2	178	164	14	183	167	16
Rhode Island	145	141	3	148	94	54	147	88	59	149	91	58
Vermont	67	67	^b	76	76	^b	89	84	4	91	87	5
Middle Atlantic	5,082	4,945	137	5,263	4,078	1,186	5,489	3,819	1,670	5,560	3,841	1,720
New Jersey	1,006	977	29	1,067	905	162	1,129	986	144	1,146	997	149
New York	2,279	2,199	80	2,334	1,871	463	2,462	1,696	766	2,499	1,693	806
Pennsylvania	1,798	1,769	29	1,863	1,302	561	1,898	1,137	761	1,915	1,151	764
East North Central	5,223	5,153	70	5,541	4,948	593	6,001	4,645	1,356	6,092	4,721	1,370
Illinois	1,401	1,377	24	1,435	1,263	172	1,539	1,380	160	1,564	1,406	158
Indiana	685	673	12	735	703	32	814	681	133	827	684	143
Michigan	1,101	1,100	1	1,201	1,128	73	1,321	945	376	1,344	1,103	240
Ohio	1,387	1,364	22	1,478	1,206	272	1,568	1,108	460	1,586	1,002	583
Wisconsin	649	639	10	693	649	43	759	531	227	771	526	246
West North Central	2,423	2,350	74	2,518	2,252	266	2,712	2,114	598	2,753	2,101	652
Iowa	422	412	10	426	410	16	442	382	61	446	384	62
Kansas	337	333	5	347	319	28	362	320	42	366	324	42
Minnesota	544	500	44	582	496	86	659	387	272	674	361	312
Missouri	706	692	14	736	612	124	800	623	177	812	625	187
Nebraska	221	220	1	227	217	10	238	209	29	240	211	29
North Dakota	91	91	1	93	92	1	94	86	8	95	87	8
South Dakota	102	102	^b	106	106	1	117	108	9	119	109	10
South Atlantic	5,534	5,473	61	6,430	5,510	920	7,598	6,035	1,563	7,802	6,087	1,715
Delaware	80	80	^b	98	93	5	121	115	6	124	120	5
District of Columbia	71	68	2	65	59	6	64	57	7	65	58	7
Florida	2,174	2,158	15	2,507	1,815	692	2,844	2,004	840	2,911	2,015	896
Georgia	636	635	^b	752	702	50	956	805	151	990	766	224
Maryland	496	492	4	571	504	67	657	605	52	673	617	56
North Carolina	786	785	2	941	897	44	1,157	941	216	1,190	968	222
South Carolina	383	383	^b	464	463	2	595	506	88	615	519	97
Virginia	645	636	9	762	730	32	922	795	127	947	812	135
West Virginia	264	236	28	270	247	23	283	208	75	286	213	74
East South Central	1,886	1,868	18	2,061	1,930	131	2,362	1,902	461	2,410	1,933	477
Alabama	508	503	4	558	507	51	628	488	139	639	505	134
Kentucky	459	448	11	491	460	31	556	465	90	566	470	97
Mississippi	313	313	^b	330	325	5	366	330	36	372	336	36
Tennessee	607	604	3	682	638	44	813	618	195	833	623	210
West South Central	2,879	2,875	4	3,276	2,754	522	3,827	3,105	722	3,930	3,160	770
Arkansas	343	342	1	359	342	17	399	345	54	406	350	56
Louisiana	460	460	^b	497	404	93	529	396	133	539	399	140
Oklahoma	412	411	1	438	388	50	481	407	74	488	412	77
Texas	1,665	1,662	2	1,982	1,620	362	2,418	1,957	462	2,497	2,000	497
Mountain	1,489	1,452	38	1,914	1,400	514	2,447	1,660	786	2,530	1,715	815
Arizona	456	436	19	596	371	225	762	483	279	788	506	282
Colorado	324	312	11	403	253	151	515	333	182	535	345	189
Idaho	121	121	1	145	129	16	186	131	55	193	133	60
Montana	106	105	^b	119	118	^b	140	115	26	144	117	27
Nevada	128	127	1	212	139	73	293	198	95	304	206	98
New Mexico	160	158	2	200	159	41	249	182	67	256	187	69
Utah	147	145	2	183	176	7	235	156	78	242	157	85
Wyoming	47	47	^b	57	56	2	67	63	4	69	64	5

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3a—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of fee-for-service and managed care enrollees aged 65 or older, by census division and state or other area, July 1, 1990–2010, selected years (in thousands)—Continued

Census division and state or area	1990			2000			2009			2010		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Pacific	4,081	3,813	267	4,692	2,808	1,884	5,497	3,503	1,994	5,665	3,580	2,085
Alaska	22	22	b	35	35	b	51	50	1	54	53	1
California	2,989	2,750	239	3,430	1,947	1,483	3,964	2,479	1,485	4,081	2,528	1,552
Hawaii	118	114	4	151	98	53	178	103	75	184	104	80
Oregon	390	371	19	433	260	173	513	288	225	527	297	231
Washington	562	556	6	643	468	175	790	583	208	818	598	221
Unknown	10	10	b	9	8	1	4	3	b	3	3	b
Outlying areas												
Puerto Rico	337	337	b	401	400	1	492	188	303	506	175	331
U.S. Virgin Islands	6	6	b	9	9	b	14	13	b	14	14	b
Other	b	b	b	9	9	b	14	13	b	14	14	b
Foreign countries	255	254	b	288	285	3	348	345	3	355	352	3

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Characterization of persons enrolled may differ slightly from that in other tables on enrollment, and in prior editions of this table, because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

- a. Includes enrollees with unknown residence.
- b. Fewer than 500 enrollees.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3b—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of fee-for-service and managed care disabled enrollees, by census division and state or other area, July 1, 1990–2010, selected years (in thousands)

Census division and state or area	1990			2000			2009			2010		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Total												
All areas	3,260	3,238	22	5,373	4,913	460	7,755	6,435	1,321	8,033	6,619	1,414
United States ^a	3,154	3,132	22	5,219	4,759	459	7,573	6,350	1,223	7,847	6,540	1,307
New England	156	156	b	284	265	19	401	376	25	415	390	25
Connecticut	33	33	b	57	53	4	76	69	7	78	70	8
Maine	18	18	b	36	36	b	54	52	2	56	54	2
Massachusetts	72	72	b	131	120	11	179	171	8	186	179	7
New Hampshire	11	11	b	23	23	b	39	38	2	41	39	2
Rhode Island	14	14	b	24	20	4	33	27	6	34	29	5
Vermont	7	7	b	13	13	b	19	19	b	20	20	b
Middle Atlantic	474	470	4	729	655	73	1,004	792	212	1,039	819	220
New Jersey	86	85	1	133	124	9	175	159	16	181	163	18
New York	230	228	2	366	334	31	475	386	90	490	392	98
Pennsylvania	158	157	1	230	197	33	354	248	106	368	264	104
East North Central	562	560	2	823	773	50	1,167	1,034	134	1,216	1,080	136
Illinois	132	132	1	195	180	15	267	246	21	276	256	20
Indiana	77	76	1	117	114	3	171	153	19	179	158	21
Michigan	132	132	b	200	193	7	293	261	32	307	279	29
Ohio	156	155	1	221	199	23	302	259	43	315	269	46
Wisconsin	64	64	b	90	88	2	133	115	19	139	118	21
West North Central	212	210	2	339	324	14	495	443	52	513	456	57
Iowa	34	34	b	50	49	1	69	64	6	71	66	6
Kansas	26	26	b	43	42	2	64	59	5	66	61	5
Minnesota	44	44	b	72	70	1	108	94	14	112	97	15
Missouri	75	75	1	124	115	10	185	164	22	192	168	24
Nebraska	16	16	b	26	26	1	38	34	4	39	35	4
North Dakota	7	7	b	10	10	b	14	13	1	14	13	1
South Dakota	8	8	b	13	13	b	17	16	1	18	17	1
South Atlantic	608	604	4	1,082	998	84	1,555	1,291	263	1,606	1,325	281
Delaware	8	8	b	15	14	b	24	23	1	25	24	1
District of Columbia	7	7	b	10	9	b	12	12	1	13	12	1
Florida	165	165	1	316	253	63	445	333	112	463	343	120
Georgia	96	96	b	167	161	6	238	207	31	246	207	38
Maryland	46	46	b	75	70	5	108	101	7	112	104	8
North Carolina	106	106	b	195	191	4	291	250	41	300	258	42
South Carolina	59	59	b	105	105	b	154	129	25	159	131	27
Virginia	77	76	1	133	130	3	188	158	30	194	162	31
West Virginia	44	41	3	67	64	3	94	79	14	95	82	13
East South Central	287	286	1	498	482	16	728	607	121	750	616	134
Alabama	74	74	b	128	119	9	200	156	44	206	159	47
Kentucky	75	74	1	132	128	4	188	163	24	193	167	26
Mississippi	53	53	b	89	88	b	122	111	11	125	113	12
Tennessee	85	85	b	149	146	3	218	176	42	225	175	50
West South Central	317	317	b	541	492	50	857	722	134	892	743	149
Arkansas	48	48	b	80	78	2	122	103	19	126	106	20
Louisiana	71	71	b	104	92	12	142	121	21	147	124	23
Oklahoma	39	39	b	70	65	4	111	98	13	115	101	14
Texas	159	159	b	288	256	31	482	401	81	504	412	92
Mountain	148	147	1	286	240	46	440	332	108	457	342	115
Arizona	43	42	b	85	62	24	138	86	51	142	88	54
Colorado	34	34	1	65	53	11	87	68	19	90	70	20
Idaho	11	11	b	21	20	1	35	29	7	37	30	7
Montana	12	12	b	18	18	b	25	21	3	26	22	3
Nevada	13	13	b	31	24	7	50	40	10	53	42	10
New Mexico	19	19	b	34	31	3	55	47	9	57	48	9
Utah	13	13	b	24	23	b	39	31	9	41	31	10
Wyoming	4	4	b	8	8	b	11	10	1	11	11	1

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3b—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of fee-for-service and managed care disabled enrollees, by census division and state or other area, July 1, 1990–2010, selected years (in thousands)—Continued

Census division and state or area	1990			2000			2009			2010		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Pacific	389	381	7	636	529	107	926	753	172	958	769	189
Alaska	3	3	b	7	7	b	11	11	b	12	12	b
California	290	283	7	464	378	86	655	534	121	676	544	133
Hawaii	9	9	b	15	14	1	22	18	4	22	17	6
Oregon	34	33	1	58	46	11	89	63	26	94	66	27
Washington	53	53	b	93	84	9	148	127	21	154	131	23
Unknown	2	2	b	1	1	b	b	b	b	b	b	b
Outlying areas												
Puerto Rico	92	92	b	136	136	b	162	64	97	164	58	107
U.S. Virgin Islands	1	1	b	1	1	b	2	2	b	2	2	b
Other	b	b	b	2	2	b	3	3	b	3	3	b
Foreign countries	14	14	b	15	15	b	16	16	b	17	16	b

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Characterization of persons enrolled may differ slightly from that in other tables on enrollment, and in prior editions of this table, because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

- a. Includes enrollees with unknown residence.
- b. Fewer than 500 enrollees.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3c—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of fee-for-service and managed care enrollees, by census division and state or other area, July 1, 1990–2010, selected years (in thousands)

Census division and state or area	1990			2000			2009			2010		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Total												
All areas	34,200	33,493	706	39,620	32,753	6,867	46,521	35,360	11,161	47,664	35,910	11,754
United States ^a	33,494	32,789	706	38,759	31,896	6,863	45,471	34,714	10,757	46,588	35,276	11,313
New England	1,889	1,874	15	2,120	1,714	405	2,362	1,953	409	2,411	1,985	427
Connecticut	469	467	2	514	409	105	558	463	95	568	463	104
Maine	183	183	^b	217	214	2	259	231	28	265	231	33
Massachusetts	867	858	9	958	721	237	1,039	838	201	1,061	858	203
New Hampshire	137	137	^b	170	167	3	217	202	16	223	206	18
Rhode Island	159	155	3	172	114	58	180	115	65	183	120	63
Vermont	75	74	^b	89	89	^b	108	103	5	112	107	5
Middle Atlantic	5,556	5,415	141	5,992	4,733	1,259	6,493	4,610	1,882	6,599	4,659	1,939
New Jersey	1,092	1,062	30	1,200	1,029	170	1,304	1,144	160	1,327	1,160	167
New York	2,508	2,427	82	2,699	2,206	494	2,937	2,082	855	2,988	2,085	904
Pennsylvania	1,956	1,926	30	2,093	1,498	595	2,252	1,385	867	2,283	1,415	869
East North Central	5,784	5,713	72	6,364	5,722	643	7,168	5,679	1,489	7,308	5,801	1,506
Illinois	1,534	1,509	24	1,630	1,443	187	1,806	1,626	181	1,839	1,662	178
Indiana	762	749	13	852	816	35	985	834	151	1,006	842	164
Michigan	1,233	1,231	1	1,401	1,320	80	1,615	1,206	408	1,651	1,382	269
Ohio	1,543	1,520	23	1,699	1,405	295	1,870	1,367	503	1,901	1,271	629
Wisconsin	714	703	10	783	737	46	892	646	246	911	644	267
West North Central	2,635	2,560	75	2,857	2,576	281	3,207	2,557	650	3,265	2,557	709
Iowa	457	446	11	476	459	17	512	445	67	517	449	68
Kansas	363	359	5	390	360	30	425	379	47	433	385	48
Minnesota	588	544	44	654	566	88	767	481	286	786	458	328
Missouri	781	767	14	861	727	133	985	786	199	1,004	793	211
Nebraska	237	237	1	253	243	11	276	243	33	279	246	34
North Dakota	98	98	1	103	102	1	108	99	9	109	100	9
South Dakota	110	110	^b	119	119	1	134	124	10	137	125	11
South Atlantic	6,142	6,077	65	7,512	6,508	1,004	9,153	7,326	1,826	9,408	7,412	1,997
Delaware	88	88	^b	112	107	5	145	138	7	149	144	6
District of Columbia	78	75	3	75	68	7	77	69	8	78	70	8
Florida	2,339	2,323	16	2,823	2,068	754	3,289	2,337	952	3,375	2,359	1,016
Georgia	732	731	^b	918	863	56	1,194	1,012	182	1,236	973	262
Maryland	541	538	4	646	574	72	764	705	59	785	721	64
North Carolina	892	890	2	1,136	1,088	48	1,448	1,191	257	1,490	1,225	265
South Carolina	442	441	^b	570	568	2	749	635	114	774	650	124
Virginia	722	712	10	895	860	35	1,110	953	157	1,141	974	166
West Virginia	308	277	30	337	312	26	377	287	90	382	295	87
East South Central	2,173	2,153	20	2,559	2,411	147	3,090	2,509	582	3,160	2,549	611
Alabama	582	577	5	686	626	60	828	645	183	845	664	181
Kentucky	534	521	12	623	588	35	743	629	115	760	637	123
Mississippi	366	366	^b	419	413	6	488	441	47	497	450	48
Tennessee	692	689	3	831	784	47	1,031	794	237	1,058	798	260
West South Central	3,196	3,192	5	3,817	3,246	571	4,683	3,827	856	4,823	3,903	919
Arkansas	391	390	1	439	420	19	520	448	73	531	456	76
Louisiana	531	531	^b	601	496	105	671	518	154	687	524	163
Oklahoma	451	450	1	508	453	54	592	505	87	603	512	91
Texas	1,824	1,821	2	2,269	1,876	393	2,900	2,357	543	3,001	2,412	589
Mountain	1,637	1,599	39	2,200	1,640	560	2,887	1,992	895	2,987	2,057	930
Arizona	498	478	20	681	433	248	899	569	331	930	594	336
Colorado	358	346	12	468	306	162	602	401	201	625	415	209
Idaho	132	131	1	166	149	17	222	160	62	230	163	67
Montana	117	117	^b	137	136	1	165	136	29	170	139	30
Nevada	141	140	1	243	163	80	343	238	105	357	249	108
New Mexico	179	177	2	234	190	44	304	229	75	313	235	79
Utah	160	157	2	206	199	7	274	187	87	283	188	96
Wyoming	52	51	^b	65	64	2	78	73	5	80	75	5

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B3c—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of fee-for-service and managed care enrollees, by census division and state or other area, July 1, 1990–2010, selected years (in thousands)—Continued

Census division and state or area	1990			2000			2009			2010		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Pacific	4,469	4,195	275	5,328	3,337	1,991	6,423	4,256	2,167	6,623	4,349	2,274
Alaska	25	25	b	42	42	b	63	62	1	66	65	1
California	3,279	3,033	245	3,894	2,325	1,569	4,620	3,013	1,606	4,757	3,072	1,685
Hawaii	127	123	4	165	111	54	200	121	80	206	121	86
Oregon	424	404	19	491	307	184	602	351	251	621	363	258
Washington	615	609	6	736	553	183	938	710	228	972	728	244
Unknown	12	12	b	10	9	1	4	4	b	4	3	b
Outlying areas												
Puerto Rico	429	429	b	537	536	1	653	253	401	670	233	438
U.S. Virgin Islands	7	7	b	10	10	b	15	15	b	16	16	b
Other	b	b	b	11	11	b	17	16	b	17	17	b
Foreign countries	269	268	b	303	300	3	364	361	3	372	369	3

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Characterization of persons enrolled may differ slightly from that in other tables on enrollment because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

- a. Includes enrollees with unknown residence.
- b. Fewer than 500 enrollees.

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**Table 8.B4—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance):
Number of enrollees aged 65 or older, by program, age, sex, and race, July 1, 1990–2010, selected years
(in thousands)**

Age, sex, and race	1990			2000			2010		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Hospital Insurance and/or Supplementary Medical Insurance									
Total	30,939	30,255	684	34,247	27,840	6,407	39,631	29,291	10,340
Age									
65–69	9,690	9,514	176	9,166	7,360	1,806	12,096	9,046	3,050
70–74	7,951	7,752	200	8,609	6,878	1,731	9,138	6,602	2,536
75–79	6,058	5,904	155	7,284	5,902	1,381	7,169	5,146	2,023
80–84	3,957	3,864	93	4,868	4,010	859	5,617	4,145	1,472
85 or older	3,282	3,221	61	4,320	3,690	630	5,612	4,352	1,259
Sex									
Men	12,412	12,132	280	14,109	11,421	2,688	17,167	12,770	4,398
Women	18,528	18,123	404	20,138	16,419	3,719	22,464	16,521	5,943
Race									
White	26,847	26,251	596	29,752	24,251	5,502	33,581	25,020	8,561
Black	--	--	--	2,720	2,204	516	3,330	2,332	999
All other races ^a	3,113	3,050	63	1,682	1,305	377	2,624	1,857	767
American Indian or Alaska Native	--	--	--	42	39	3	143	124	18
Asian or Pacific Islander	--	--	--	494	386	108	848	632	216
Hispanic	--	--	--	710	555	155	884	584	301
Other	--	--	--	436	324	112	749	516	232
Unknown	979	953	26	92	81	12	95	82	13
Hospital Insurance									
Total	30,455	29,778	678	33,827	27,429	6,398	39,283	28,954	10,330
Age									
65–69	9,560	9,386	174	9,074	7,269	1,804	12,000	8,954	3,047
70–74	7,829	7,631	198	8,505	6,776	1,729	9,063	6,529	2,534
75–79	5,947	5,793	153	7,188	5,809	1,379	7,106	5,085	2,021
80–84	3,872	3,780	92	4,805	3,947	857	5,564	4,093	1,470
85 or older	3,248	3,188	60	4,256	3,627	629	5,551	4,293	1,258
Sex									
Men	12,276	11,998	278	13,976	11,291	2,685	17,054	12,660	4,394
Women	18,179	17,779	400	19,851	16,138	3,713	22,230	16,293	5,936
Race									
White	26,583	25,991	592	29,565	24,068	5,497	33,444	24,889	8,554
Black	--	--	--	2,668	2,153	515	3,283	2,287	997
All other races ^a	2,930	2,870	60	1,508	1,133	374	2,469	1,703	766
American Indian or Alaska Native	--	--	--	40	37	3	140	121	18
Asian or Pacific Islander	--	--	--	406	300	106	769	553	215
Hispanic	--	--	--	656	502	154	837	537	300
Other	--	--	--	405	294	111	724	492	232
Unknown	942	916	26	87	75	12	87	74	13

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B4—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of enrollees aged 65 or older, by program, age, sex, and race, July 1, 1990–2010, selected years (in thousands)—Continued

Age, sex, and race	1990			2000			2010		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Supplementary Medical Insurance									
Total	29,678	28,993	684	32,585	26,178	6,407	36,768	26,429	10,340
Age									
65–69	9,003	8,827	176	8,330	6,525	1,806	10,382	7,332	3,050
70–74	7,740	7,540	200	8,256	6,525	1,731	8,625	6,089	2,536
75–79	5,942	5,787	155	7,087	5,705	1,381	6,919	4,896	2,023
80–84	3,879	3,786	93	4,780	3,922	859	5,474	4,002	1,472
85 or older	3,114	3,054	61	4,131	3,501	630	5,368	4,109	1,259
Sex									
Men	11,754	11,474	280	13,203	10,515	2,688	15,579	11,182	4,397
Women	17,923	17,519	404	19,382	15,663	3,719	21,189	15,247	5,943
Race									
White	25,842	25,247	596	28,428	22,927	5,502	31,316	22,755	8,561
Black	--	--	--	2,543	2,027	516	3,061	2,062	998
All other races ^a	2,909	2,846	63	1,542	1,164	377	2,327	1,560	767
American Indian or Alaska Native	--	--	--	39	36	3	128	109	18
Asian or Pacific Islander	--	--	--	470	362	108	766	550	216
Hispanic	--	--	--	665	510	155	799	498	301
Other	--	--	--	368	257	112	635	402	232
Unknown	927	900	26	71	60	12	64	51	13

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Characterization of beneficiaries as to Medicare status and demographic categories may differ from that in other tables on enrollment, and in prior editions of this table, because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

-- = not available.

a. Prior to 2000, black enrollees and members of other races were combined into "All other races." In 1994, the Health Care Financing Administration expanded the race codes to include Hispanic, Asian or Pacific Islander, and American Indian or Alaska Native. There were a number of efforts during the 1990s to populate these codes and identify persons coded as "Unknown." Consequently for 2000 and later, black enrollees are broken out separately from "All other races" and the detail for that category is shown.

CONTACT: Maria Diacogiannis (410) 786-0178 or statistics@ssa.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B5—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of enrollees under age 65 who are disabled or have end-stage renal disease (ESRD), by program, age, sex, and race, July 1, 1990–2010, selected years (in thousands)

Age, sex, and race	1990			2000			2010		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
<i>Hospital Insurance and/or Supplementary Medical Insurance</i>									
Total	3,260	3,238	22	5,373	4,913	460	8,033	6,619	1,414
Age									
Under 35	483	482	1	522	505	18	711	649	62
35–44	655	652	3	1,130	1,068	62	1,154	1,008	145
45–54	741	737	4	1,627	1,501	126	2,477	2,075	402
55–64	1,381	1,367	13	2,094	1,840	254	3,691	2,887	803
Sex									
Men	2,045	2,032	14	3,017	2,772	245	4,193	3,511	682
Women	1,215	1,207	8	2,356	2,141	215	3,840	3,108	732
Race									
White	2,485	2,467	18	3,994	3,641	353	5,799	4,781	1,019
Black	--	--	--	1,008	933	74	1,560	1,301	259
All other races ^a	713	710	3	356	327	32	646	513	133
American Indian or Alaska Native	--	--	--	23	22	1	66	61	5
Asian or Pacific Islander	--	--	--	41	38	4	100	84	16
Hispanic	--	--	--	201	182	19	337	257	80
Other	--	--	--	90	83	7	143	111	31
Unknown	62	62	1	15	14	1	28	24	4
<i>Hospital Insurance</i>									
Total	3,260	3,238	22	5,372	4,913	460	8,032	6,619	1,414
Age									
Under 35	483	482	1	522	504	18	711	649	62
35–44	655	652	3	1,129	1,068	62	1,154	1,008	145
45–54	741	737	4	1,627	1,501	126	2,477	2,075	402
55–64	1,381	1,367	13	2,093	1,840	254	3,690	2,887	803
Sex									
Men	2,045	2,032	14	3,017	2,772	245	4,193	3,511	682
Women	1,215	1,206	8	2,356	2,141	215	3,840	3,108	732
Race									
White	2,485	2,467	18	3,994	3,641	353	5,799	4,780	1,019
Black	--	--	--	1,008	933	74	1,560	1,301	259
All other races ^a	713	710	3	356	325	31	646	513	133
American Indian or Alaska Native	--	--	--	23	22	1	66	61	5
Asian or Pacific Islander	--	--	--	41	38	4	100	84	16
Hispanic	--	--	--	201	182	19	337	257	80
Other	--	--	--	90	83	7	143	111	31
Unknown	62	61	1	15	14	1	28	24	4

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B5—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of enrollees under age 65 who are disabled or have end-stage renal disease (ESRD), by program, age, sex, and race, July 1, 1990–2010, selected years (in thousands)—*Continued*

Age, sex, and race	1990			2000			2010		
	Total	Fee for service	Managed care	Total	Fee for service	Managed care	Total	Fee for service	Managed care
Supplementary Medical Insurance									
Total	2,948	2,926	22	4,775	4,315	460	7,185	5,772	1,413
Age									
Under 35	442	440	1	467	449	18	647	585	62
35–44	587	584	3	998	937	62	1,028	883	145
45–54	666	662	4	1,422	1,296	126	2,211	1,808	402
55–64	1,253	1,240	13	1,887	1,633	254	3,299	2,496	803
Sex									
Men	1,836	1,822	14	2,667	2,423	245	3,701	3,019	682
Women	1,112	1,104	8	2,107	1,892	215	3,485	2,753	732
Race									
White	2,241	2,222	18	3,539	3,186	353	5,167	4,149	1,018
Black	--	--	--	918	843	74	1,423	1,165	259
All other races ^a	651	648	3	305	274	31	570	438	133
American Indian or Alaska Native	--	--	--	21	20	1	60	55	5
Asian or Pacific Islander	--	--	--	36	33	4	87	72	16
Hispanic	--	--	--	176	157	19	301	220	80
Other	--	--	--	71	64	7	122	91	31
Unknown	57	56	1	13	12	1	24	20	4

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Characterization of beneficiaries as to Medicare status and demographic categories may differ from that in other tables on enrollment, and in prior editions of this table, because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

-- = not available.

a. Prior to 2000, black enrollees and members of other races were combined into "All other races." In 1994, the Health Care Financing Administration expanded the race codes to include Hispanic, Asian or Pacific Islander, and American Indian or Alaska Native. There were a number of efforts during the 1990s to populate these codes and identify persons coded as "Unknown." Consequently for 2000 and later, black enrollees are broken out separately from "All other races" and the detail for that category is shown.

CONTACT: Maria Diacogiannis (410) 786-0178 or statistics@ssa.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B5.1—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Home health agency covered visits and program payments, by census division and state or other area, selected years 1990–2009

Census division and state or area	1990			2000			2009		
	Total visits (thousands)	Program payments (thousands of dollars)	Program payments per visit (dollars)	Total visits (thousands)	Program payments (thousands of dollars)	Program payments per visit (dollars)	Total visits (thousands)	Program payments (thousands of dollars)	Program payments per visit (dollars)
Total									
All areas	70,268	3,713,652	53	90,566	7,215,958	80	130,099	18,733,108	144
United States	69,645	3,687,770	53	87,641	6,995,748	80	128,448	18,472,543	144
New England	4,716	243,462	52	6,953	511,226	74	6,299	964,553	153
Connecticut	1,062	56,806	53	1,696	120,602	71	1,697	233,265	137
Maine	380	19,900	52	664	47,095	71	462	73,313	159
Massachusetts	2,403	121,472	51	3,328	253,132	76	3,058	492,061	161
New Hampshire	292	15,274	52	504	36,257	72	497	78,859	159
Rhode Island	315	17,537	56	393	32,720	83	301	47,953	159
Vermont	264	12,473	47	368	21,418	58	285	39,103	137
Middle Atlantic	8,570	504,379	59	12,446	1,066,579	86	11,906	1,742,706	146
New Jersey	1,435	71,239	50	2,274	203,145	89	2,299	398,178	173
New York	2,867	193,812	68	5,983	510,094	85	6,279	812,039	129
Pennsylvania	4,269	239,329	56	4,190	353,341	84	3,329	532,489	160
East North Central	8,864	488,161	55	11,615	996,673	86	16,709	2,860,396	171
Illinois	2,695	152,406	57	3,112	278,001	89	5,756	1,071,909	186
Indiana	1,112	56,613	51	1,464	112,768	77	1,939	292,746	151
Michigan	2,157	128,251	59	3,436	311,343	91	4,409	816,862	185
Ohio	2,082	108,602	52	2,713	223,430	82	3,805	552,352	145
Wisconsin	817	42,289	52	891	71,131	80	800	126,527	158
West North Central	3,591	182,775	51	3,884	297,355	77	4,055	621,441	153
Iowa	490	20,609	42	602	39,847	66	575	75,641	132
Kansas	463	22,023	49	515	38,056	74	661	94,630	143
Minnesota	380	20,168	53	525	40,350	77	681	110,762	163
Missouri	1,809	96,011	53	1,651	134,144	81	1,625	262,606	162
Nebraska	283	15,169	54	318	25,063	79	339	52,825	156
North Dakota	104	4,979	48	140	9,814	70	84	10,717	128
South Dakota	71	3,816	54	134	10,083	75	90	14,259	158
South Atlantic	15,504	792,155	51	17,603	1,434,967	82	33,310	4,266,414	128
Delaware	195	9,033	46	222	18,759	85	248	41,741	168
District of Columbia	129	8,552	66	154	13,859	90	157	27,954	178
Florida	7,513	371,331	49	7,032	576,519	82	22,654	2,454,417	108
Georgia	2,647	120,132	45	2,568	197,327	77	2,761	449,792	163
Maryland	863	52,659	61	1,046	95,980	92	1,099	211,936	193
North Carolina	1,659	93,205	56	2,533	209,226	83	2,397	416,703	174
South Carolina	694	41,712	60	1,412	118,278	84	1,292	231,727	179
Virginia	1,277	70,498	55	2,030	157,804	78	2,184	347,737	159
West Virginia	528	25,033	47	606	47,215	78	518	84,408	163
East South Central	11,432	501,015	44	10,424	708,458	68	10,098	1,528,488	151
Alabama	2,792	111,655	40	2,466	163,019	66	2,345	352,256	150
Kentucky	1,202	56,717	47	1,916	135,941	71	1,861	288,143	155
Mississippi	2,777	108,559	39	2,514	159,346	63	2,273	341,748	150
Tennessee	4,661	224,084	48	3,529	250,152	71	3,620	546,342	151
West South Central	9,063	445,067	49	15,305	1,062,985	69	31,937	4,144,012	130
Arkansas	1,072	47,907	45	1,103	70,205	64	1,332	166,067	125
Louisiana	2,286	106,074	46	4,081	261,901	64	4,096	562,064	137
Oklahoma	1,153	57,990	50	2,354	149,916	64	3,856	468,605	122
Texas	4,553	233,095	51	7,767	580,964	75	22,654	2,947,276	130
Mountain	2,485	139,038	56	3,188	257,608	81	4,526	671,049	148
Arizona	568	33,529	59	497	43,124	87	709	128,068	181
Colorado	595	35,779	60	725	59,239	82	826	131,391	159
Idaho	153	8,904	58	258	22,771	88	355	51,689	146
Montana	195	9,825	50	208	16,200	78	144	23,658	164
Nevada	218	13,279	61	309	27,152	88	744	124,243	167
New Mexico	256	13,328	52	390	30,327	78	548	78,867	144
Utah	447	21,573	48	680	50,606	74	1,107	119,667	108
Wyoming	53	2,820	53	120	8,190	68	92	13,466	146

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B5.1—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Home health agency covered visits and program payments, by census division and state or other area, selected years 1990–2009—Continued

Census division and state or area	1990			2000			2009		
	Total visits (thousands)	Program payments (thousands of dollars)	Program payments per visit (dollars)	Total visits (thousands)	Program payments (thousands of dollars)	Program payments per visit (dollars)	Total visits (thousands)	Program payments (thousands of dollars)	Program payments per visit (dollars)
Pacific	5,419	391,717	72	6,222	659,896	106	9,606	1,673,483	174
Alaska	14	1,404	100	39	5,145	132	52	10,810	208
California	4,237	310,835	73	5,031	529,250	105	8,312	1,400,206	168
Hawaii	57	4,241	74	84	8,980	107	51	11,546	226
Oregon	417	29,872	72	399	45,225	113	386	81,792	212
Washington	693	45,365	65	669	71,296	107	806	169,129	210
Outlying areas ^a	622	25,882	42	2,926	220,210	75	1,651	260,565	158

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Medicare program payments represent fee-for-service only and exclude amounts paid for managed care services. With the implementation of the home health agency prospective payment system, beginning October 1, 2000, program payments are associated with episodes and not with individual visits.

Totals do not necessarily equal the sum of rounded components.

Statistics are subject to sampling error.

a. Includes unknown residence.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8.2—Medicare Part A (Hospital Insurance): Short-stay hospital discharges, days of care per discharge, and program payments, by census division and state or other area, selected years 1990–2009

Census division and state or area	1990				2000				2009			
	Total discharges ^a	Days per discharge	Program payments (thousands of dollars)	Program payments per discharge (dollars) ^b	Total discharges ^a	Days per discharge	Program payments (thousands of dollars)	Program payments per discharge (dollars) ^b	Total discharges ^a	Days per discharge	Program payments (thousands of dollars) ^c	Program payments per discharge (dollars) ^{b,c}
Total												
All areas	10,521,925	8.8	53,708,287	5,281	11,719,960	6.0	81,230,259	6,971	11,558,205	5.5	114,516,481	9,977
United States	10,421,685	8.8	53,502,918	5,312	11,574,200	6.0	80,769,047	7,019	11,508,690	5.5	114,231,779	9,995
New England												
Connecticut	117,230	10.4	719,274	6,366	125,295	6.2	1,097,034	8,807	155,510	5.8	1,812,862	11,739
Maine	54,695	9.3	239,915	4,477	69,740	5.6	434,302	6,239	61,385	5.2	571,729	9,346
Massachusetts	281,780	10.0	1,598,356	5,878	257,720	5.7	2,035,018	7,952	299,985	5.2	3,063,041	10,278
New Hampshire	39,640	9.2	190,737	4,917	46,970	5.6	334,202	7,167	48,880	5.4	495,220	10,172
Rhode Island	47,060	10.0	251,050	5,514	37,325	6.2	276,771	7,449	36,850	5.7	357,106	9,824
Vermont	20,860	9.7	97,686	4,793	26,255	5.7	188,547	7,237	20,240	5.3	253,782	12,607
Middle Atlantic												
New Jersey	353,960	11.7	1,933,841	5,606	380,730	7.5	3,384,886	8,983	408,880	6.0	4,393,032	10,855
New York	729,465	13.1	4,888,241	6,884	750,130	8.2	7,155,309	9,625	747,980	6.8	9,391,678	12,671
Pennsylvania	696,550	9.5	3,662,512	5,358	617,100	6.1	4,324,358	7,036	516,100	5.6	4,772,923	9,304
East North Central												
Illinois	1,890,545	8.6	10,017,401	5,413	2,118,675	5.7	14,097,236	6,693	2,046,630	5.3	19,477,385	9,586
Indiana	509,075	8.9	2,670,430	5,410	580,250	5.7	3,840,706	6,672	610,485	5.3	5,770,908	9,559
Michigan	254,105	8.3	1,198,667	4,837	291,380	5.7	1,796,295	6,198	279,405	5.3	2,613,455	9,396
Ohio	376,545	8.9	2,199,988	5,925	468,095	6.1	3,473,727	7,459	461,595	5.4	4,697,495	10,238
Wisconsin	534,035	8.6	2,920,387	5,567	538,445	5.6	3,466,013	6,471	509,765	5.2	4,584,160	9,042
West North Central												
Iowa	216,785	7.7	1,027,929	4,817	240,505	5.4	1,520,493	6,352	185,380	5.0	1,811,366	9,838
Kansas	841,935	7.8	3,804,644	4,683	925,865	5.4	5,759,187	6,250	806,330	5.0	7,334,959	9,134
Minnesota	145,360	8.1	635,397	4,440	164,590	5.4	959,210	5,844	120,115	5.2	1,079,811	9,038
Missouri	124,065	7.7	542,828	4,516	134,585	5.5	806,523	6,005	114,135	5.1	993,136	8,731
Nebraska	165,095	6.7	764,017	5,052	193,910	5.0	1,256,854	6,545	166,555	4.6	1,624,719	9,789
North Dakota	266,625	8.6	1,270,319	4,872	281,505	5.7	1,810,063	6,460	282,445	5.2	2,490,959	8,861
South Dakota	69,875	7.6	300,070	4,434	76,015	5.2	506,171	6,686	66,920	5.1	630,738	9,458
South Atlantic												
Delaware	33,230	7.2	141,966	4,368	33,640	5.1	193,994	5,793	24,110	4.8	214,092	8,902
District of Columbia	27,260	9.3	149,857	5,599	36,845	6.4	275,714	7,513	43,735	5.7	480,161	11,003
Florida	24,410	11.6	183,855	7,754	26,940	7.9	269,614	10,121	25,335	6.5	328,972	13,188
Georgia	596,765	8.6	3,014,347	5,323	754,145	5.8	5,004,157	6,675	827,695	5.5	7,389,651	8,961
Maryland	269,315	7.9	1,143,257	4,373	320,335	5.8	2,061,225	6,469	319,430	5.5	2,982,220	9,379
North Carolina	183,820	9.4	1,092,833	6,056	217,605	5.8	1,773,771	8,190	275,215	5.0	3,204,075	11,757
South Carolina	267,020	9.6	1,215,983	4,703	396,985	6.0	2,467,636	6,251	384,095	5.5	3,754,730	9,829
Virginia	120,540	9.4	540,954	4,655	214,540	6.2	1,390,229	6,504	201,010	5.7	1,915,410	9,564
West Virginia	245,065	8.9	1,102,096	4,627	300,785	6.1	1,896,484	6,338	299,545	5.4	2,692,379	9,033
East South Central												
Alabama	114,000	8.2	463,751	4,217	135,610	5.8	772,492	5,724	104,260	5.7	908,044	8,756
Kentucky	827,120	8.2	3,345,751	4,156	1,013,885	5.8	5,704,817	5,652	943,535	5.4	7,811,498	8,316
Mississippi	228,580	8.1	959,825	4,308	274,470	5.5	1,492,353	5,454	245,855	5.5	1,897,260	7,767
Tennessee	201,625	8.3	831,981	4,255	244,210	5.6	1,362,272	5,614	234,785	5.3	2,046,356	8,759
West South Central												
Arkansas	145,900	7.8	501,880	3,522	191,685	6.4	1,013,536	5,310	167,915	5.8	1,431,614	8,558
Louisiana	251,015	8.3	1,052,065	4,307	303,520	5.9	1,836,655	6,078	294,980	5.3	2,436,267	8,284
Texas	1,103,155	8.1	5,139,839	4,772	1,298,505	5.9	8,215,049	6,357	1,305,085	5.4	11,743,445	9,080
Mountain												
Arizona	145,225	8.1	556,377	3,918	163,480	5.9	872,811	5,364	146,710	5.4	1,223,673	8,392
Colorado	206,510	7.9	968,667	4,791	226,020	5.9	1,408,934	6,263	190,880	5.6	1,600,718	8,459
Idaho	162,505	8.0	700,390	4,403	187,220	5.8	1,069,986	5,730	183,690	5.2	1,537,095	8,425
Montana	588,915	8.2	2,914,405	5,079	721,785	5.9	4,863,318	6,774	783,805	5.5	7,381,958	9,514
Nevada	445,395	7.0	2,152,663	5,100	488,870	5.0	3,196,062	6,569	523,190	4.9	5,182,950	9,974
New Mexico	135,340	7.0	711,071	5,601	131,325	5.0	866,364	6,642	165,260	4.9	1,701,737	10,399
Utah	93,400	7.3	460,034	5,251	92,655	5.0	625,753	6,788	106,680	4.8	1,038,278	9,789
Wyoming	34,290	6.2	146,967	4,382	47,780	4.6	290,241	6,102	32,795	4.5	312,968	9,569
Arizona	39,820	6.6	164,698	4,230	44,270	4.8	258,894	5,850	30,030	4.9	273,530	9,141
Nevada	34,890	8.1	201,288	6,349	46,945	6.0	349,025	7,473	69,015	5.7	717,948	10,482
New Mexico	52,435	6.8	208,909	4,235	53,130	5.2	327,251	6,196	57,155	4.9	543,858	9,581
Utah	37,740	6.3	181,133	4,928	50,715	4.8	336,745	6,661	43,650	4.5	410,472	9,431
Wyoming	17,480	6.7	78,563	4,561	22,050	5.0	141,785	6,442	18,605	4.5	184,157	9,936

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8.2—Medicare Part A (Hospital Insurance): Short-stay hospital discharges, days of care per discharge, and program payments, by census division and state or other area, selected years 1990–2009—Continued

Census division and state or area	1990				2000				2009			
	Total discharges ^a	Days per discharge	Program payments (thousands of dollars)	Program payments per discharge (dollars) ^b	Total discharges ^a	Days per discharge	Program payments (thousands of dollars)	Program payments per discharge (dollars) ^b	Total discharges ^a	Days per discharge	Program payments (thousands of dollars) ^c	Program payments per discharge (dollars) ^{b,c}
Pacific	1,124,100	7.2	6,554,074	6,290	1,013,345	5.8	8,654,933	8,599	1,107,790	5.4	13,914,514	12,696
Alaska	6,590	7.7	43,028	6,912	12,715	5.8	120,546	9,682	13,615	5.2	195,145	14,413
California	826,685	7.3	5,117,872	6,574	731,050	6.0	6,543,541	9,015	822,155	5.6	10,748,128	13,237
Hawaii	25,665	10.1	121,606	6,416	25,510	8.0	213,726	8,431	23,335	6.7	291,189	12,603
Oregon	104,300	6.2	474,125	5,211	92,985	4.6	624,464	6,741	73,445	4.8	777,591	10,642
Washington	160,860	6.7	797,442	5,414	151,085	4.9	1,152,655	7,672	175,240	4.8	1,902,458	10,916
Outlying areas ^d	100,240	7.8	205,369	2,091	145,760	6.8	461,482	3,187	49,515	7.2	284,702	5,817

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Medicare program payments represent fee-for-service only and exclude amounts paid for managed care services.

Totals do not necessarily equal the sum of rounded components.

Statistics are subject to sampling error.

- a. Excludes discharges for managed care enrollees that were paid by the managed care plan.
- b. Excludes discharges with covered services for which no program payments were reported.
- c. Because of retroactive effective dates for certain provisions of the Patient Protection and Affordable Care Act (Public Law 111-148) and other factors, data on program payments for 2009 are subject to revision.
- d. Includes unknown residence.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8.3—Medicare Part A (Hospital Insurance): Skilled nursing facility covered admissions and program payments, by census division and state or other area, selected years 1990–2009

Census division and state or area	1990			2000			2009		
	Covered admissions ^a	Program payments (thousands of dollars)	Program payments per admission (dollars) ^b	Covered admissions ^a	Program payments (thousands of dollars)	Program payments per admission (dollars) ^b	Covered admissions ^a	Program payments (thousands of dollars)	Program payments per admission (dollars) ^b
Total									
All areas	737,700	1,827,190	2,509	1,936,127	10,651,274	5,511	2,509,080	25,530,079	10,183
United States	736,466	1,824,011	2,509	1,932,134	10,635,515	5,514	2,507,355	25,516,747	10,185
New England	30,180	69,422	2,321	137,383	849,428	6,194	175,770	1,864,895	10,614
Connecticut	10,912	26,387	2,423	34,452	254,218	7,387	48,163	531,523	11,037
Maine	1,377	5,178	3,763	13,391	66,702	4,983	16,632	156,260	9,400
Massachusetts	11,733	26,107	2,267	64,946	389,016	6,003	80,080	855,909	10,694
New Hampshire	1,443	2,803	1,953	10,243	59,904	5,859	14,797	156,260	10,602
Rhode Island	3,685	7,472	2,037	9,452	54,095	5,757	9,657	96,378	9,985
Vermont	1,030	1,476	1,437	4,899	25,492	5,207	6,441	67,960	10,553
Middle Atlantic	97,503	254,554	2,642	290,974	1,937,835	6,677	382,462	3,938,404	10,305
New Jersey	10,725	27,797	2,599	68,638	412,488	6,014	113,219	1,203,262	10,628
New York	37,454	95,175	2,587	110,292	931,412	8,465	150,551	1,612,362	10,719
Pennsylvania	49,324	131,582	2,692	112,044	593,935	5,322	118,692	1,122,780	9,470
East North Central	142,252	323,800	2,305	374,369	2,014,281	5,382	479,112	4,828,977	10,088
Illinois	40,758	117,390	2,902	104,203	515,307	4,946	146,303	1,430,543	9,783
Indiana	22,093	61,858	2,844	59,020	330,466	5,600	69,370	753,302	10,862
Michigan	27,324	46,583	1,730	57,347	374,014	6,526	82,736	849,230	10,289
Ohio	33,115	61,462	1,894	107,475	555,817	5,173	131,100	1,266,929	9,669
Wisconsin	18,962	36,507	1,935	46,324	238,678	5,153	49,603	528,973	10,677
West North Central	95,732	209,517	2,206	190,486	756,598	3,973	220,566	1,900,921	8,637
Iowa	13,613	33,630	2,483	33,702	110,449	3,277	39,507	300,967	7,620
Kansas	12,712	24,259	1,919	27,334	99,927	3,657	32,722	294,834	9,016
Minnesota	28,729	54,696	1,926	42,888	199,933	4,662	44,436	400,895	9,029
Missouri	26,942	74,044	2,764	50,515	216,975	4,297	62,704	544,741	8,745
Nebraska	6,988	14,623	2,100	18,766	71,141	3,793	22,285	206,833	9,282
North Dakota	4,203	4,823	1,177	7,790	23,998	3,081	8,533	63,216	7,408
South Dakota	2,545	3,441	1,356	9,491	34,175	3,603	10,379	89,434	8,618
South Atlantic	97,746	221,593	2,304	351,271	1,962,427	5,597	488,909	4,946,638	10,121
Delaware	1,136	2,298	2,057	4,938	31,158	6,319	8,512	97,852	11,496
District of Columbia	1,118	3,635	3,283	3,745	23,113	6,175	4,861	52,585	10,827
Florida	46,617	114,361	2,504	139,057	813,328	5,866	182,311	1,983,477	10,882
Georgia	12,065	21,913	1,836	36,847	195,450	5,309	53,142	512,477	9,647
Maryland	8,450	19,625	2,344	38,562	194,644	5,065	57,045	546,738	9,585
North Carolina	12,138	21,391	1,776	50,008	270,927	5,422	70,165	682,925	9,739
South Carolina	4,787	9,645	2,127	24,069	130,669	5,430	32,413	330,929	10,214
Virginia	7,393	17,995	2,443	36,536	217,418	5,952	62,096	578,549	9,319
West Virginia	4,042	10,731	2,679	17,509	85,720	4,897	18,364	161,107	8,783
East South Central	41,228	74,764	1,842	131,017	665,240	5,081	174,885	1,618,713	9,258
Alabama	11,934	20,172	1,716	29,268	164,159	5,614	40,885	351,611	8,604
Kentucky	9,029	20,697	2,319	35,891	167,196	4,659	46,480	417,951	8,993
Mississippi	5,850	7,897	1,381	20,560	95,372	4,648	30,224	297,613	9,850
Tennessee	14,415	25,998	1,833	45,298	238,514	5,267	57,296	551,538	9,628
West South Central	62,302	173,258	2,809	183,161	869,345	4,757	249,272	2,363,464	9,487
Arkansas	6,254	13,455	2,167	22,862	83,236	3,644	29,576	227,321	7,692
Louisiana	12,244	42,336	3,488	27,165	120,360	4,433	35,254	318,165	9,029
Oklahoma	7,065	20,642	2,928	26,004	105,867	4,072	30,509	244,531	8,022
Texas	36,739	96,824	2,669	107,130	559,882	5,245	153,933	1,573,447	10,227
Mountain	43,063	105,189	2,467	87,157	435,051	5,004	101,250	1,026,267	10,150
Arizona	12,521	30,667	2,463	20,256	95,244	4,742	23,469	219,376	9,365
Colorado	10,220	29,480	2,928	18,993	99,687	5,256	25,902	273,813	10,596
Idaho	3,569	6,819	1,918	10,396	50,995	4,909	8,841	90,788	10,270
Montana	4,483	6,780	1,527	9,410	36,201	3,847	8,638	74,987	8,682
Nevada	2,173	7,202	3,328	6,348	37,209	5,867	10,184	125,258	12,306
New Mexico	2,494	7,687	3,250	6,130	31,929	5,213	8,757	87,247	9,986
Utah	6,081	14,452	2,378	11,672	65,662	5,627	10,950	112,783	10,311
Wyoming	1,522	2,102	1,388	3,952	18,123	4,586	4,509	42,016	9,320

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8.3—Medicare Part A (Hospital Insurance): Skilled nursing facility covered admissions and program payments, by census division and state or other area, selected years 1990–2009—Continued

Census division and state or area	1990			2000			2009		
	Covered admissions ^a	Program payments (thousands of dollars)	Program payments per admission (dollars) ^b	Covered admissions ^a	Program payments (thousands of dollars)	Program payments per admission (dollars) ^b	Covered admissions ^a	Program payments (thousands of dollars)	Program payments per admission (dollars) ^b
Pacific	126,460	391,915	3,155	186,316	1,145,310	6,174	235,129	3,028,467	12,896
Alaska	320	1,182	3,705	991	6,406	6,477	1,160	15,602	13,450
California	101,886	325,664	3,234	137,485	875,847	6,395	176,774	2,348,903	13,300
Hawaii	1,122	3,421	3,831	2,173	14,886	6,898	3,430	41,069	12,333
Oregon	8,869	26,399	3,111	13,964	67,421	4,844	14,771	158,678	10,748
Washington	14,263	35,249	2,551	31,703	180,749	5,742	38,994	464,215	11,914
Outlying areas ^c	1,234	3,179	2,593	3,993	15,760	3,948	1,725	13,332	7,733

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Medicare program payments represent fee-for-service only and exclude amounts paid for managed care services. Swing-bed hospital services are included in the total use and cost of Medicare skilled nursing facility services.

Totals do not necessarily equal the sum of rounded components.

- a. Includes skilled nursing facility admissions with at least one day of covered care under Medicare.
- b. The denominator used to calculate the average program payment per covered admission includes only those bills with Medicare reimbursement greater than zero.
- c. Includes unknown residence.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8.4—Medicare Part A (Hospital Insurance): Hospice care persons served, days of covered care, and program payments, by census division and state or other area, selected years 1993–2009

Census division and state or area	1993				2000				2009			
	Persons served	Covered days of care	Program payments (thousands of dollars)	Program payments per person served (dollars)	Persons served	Covered days of care	Program payments (thousands of dollars)	Program payments per person served (dollars)	Persons served	Covered days of care	Program payments (thousands of dollars)	Program payments per person served (dollars)
Total												
All areas	215,089	12,649,489	1,250,415	5,817	534,408	25,957,716	2,925,819	5,476	1,094,005	77,409,864	12,084,006	11,089
United States	207,660	11,808,826	1,184,752	5,709	529,745	25,646,822	2,903,200	5,482	1,083,355	76,136,741	11,960,584	11,083
New England	9,423	478,589	51,507	5,468	20,642	799,522	104,817	5,078	49,002	2,884,298	497,422	10,185
Connecticut	2,083	78,816	12,535	6,024	5,425	197,854	31,872	5,875	10,981	521,067	104,749	9,563
Maine	477	26,596	2,250	4,717	1,135	49,657	4,977	4,386	5,287	315,485	48,966	9,281
Massachusetts	4,951	272,647	27,718	5,601	9,906	381,853	47,884	4,834	21,810	1,358,544	229,154	10,549
New Hampshire	604	31,383	2,787	4,615	1,679	77,363	8,824	5,256	4,573	265,441	43,167	9,452
Rhode Island	887	49,247	4,514	5,090	1,758	61,325	7,978	4,538	4,931	341,974	58,977	12,019
Vermont	421	19,900	1,702	4,044	739	31,470	3,279	4,438	1,420	81,787	12,406	8,768
Middle Atlantic	24,505	1,233,263	126,915	5,186	63,096	2,697,689	333,959	5,293	126,112	7,872,918	1,280,086	10,189
New Jersey	5,933	309,909	29,758	5,017	13,067	560,846	67,535	5,169	28,897	1,821,104	314,930	10,937
New York	11,400	576,724	63,460	5,567	23,214	1,008,086	135,580	5,841	39,503	2,153,450	380,077	9,659
Pennsylvania	7,172	346,630	33,696	4,717	26,815	1,128,757	130,843	4,880	57,712	3,898,364	585,078	10,176
East North Central	37,377	2,061,004	207,056	5,541	93,025	4,154,816	464,650	4,996	177,215	11,273,492	1,758,015	9,960
Illinois	10,856	630,851	66,465	6,123	24,067	1,071,673	121,113	5,033	40,206	2,366,228	384,517	9,602
Indiana	1,708	101,725	9,310	5,454	9,984	484,813	51,390	5,149	22,644	1,505,176	222,008	9,852
Michigan	9,984	521,346	52,695	5,279	22,873	1,017,365	115,791	5,063	41,245	2,475,022	381,727	9,287
Ohio	10,981	596,101	59,575	5,427	27,228	1,159,156	132,377	4,863	52,022	3,494,337	548,148	10,586
Wisconsin	3,848	210,981	19,008	4,943	8,873	421,809	43,977	4,959	21,098	1,432,729	221,614	10,528
West North Central	14,164	865,934	80,074	5,659	36,720	1,748,289	176,312	4,804	79,203	5,309,398	759,906	9,626
Iowa	2,545	165,177	15,656	6,162	6,460	298,008	30,383	4,705	15,394	958,234	139,868	9,114
Kansas	2,190	144,153	13,161	6,021	5,550	267,095	26,068	4,708	11,946	868,112	122,507	10,290
Minnesota	3,303	185,954	18,338	5,555	8,175	402,271	45,222	5,532	16,270	972,863	150,598	9,288
Missouri	4,411	272,688	24,401	5,537	11,678	554,407	52,819	4,524	25,204	1,904,372	261,824	10,419
Nebraska	871	50,606	4,178	4,797	2,982	142,942	13,829	4,638	6,509	383,358	54,770	8,442
North Dakota	479	27,677	2,498	5,216	1,023	42,601	4,151	4,058	1,671	101,626	13,026	7,819
South Dakota	365	19,679	1,839	5,055	852	40,965	3,838	4,505	2,209	120,833	17,310	7,886
South Atlantic	48,947	2,962,460	289,612	5,921	112,303	5,663,896	656,729	5,851	238,011	17,633,938	2,850,726	12,025
Delaware	699	37,634	3,367	4,818	1,550	78,705	8,819	5,690	4,720	424,552	68,557	14,556
District of Columbia	283	13,467	1,381	4,899	614	29,755	3,866	6,297	1,288	89,321	15,133	11,759
Florida	28,465	1,677,775	170,767	6,001	56,248	2,819,511	350,229	6,229	99,048	7,290,770	1,286,170	13,023
Georgia	3,526	178,394	15,480	4,392	13,658	723,558	77,534	5,683	33,097	2,607,706	398,346	12,103
Maryland	2,792	136,154	13,277	4,771	7,638	298,523	34,343	4,496	15,068	839,376	135,228	9,009
North Carolina	7,111	541,896	49,572	6,972	13,198	717,297	77,961	5,913	33,919	2,454,491	376,110	11,136
South Carolina	2,181	146,669	13,105	6,009	6,552	345,769	34,999	5,345	20,216	1,733,891	256,763	12,758
Virginia	2,240	128,588	13,190	5,910	9,397	467,386	51,049	5,434	22,753	1,621,263	235,120	10,376
West Virginia	1,650	101,883	9,468	5,770	3,448	183,392	17,926	5,199	7,902	572,568	79,296	10,126
East South Central	11,117	769,046	71,474	6,432	32,995	2,126,137	208,855	6,332	75,167	6,182,444	853,267	11,410
Alabama	2,914	171,404	15,094	5,182	11,421	838,025	79,080	6,925	25,380	2,452,950	325,394	12,871
Kentucky	4,851	399,811	37,024	7,634	8,047	443,176	45,727	5,684	13,721	837,300	124,859	9,174
Mississippi	1,153	70,260	6,449	5,598	5,693	467,035	45,142	7,931	13,930	1,416,998	185,592	13,413
Tennessee	2,199	127,571	12,905	5,872	7,834	377,901	38,903	4,971	22,136	1,475,196	217,420	9,859
West South Central	21,336	1,299,331	122,741	5,754	62,010	3,558,642	364,302	5,876	126,644	10,348,674	1,488,495	11,798
Arkansas	1,975	124,494	10,723	5,430	5,281	323,207	30,097	5,700	11,075	700,541	102,256	9,262
Louisiana	1,991	97,592	8,831	4,436	7,154	350,795	36,690	5,130	17,207	1,436,928	195,268	11,418
Oklahoma	2,019	105,462	9,731	4,820	10,423	755,349	69,813	6,699	18,842	1,845,515	240,510	12,820
Texas	15,351	971,783	93,455	6,089	39,152	2,129,291	227,700	5,817	79,520	6,365,690	950,460	11,992
Mountain	12,453	624,739	66,336	5,330	38,491	1,806,545	212,559	5,523	79,709	6,301,512	997,364	12,557
Arizona	5,123	229,256	27,722	5,411	15,509	732,768	91,111	5,875	29,330	2,471,755	407,866	13,939
Colorado	3,250	160,173	16,126	4,970	8,840	344,737	41,239	4,666	15,732	1,090,733	178,475	11,381
Idaho	838	50,527	4,407	5,260	1,940	101,328	9,991	5,150	5,376	437,779	60,945	11,390
Montana	585	35,506	3,157	5,406	1,405	78,669	7,783	5,540	3,219	199,251	27,730	8,652
Nevada	958	58,400	6,536	6,823	3,637	144,309	20,034	6,301	8,019	526,856	94,978	11,910
New Mexico	1,348	74,578	6,969	5,174	3,838	236,349	24,181	5,589	7,785	670,978	99,071	12,770
Utah	263	11,506	979	3,740	2,805	143,233	15,676	4,914	9,180	843,530	119,118	13,041
Wyoming	88	4,793	437	4,971	517	25,152	2,540	4,943	1,068	60,630	9,177	8,633

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B8.4—Medicare Part A (Hospital Insurance): Hospice care persons served, days of covered care, and program payments, by census division and state or other area, selected years 1993–2009—Continued

Census division and state or area	1993				2000				2009			
	Persons served	Covered days of care	Program payments (thousands of dollars)	Program payments per person served (dollars)	Persons served	Covered days of care	Program payments (thousands of dollars)	Program payments per person served (dollars)	Persons served	Covered days of care	Program payments (thousands of dollars)	Program payments per person served (dollars)
Pacific	28,338	1,514,460	169,033	5,969	70,463	3,091,286	381,013	5,409	132,292	8,330,067	1,475,299	11,197
Alaska	16	895	87	5,476	103	4,269	513	4,988	507	24,915	4,126	8,237
California	20,316	1,080,047	119,651	5,896	50,116	2,208,522	279,037	5,571	92,403	6,005,340	1,093,849	11,883
Hawaii	619	27,282	2,906	4,695	1,406	56,188	7,626	5,428	2,735	154,816	26,291	9,709
Oregon	3,365	185,088	17,102	5,083	8,915	387,697	42,557	4,773	16,523	981,867	156,566	9,509
Washington	4,022	221,148	29,285	7,281	9,923	434,610	51,278	5,168	20,124	1,163,129	194,464	9,708
Outlying areas ^a	7,429	840,663	65,662	8,839	4,663	310,894	22,619	4,851	10,650	1,273,123	123,421	11,639

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Medicare program payments represent fee-for-service only and exclude amounts paid for managed care services.

Characterizations of persons served may differ slightly from those in other tables in this section because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

a. Includes unknown residence.

CONTACT: Maria Diacogiannis (410) 786-0178 or statistics@ssa.gov.

Table 8.B10—Medicare Part B (Supplementary Medical Insurance): Claims received by carriers and assignment rates, 1969–2010

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
2004	922,197	98.7
2005	951,551	98.9
2006	944,072	99.0
2007	951,072	99.1
2008	979,324	99.2
2009	974,680	99.2
2010	973,767	99.3

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 or statistics@ssa.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B11—Medicare Part B (Supplementary Medical Insurance): Reasonable charge determination for claims assigned and unassigned for aged and disabled persons, 1971–2010

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
2004	781,000	89.8	208,027	52.9
2005	846,093	87.2	236,430	52.0
2006	837,332	92.0	246,608	55.1
2007	822,902	93.4	253,248	58.1
2008	851,335	92.9	279,428	58.7
2009	867,878	93.0	291,065	59.3
2010	872,278	93.7	301,388	59.6
<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)

Table 8.B11—Medicare Part B (Supplementary Medical Insurance): Reasonable charge determination for claims assigned and unassigned for aged and disabled persons, 1971–2010—Continued

Year	Claims approved		Charges before reduction	
	Number (thousands)	Percentage reduced	Amount (millions of dollars)	Percentage reduced
1990	77,746	90.4	8,789	25.3
1991	77,520	91.3	7,884	23.1
1992	66,403	82.9	6,215	18.5
1993	51,080	86.5	4,267	16.5
1994	39,364	86.4	3,255	16.3
1995	29,975	83.4	2,543	15.4
1996	22,819	84.4	1,952	15.8
1997	18,615	84.4	1,650	16.4
1998	15,172	82.3	1,382	17.1
1999	13,834	81.3	1,316	17.7
2000	12,755	78.6	1,287	18.1
2001	12,085	76.7	1,252	18.2
2002	11,352	79.8	1,107	17.2
2003	11,100	82.1	1,066	15.9
2004	10,016	83.0	1,009	16.3
2005	9,589	82.2	1,000	17.4
2006	8,439	85.1	894	18.8
2007	7,378	88.4	790	18.2
2008	6,926	88.1	774	18.7
2009	6,677	88.0	746	19.1
2010	5,905	86.4	669	18.7

SOURCE: Centers for Medicare & Medicaid Services.

a. Excludes Texas Blue Shield plan from July to December 1981.

CONTACT: Maria Diacogiannis (410) 786-0178 or statistics@ssa.gov.

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B11.1—Medicare Part B (Supplementary Medical Insurance): Physician/supplier covered services, allowed charges, and program payments, by census division and state or other area, selected years 1993–2009

Census division and state or area	1993			2000			2009		
	Services (thousands)	Allowed charges (thousands of dollars)	Program payments (thousands of dollars)	Services (thousands)	Allowed charges (thousands of dollars)	Program payments (thousands of dollars)	Services (thousands)	Allowed charges (thousands of dollars)	Program payments (thousands of dollars)
Total									
All areas	1,062,047	46,155,237	35,206,101	1,247,483	66,911,902	51,456,747	1,826,304	117,586,191	91,115,719
United States	1,050,605	45,677,059	34,838,562	1,229,583	66,047,753	50,790,939	1,817,442	117,085,295	90,725,758
New England	57,475	2,532,989	1,923,891	60,701	3,357,803	2,562,793	88,803	5,833,431	4,477,742
Connecticut	14,971	688,632	523,801	16,024	908,981	696,770	24,804	1,695,340	1,311,240
Maine	5,093	203,657	152,933	6,725	357,616	272,731	8,072	516,316	393,010
Massachusetts	26,993	1,216,000	927,157	26,099	1,464,973	1,117,345	39,936	2,584,274	1,983,670
New Hampshire	3,712	151,558	113,589	5,018	264,412	200,026	7,102	486,327	371,264
Rhode Island	5,089	200,132	152,442	4,512	227,420	175,093	5,617	345,476	263,377
Vermont	1,617	73,011	53,968	2,323	134,403	100,828	3,272	205,699	155,181
Middle Atlantic	190,966	8,727,545	6,679,025	198,796	11,114,019	8,582,935	273,666	17,728,678	13,801,318
New Jersey	39,741	1,795,252	1,374,199	46,582	2,706,642	2,098,689	75,681	5,079,007	3,974,037
New York	84,011	3,869,484	2,968,599	94,073	5,222,652	4,031,686	129,267	8,148,221	6,344,913
Pennsylvania	67,214	3,062,810	2,336,227	58,141	3,184,725	2,452,560	68,717	4,501,450	3,482,367
East North Central	178,252	7,526,281	5,711,398	202,748	10,835,911	8,301,058	281,930	18,177,356	14,023,513
Illinois	43,382	1,995,230	1,518,069	50,279	2,722,188	2,087,286	82,417	5,385,193	4,159,458
Indiana	19,724	855,441	642,446	27,376	1,418,457	1,079,378	38,254	2,466,052	1,896,438
Michigan	48,483	1,916,709	1,468,007	50,326	2,823,614	2,173,760	64,557	4,324,717	3,347,410
Ohio	47,701	2,011,679	1,522,281	50,755	2,722,161	2,085,982	69,476	4,384,175	3,381,277
Wisconsin	18,962	747,222	560,596	24,012	1,149,491	874,652	27,225	1,617,219	1,238,931
West North Central	69,790	2,693,967	2,024,254	86,209	4,213,384	3,209,083	112,093	6,884,607	5,292,700
Iowa	13,006	457,750	342,045	15,717	732,727	556,426	18,368	1,093,601	835,867
Kansas	10,888	451,677	342,214	13,030	671,147	514,252	18,055	1,120,642	864,694
Minnesota	11,608	438,052	323,989	16,548	798,015	603,082	18,475	1,161,003	888,014
Missouri	22,543	914,332	693,436	25,365	1,300,857	996,024	37,119	2,315,664	1,786,987
Nebraska	6,294	233,733	174,219	8,226	388,700	294,564	11,191	684,680	526,483
North Dakota	2,595	96,467	72,033	3,349	149,240	113,542	3,637	217,186	166,194
South Dakota	2,856	101,957	76,316	3,974	172,698	131,194	5,248	291,830	224,460
South Atlantic	216,862	9,345,787	7,164,358	270,430	14,646,480	11,291,572	421,592	27,193,944	21,123,055
Delaware	3,037	137,176	104,482	4,302	244,628	188,488	7,545	497,198	385,612
District of Columbia	2,620	121,120	93,475	2,346	136,917	105,493	2,851	200,889	156,396
Florida	96,578	4,399,081	3,410,771	105,141	6,100,419	4,747,090	161,898	10,957,315	8,577,467
Georgia	25,860	1,058,968	807,700	32,915	1,725,056	1,323,041	54,055	3,379,608	2,613,163
Maryland	18,896	883,554	679,402	22,693	1,316,285	1,014,698	36,483	2,534,438	1,964,080
North Carolina	26,228	1,014,093	763,647	40,027	1,960,603	1,494,488	64,389	3,819,503	2,950,355
South Carolina	13,834	515,359	386,450	21,862	1,117,181	855,190	34,945	2,145,523	1,656,990
Virginia	22,218	890,532	672,647	30,380	1,517,689	1,159,960	46,168	2,847,870	2,194,311
West Virginia	7,592	325,904	245,784	10,764	527,703	403,124	13,259	811,600	624,681
East South Central	70,461	2,797,568	2,129,747	91,596	4,658,756	3,566,213	137,169	8,103,918	6,268,756
Alabama	19,916	810,199	618,658	24,361	1,286,579	988,420	35,248	2,128,786	1,647,378
Kentucky	16,959	662,058	503,342	22,036	1,062,201	812,037	33,029	1,919,146	1,485,658
Mississippi	11,214	449,002	340,330	14,913	776,595	595,267	22,497	1,361,251	1,051,934
Tennessee	22,372	876,309	667,417	30,286	1,533,381	1,170,489	46,396	2,694,735	2,083,786
West South Central	104,249	4,415,507	3,375,452	134,444	6,928,068	5,349,132	210,939	13,202,489	10,248,493
Arkansas	12,311	487,744	367,896	15,708	781,724	599,631	22,146	1,320,770	1,021,071
Louisiana	17,967	798,002	610,958	19,622	1,058,214	816,817	25,974	1,679,074	1,297,179
Oklahoma	13,387	538,757	408,622	15,874	845,762	649,096	24,440	1,527,990	1,178,848
Texas	60,584	2,591,004	1,987,977	83,240	4,242,368	3,283,588	138,380	8,674,654	6,751,394
Mountain	43,230	1,899,807	1,443,957	53,859	2,986,527	2,286,851	87,956	5,953,606	4,596,012
Arizona	14,630	641,234	493,319	16,122	897,890	694,194	29,963	1,996,021	1,553,908
Colorado	9,017	368,183	280,001	10,021	545,066	417,340	17,501	1,182,964	915,123
Idaho	3,187	133,188	100,116	4,382	232,051	176,337	5,765	364,114	278,061
Montana	2,737	122,992	91,713	3,944	219,874	167,290	4,720	311,851	238,435
Nevada	4,744	239,310	183,265	6,605	374,374	287,238	11,859	860,083	663,310
New Mexico	4,111	178,573	134,253	5,218	293,417	224,310	8,190	565,300	433,834
Utah	3,580	158,473	117,886	5,657	320,886	241,885	7,251	490,223	373,152
Wyoming	1,224	57,853	43,405	1,910	102,968	78,257	2,707	183,048	140,188

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B11.1—Medicare Part B (Supplementary Medical Insurance): Physician/supplier covered services, allowed charges, and program payments, by census division and state or other area, selected years 1993–2009—Continued

Census division and state or area	1993			2000			2009		
	Services (thousands)	Allowed charges (thousands of dollars)	Program payments (thousands of dollars)	Services (thousands)	Allowed charges (thousands of dollars)	Program payments (thousands of dollars)	Services (thousands)	Allowed charges (thousands of dollars)	Program payments (thousands of dollars)
Pacific	119,320	5,737,609	4,386,479	130,801	7,306,805	5,641,301	203,293	14,007,267	10,894,171
Alaska	599	30,305	22,675	964	60,128	45,822	1,861	166,045	127,686
California	91,760	4,561,912	3,504,741	99,393	5,621,663	4,358,871	155,268	10,819,581	8,447,277
Hawaii	2,517	112,138	83,062	3,642	180,404	134,791	4,679	269,381	203,817
Oregon	8,461	362,350	271,415	9,002	487,346	371,215	12,218	833,328	638,661
Washington	15,982	670,904	504,586	17,800	957,265	730,602	29,268	1,918,931	1,476,731
Outlying areas ^a	11,442	478,177	367,538	17,900	864,149	665,808	8,862	500,896	389,961

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Allowed charges and program payments represent fee-for-service utilization only and exclude amounts paid for managed care services.

Totals do not necessarily equal the sum of rounded components.

Statistics are subject to sampling error.

a. Includes unknown residence.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B11.2—Medicare Part B (Supplementary Medical Insurance): Outpatient facilities persons served and program payments, by census division and state or other area, selected years 1991–2009

Census division and state or area	1991		2000		2009	
	Persons served (thousands)	Program payments (millions of dollars)	Persons served (thousands)	Program payments (millions of dollars)	Persons served (thousands)	Program payments (millions of dollars) ^a
Total						
All areas	17,176	9,433	21,537	16,732	24,002	43,984
United States	17,040	9,386	21,355	16,620	23,932	43,834
New England	1,060	587	1,237	937	1,504	2,845
Connecticut	233	142	274	225	321	583
Maine	124	45	168	117	195	367
Massachusetts	493	297	525	410	657	1,234
New Hampshire	80	37	120	79	160	336
Rhode Island	79	46	77	55	79	136
Vermont	51	21	74	52	92	188
Middle Atlantic	2,850	1,500	3,055	2,511	2,971	5,137
New Jersey	480	323	590	519	655	1,274
New York	1,163	602	1,348	1,249	1,273	2,215
Pennsylvania	1,207	575	1,118	743	1,043	1,649
East North Central	3,308	1,685	4,142	3,034	4,407	7,845
Illinois	834	407	1,015	725	1,229	2,157
Indiana	431	223	587	400	651	1,151
Michigan	754	393	1,003	807	982	1,744
Ohio	876	501	1,037	755	1,061	1,893
Wisconsin	413	161	500	348	483	900
West North Central	1,447	668	1,888	1,317	2,021	3,812
Iowa	280	120	366	254	362	669
Kansas	206	94	261	187	270	518
Minnesota	283	129	420	254	431	768
Missouri	442	214	520	384	602	1,149
Nebraska	125	62	174	130	188	375
North Dakota	52	24	69	48	81	153
South Dakota	60	24	77	60	87	180
South Atlantic	3,094	1,750	4,244	3,383	4,880	9,271
Delaware	47	19	68	57	94	160
District of Columbia	40	50	38	54	41	107
Florida	1,012	543	1,285	932	1,446	2,786
Georgia	401	243	571	465	707	1,300
Maryland	270	227	324	459	396	1,137
North Carolina	484	255	720	543	815	1,525
South Carolina	248	118	404	282	470	764
Virginia	407	226	590	426	671	1,088
West Virginia	185	69	245	164	239	403
East South Central	1,151	538	1,635	1,102	1,817	3,002
Alabama	308	155	424	261	470	735
Kentucky	284	126	399	228	473	773
Mississippi	192	92	292	254	326	637
Tennessee	366	165	520	360	549	858
West South Central	1,522	963	2,107	1,848	2,515	4,874
Arkansas	195	86	267	180	304	487
Louisiana	273	229	339	360	375	782
Oklahoma	218	105	294	210	354	558
Texas	836	542	1,206	1,098	1,482	3,047
Mountain	792	387	1,047	768	1,266	2,183
Arizona	201	180	233	169	297	514
Colorado	187	93	217	178	285	483
Idaho	75	29	108	74	118	224
Montana	66	4	101	64	109	201
Nevada	55	28	75	62	115	206
New Mexico	90	48	125	97	157	249
Utah	91	3	146	91	130	219
Wyoming	27	2	43	33	55	87

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B11.2—Medicare Part B (Supplementary Medical Insurance): Outpatient facilities persons served and program payments, by census division and state or other area, selected years 1991–2009—Continued

Census division and state or area	1991		2000		2009	
	Persons served (thousands)	Program payments (millions of dollars)	Persons served (thousands)	Program payments (millions of dollars)	Persons served (thousands)	Program payments (millions of dollars) ^a
Pacific	1,816	1,308	2,000	1,720	2,550	4,865
Alaska	14	10	26	29	40	96
California	1,295	1,011	1,346	1,200	1,740	3,386
Hawaii	37	30	58	44	65	124
Oregon	195	91	225	143	239	401
Washington	275	166	345	303	466	858
Outlying areas ^b	136	47	182	112	70	150

SOURCE: Centers for Medicare & Medicaid Services.

NOTES: Includes utilization and expenditures for all outpatient facility types. Medicare program payments represent fee-for-service only and exclude amounts paid for managed care services.

Characterizations of persons served may differ slightly from those in other tables in this section because of differences in sources and methodology.

Totals do not necessarily equal the sum of rounded components.

Statistics are subject to sampling error.

- a. Because of retroactive effective dates for certain provisions of the Patient Protection and Affordable Care Act (Public Law 111-148), data on program payments for 2009 are subject to revision.
- b. Includes unknown residence.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B12—Medicare Part B (Supplementary Medical Insurance): State buy-ins, by state or other area, selected years 1991–2011

State or area	1991	1995	2000	2005	2006	2007	2008	2009	2010	2011
All areas	3,640,121	4,705,625	5,425,048	6,577,577	6,885,326	7,082,006	7,292,444	7,434,151	7,703,292	8,141,455
Alabama	97,601	116,916	136,860	169,460	175,134	179,542	183,860	181,216	179,668	188,259
Alaska	4,539	6,193	8,486	10,748	11,465	11,904	12,218	12,393	12,908	13,618
Arizona	28,650	44,236	57,712	110,977	116,065	121,455	126,518	131,581	140,079	148,603
Arkansas	64,996	77,660	79,606	89,372	96,906	99,214	101,893	104,825	106,343	111,043
California	646,108	747,814	818,846	1,012,804	1,047,842	1,078,076	1,120,069	1,077,652	1,103,853	1,144,369
Colorado	36,470	46,660	55,325	61,294	64,505	68,264	72,451	75,845	79,980	83,898
Connecticut	23,535	48,047	53,141	66,191	66,968	67,876	70,682	73,426	94,154	116,167
Delaware	4,499	6,645	10,737	17,104	19,534	19,821	20,628	21,317	22,060	23,312
District of Columbia	12,791	14,152	14,233	15,246	15,365	15,584	16,023	17,680	20,102	22,549
Florida	196,992	271,430	342,109	431,764	459,146	470,337	490,437	519,540	553,625	619,376
Georgia	128,976	160,380	176,596	205,476	212,257	217,562	221,444	226,220	233,528	252,360
Hawaii	11,529	16,695	20,326	23,703	26,040	25,862	26,601	27,436	28,864	29,998
Idaho	9,127	12,931	17,081	23,482	24,628	26,030	26,744	28,039	28,945	30,912
Illinois	94,434	137,571	155,743	206,014	215,631	222,728	233,211	242,050	255,529	272,257
Indiana	60,297	76,460	87,543	109,669	114,933	120,079	120,825	124,312	133,816	141,834
Iowa	41,170	48,517	51,976	60,458	63,221	66,022	68,782	70,624	72,562	74,694
Kansas	26,960	34,708	41,217	47,707	49,483	50,732	51,829	53,624	56,096	59,446
Kentucky	76,456	97,978	117,697	126,468	134,469	137,602	140,970	143,692	148,188	154,983
Louisiana	87,570	112,090	117,179	139,802	140,291	141,009	148,875	153,719	158,370	166,683
Maine	22,176	29,453	36,946	46,510	52,560	64,164	78,157	83,374	84,602	85,237
Maryland	48,028	58,865	65,372	79,234	83,078	85,824	89,624	93,682	98,268	104,892
Massachusetts	89,163	125,859	152,587	178,691	188,576	191,171	195,461	196,817	199,370	207,332
Michigan	91,340	123,948	145,172	170,044	180,235	185,626	190,827	196,551	205,521	217,064
Minnesota	39,366	52,192	63,607	79,428	81,353	83,420	85,356	88,149	91,630	95,704
Mississippi	90,530	108,577	107,495	135,023	137,715	136,096	137,874	132,099	136,915	142,257
Missouri	55,116	72,659	88,343	109,561	110,734	113,722	117,954	122,450	126,577	124,669
Montana	10,058	11,031	12,828	14,455	15,097	15,456	15,811	16,170	17,587	18,420
Nebraska	11,358	16,146	20,520	24,210	25,243	25,640	27,030	27,638	34,020	33,301
Nevada	8,657	14,227	19,155	27,408	28,639	30,319	32,197	32,764	35,035	38,904
New Hampshire	3,807	5,405	7,434	11,584	12,597	13,454	14,669	15,872	17,381	18,906
New Jersey	95,795	122,923	146,705	159,110	169,804	170,280	170,807	175,716	179,273	183,880
New Mexico	22,246	29,855	37,330	49,333	52,078	53,757	56,797	59,163	62,640	65,544
New York	255,952	325,882	369,479	465,068	487,736	500,099	489,668	508,461	531,060	559,720
North Carolina	117,656	186,328	223,402	251,739	258,981	261,690	266,009	272,691	278,325	287,885
North Dakota	4,639	5,560	5,908	6,757	7,185	7,610	7,892	8,058	8,464	8,687
Ohio	112,598	164,044	171,139	204,905	223,726	234,958	247,445	258,318	273,167	288,652
Oklahoma	51,457	60,080	67,413	75,903	80,536	82,671	82,920	83,382	86,586	90,595
Oregon	28,537	43,642	59,169	70,927	72,394	75,113	78,272	81,990	87,068	87,789
Pennsylvania	127,519	162,788	206,468	242,552	258,675	268,833	274,566	284,189	295,984	321,665
Rhode Island	10,585	15,517	19,787	26,311	27,002	27,508	27,860	28,064	28,782	29,906
South Carolina	78,701	95,970	112,232	118,843	121,469	124,502	126,074	126,591	129,489	134,833
South Dakota	9,399	12,346	13,146	14,534	15,176	15,407	15,613	15,824	16,148	16,569
Tennessee	116,861	148,391	182,342	218,894	228,849	232,611	236,854	241,225	215,868	228,105
Texas	234,169	314,991	360,191	440,938	457,346	473,962	489,552	501,502	514,153	547,345
Utah	10,263	13,506	16,231	21,787	24,114	24,775	25,459	26,794	27,064	30,087
Vermont	8,223	12,428	13,754	15,509	20,857	21,831	22,078	22,212	22,798	23,342
Virginia	77,898	102,964	113,259	131,083	137,991	141,569	145,896	149,316	155,647	161,997
Washington	54,774	71,531	97,390	113,233	119,180	123,471	127,450	132,958	143,398	152,270
West Virginia	28,086	39,720	46,305	54,200	57,688	59,576	61,749	63,037	65,324	67,811
Wisconsin	67,516	75,247	74,101	83,383	85,661	87,901	90,928	93,984	96,201	102,942
Wyoming	3,505	5,265	6,444	7,749	8,015	8,135	8,458	8,736	9,087	9,586
Outlying areas										
Guam	443	669	417	409	647	633	537	645	693	719
Northern Mariana Islands	273	314	342	358	354	373	381	385	394	384
U.S. Virgin Islands	727	219	204	165	152	150	159	153	103	95

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Data are as of July except for 1995 data, which are as of June.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B13—Medicare Part D: Number of enrollees by type of plan, and Retiree Drug Subsidy (RDS) coverage, by census division, state, or other area, July 1, 2009

Census division and state or area	Total Part D and RDS enrollees	Medicare Part D			RDS ^a
		Total	Stand-alone prescription drug plan (PDP)	Medicare Advantage plan offering Part D coverage	
Total					
All areas	33,545,614	27,020,712	17,500,588	9,520,124	6,524,902
United States	33,066,278	26,568,880	17,446,970	9,121,910	6,497,398
New England	1,726,785	1,337,959	969,796	368,163	388,826
Connecticut	418,406	304,324	216,990	87,334	114,082
Maine	178,834	157,766	135,440	22,326	21,068
Massachusetts	781,659	594,782	408,600	186,182	186,877
New Hampshire	138,217	101,581	91,670	9,911	36,636
Rhode Island	132,149	120,067	59,939	60,128	12,082
Vermont	77,520	59,439	57,157	2,282	18,081
Middle Atlantic	4,892,752	3,780,587	2,212,160	1,568,427	1,112,165
New Jersey	963,219	675,824	545,831	129,993	287,395
New York	2,245,543	1,701,991	969,211	732,780	543,552
Pennsylvania	1,683,990	1,402,772	697,118	705,654	281,218
East North Central	5,352,862	3,841,997	2,776,882	1,065,115	1,510,865
Illinois	1,327,569	989,926	855,353	134,573	337,643
Indiana	721,398	538,626	442,828	95,798	182,772
Michigan	1,247,422	854,150	532,916	321,234	393,272
Ohio	1,453,237	988,555	636,574	351,981	464,682
Wisconsin	603,236	470,740	309,211	161,529	132,496
West North Central	2,360,310	2,057,930	1,518,783	539,147	302,380
Iowa	388,849	337,635	288,002	49,633	51,214
Kansas	289,170	258,438	219,925	38,513	30,732
Minnesota	590,213	517,480	285,855	231,625	72,733
Missouri	719,033	606,133	426,549	179,584	112,900
Nebraska	199,634	176,022	150,855	25,167	23,612
North Dakota	79,302	74,865	69,069	5,796	4,437
South Dakota	94,109	87,357	78,528	8,829	6,752
South Atlantic	6,390,080	5,128,797	3,534,347	1,594,450	1,261,283
Delaware	106,687	72,082	67,149	4,933	34,605
District of Columbia	39,676	35,585	28,086	7,499	4,091
Florida	2,379,193	1,945,152	1,035,073	910,079	434,041
Georgia	824,246	699,686	554,591	145,095	124,560
Maryland	476,381	329,832	278,046	51,786	146,549
North Carolina	1,075,347	848,868	637,120	211,748	226,479
South Carolina	521,854	399,955	314,068	85,887	121,899
Virginia	687,092	570,075	457,074	113,001	117,017
West Virginia	279,604	227,562	163,140	64,422	52,042
East South Central	2,237,401	1,859,133	1,374,581	484,552	378,268
Alabama	595,530	480,615	309,767	170,848	114,915
Kentucky	540,335	414,431	342,501	71,930	125,904
Mississippi	341,104	311,948	279,247	32,701	29,156
Tennessee	760,432	652,139	443,066	209,073	108,293
West South Central	3,301,836	2,694,077	1,946,735	747,342	607,759
Arkansas	359,799	310,994	255,649	55,345	48,805
Louisiana	498,190	411,091	273,625	137,466	87,099
Oklahoma	393,609	348,582	276,085	72,497	45,027
Texas	2,050,238	1,623,410	1,141,376	482,034	426,828
Mountain	2,002,009	1,681,198	877,386	803,812	320,811
Arizona	645,064	545,930	228,667	317,263	99,134
Colorado	426,623	349,390	169,952	179,438	77,233
Idaho	149,451	125,996	81,592	44,404	23,455
Montana	108,497	93,251	73,380	19,871	15,246
Nevada	232,469	188,581	87,475	101,106	43,888
New Mexico	209,432	185,761	116,599	69,162	23,671
Utah	181,219	150,278	81,266	69,012	30,941
Wyoming	49,254	42,011	38,455	3,556	7,243

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B13—Medicare Part D: Number of enrollees by type of plan, and Retiree Drug Subsidy (RDS) coverage, by census division, state, or other area, July 1, 2009—Continued

Census division and state or area	Total Part D and RDS enrollees	Medicare Part D			RDS ^a
		Total	Stand-alone prescription drug plan (PDP)	Medicare Advantage plan offering Part D coverage	
Pacific	4,802,243	4,187,202	2,236,300	1,950,902	615,041
Alaska	39,949	24,279	23,612	667	15,670
California	3,587,538	3,162,038	1,634,161	1,527,877	425,500
Hawaii	137,995	130,743	61,277	69,466	7,252
Oregon	428,483	382,990	183,289	199,701	45,493
Washington	608,278	487,152	333,961	153,191	121,126
Outlying areas ^b	479,336	451,832	53,618	398,214	27,504

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: Characterization of enrollees may differ from that in other tables on Part D enrollment because of differences in sources and methodology.

- a. RDS provides a Medicare subsidy to employers and unions who continue assisting their Medicare-eligible retirees with prescription drug coverage.
- b. Includes unknown residence.

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8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B14—Medicare Part D: Number of enrollees by Part D status, census division, state, or other area, July 1, 2009

Census division and state or area	Total Medicare enrollees	Medicare Part D				Retiree drug subsidy (RDS) ^a	Other creditable coverage ^b (no Part D plan or RDS)	No Part D plan, RDS, or other creditable coverage
		Total	Full low-income subsidy ^c	Partial low-income subsidy ^d	No low-income subsidy			
Total								
All areas	46,520,716	27,021,322	9,577,310	407,359	17,036,653	6,524,902	6,048,456	6,926,036
United States	45,466,997	26,569,490	9,562,106	406,986	16,600,398	6,497,398	5,981,870	6,418,239
New England	2,362,057	1,337,995	545,781	15,973	776,241	388,826	292,510	342,726
Connecticut	558,107	304,340	103,567	2,543	198,230	114,082	62,966	76,719
Maine	259,090	157,768	88,390	557	68,821	21,068	36,889	43,365
Massachusetts	1,039,299	594,791	251,836	8,104	334,851	186,877	116,622	141,009
New Hampshire	217,378	101,589	34,343	1,934	65,312	36,636	35,130	44,023
Rhode Island	180,233	120,068	40,707	2,066	77,295	12,082	25,703	22,380
Vermont	107,950	59,439	26,938	769	31,732	18,081	15,200	15,230
Middle Atlantic	6,493,367	3,780,719	1,366,203	55,836	2,358,680	1,112,165	694,177	906,306
New Jersey	1,304,311	675,841	218,378	10,829	446,634	287,395	146,324	194,751
New York	2,937,045	1,702,029	742,755	21,149	938,125	543,552	279,275	412,189
Pennsylvania	2,252,011	1,402,849	405,070	23,858	973,921	281,218	268,578	299,366
East North Central	7,168,120	3,842,094	1,263,076	60,312	2,518,706	1,510,865	739,618	1,075,543
Illinois	1,806,475	989,974	344,912	17,187	627,875	337,643	194,193	284,665
Indiana	985,107	538,631	172,734	10,484	355,413	182,772	119,400	144,304
Michigan	1,614,512	854,166	273,354	13,874	566,938	393,272	132,716	234,358
Ohio	1,870,284	988,573	327,668	15,266	645,639	464,682	188,793	228,236
Wisconsin	891,742	470,750	144,408	3,501	322,841	132,496	104,516	183,980
West North Central	3,207,275	2,057,945	556,135	27,988	1,473,822	302,380	449,200	397,750
Iowa	511,615	337,636	81,575	4,205	251,856	51,214	67,855	54,910
Kansas	425,444	258,440	67,926	4,074	186,440	30,732	69,193	67,079
Minnesota	766,806	517,484	128,993	5,319	383,172	72,733	90,912	85,677
Missouri	985,325	606,137	196,511	9,473	400,153	112,900	135,521	130,767
Nebraska	275,617	176,026	43,089	2,428	130,509	23,612	44,062	31,917
North Dakota	107,998	74,865	16,840	1,198	56,827	4,437	16,667	12,029
South Dakota	134,470	87,357	21,201	1,291	64,865	6,752	24,990	15,371
South Atlantic	9,152,655	5,128,888	1,865,301	92,694	3,170,893	1,261,283	1,467,346	1,295,138
Delaware	145,065	72,083	24,625	1,242	46,216	34,605	19,181	19,196
District of Columbia	76,694	35,585	22,140	334	13,111	4,091	20,684	16,334
Florida	3,289,117	1,945,163	620,109	24,607	1,300,447	434,041	473,622	436,291
Georgia	1,193,887	699,692	288,653	13,578	397,461	124,560	188,435	181,200
Maryland	764,123	329,849	122,799	6,215	200,835	146,549	154,756	132,969
North Carolina	1,447,965	848,900	336,649	19,872	492,379	226,479	191,966	180,620
South Carolina	748,651	399,971	167,660	10,093	222,218	121,899	124,615	102,166
Virginia	1,109,909	570,079	197,413	11,714	360,952	117,017	243,141	179,672
West Virginia	377,244	227,566	85,253	5,039	137,274	52,042	50,946	46,690
East South Central	3,090,194	1,859,162	849,336	40,027	969,799	378,268	446,552	406,212
Alabama	827,594	480,618	218,664	10,839	251,115	114,915	132,454	99,607
Kentucky	743,418	414,435	189,355	10,558	214,522	125,904	96,339	106,740
Mississippi	487,978	311,959	159,539	6,173	146,247	29,156	78,570	68,293
Tennessee	1,031,204	652,150	281,778	12,457	357,915	108,293	139,189	131,572
West South Central	4,683,251	2,694,126	1,130,009	55,211	1,508,906	607,759	698,303	683,063
Arkansas	520,377	311,005	130,915	7,218	172,872	48,805	87,958	72,609
Louisiana	671,294	411,095	188,681	8,394	214,020	87,099	79,811	93,289
Oklahoma	591,793	348,587	121,031	6,602	220,954	45,027	101,406	96,773
Texas	2,899,787	1,623,439	689,382	32,997	901,060	426,828	429,128	420,392
Mountain	2,887,012	1,681,217	475,726	23,158	1,182,333	320,811	464,672	420,312
Arizona	899,487	545,939	159,274	6,044	380,621	99,134	133,095	121,319
Colorado	601,992	349,391	94,018	4,751	250,622	77,233	93,945	81,423
Idaho	221,962	125,997	35,190	2,149	88,658	23,455	36,704	35,806
Montana	164,635	93,252	24,828	2,000	66,424	15,246	28,107	28,030
Nevada	343,026	188,586	48,384	2,822	137,380	43,888	58,870	51,682
New Mexico	303,827	185,763	68,124	2,762	114,877	23,671	49,031	45,362
Utah	273,860	150,278	35,241	1,975	113,062	30,941	49,984	42,657
Wyoming	78,223	42,011	10,667	655	30,689	7,243	14,936	14,033

(Continued)

8.B Medicare: Enrollment, Utilization, and Reimbursement

Table 8.B14—Medicare Part D: Number of enrollees by Part D status, census division, state, or other area, July 1, 2009—Continued

Census division and state or area	Total Medicare enrollees	Medicare Part D				Retiree drug subsidy (RDS) ^a	Other creditable coverage ^b (no Part D plan or RDS)	No Part D plan, RDS, or other creditable coverage
		Total	Full low-income subsidy ^c	Partial low-income subsidy ^d	No low-income subsidy			
Pacific	6,423,066	4,187,344	1,510,539	35,787	2,641,018	615,041	729,492	891,189
Alaska	62,707	24,279	14,435	259	9,585	15,670	10,993	11,765
California	4,619,642	3,162,167	1,206,745	22,942	1,932,480	425,500	453,747	578,228
Hawaii	200,305	130,745	35,920	1,468	93,357	7,252	33,008	29,300
Oregon	602,246	382,993	96,401	5,121	281,471	45,493	82,516	91,244
Washington	938,166	487,160	157,038	5,997	324,125	121,126	149,228	180,652
Outlying areas ^e	1,053,719	451,832	15,204	373	436,255	27,504	66,586	507,797

SOURCE: Centers for Medicare & Medicaid Services.

- a. RDS provides a Medicare subsidy to employers and unions who continue assisting their Medicare-eligible retirees with prescription drug coverage.
- b. Creditable coverage is alternative prescription drug coverage in which the actuarial value of the coverage equals or exceeds the actuarial value of standard Medicare prescription drug coverage.
- c. Individuals are automatically eligible for the full low-income subsidy (LIS) if they are dually eligible for Medicare and Medicaid benefits, enrolled in a Medicare savings program, or receiving Supplemental Security Income.
- d. Individuals not automatically eligible for full LIS must apply for LIS coverage. Applicants may be found eligible for full or partial LIS, depending on their income and resources.
- e. Includes unknown residence.

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Table 8.C1—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of facilities and beds, by type of participating provider, December 1967–2010, selected years

Year	Hospitals			Skilled nursing facilities	Home health agencies	Clinical Laboratory Improvement Act/ independent laboratories ^a
	All hospitals	General ^b	Psychiatric			
<i>Facilities</i>						
1967	6,829	6,501	328	4,405	1,890	2,355
1970	6,779	6,444	335	4,494	2,333	2,750
1975	6,770	6,383	387	3,932	2,290	3,174
1976	6,774	6,368	406	3,992	2,353	3,156
1977	6,755	6,353	402	4,461	2,496	3,249
1978	6,848	6,432	416	4,982	2,715	3,384
1979	6,780	6,372	408	5,055	2,858	3,448
1980	6,736	6,325	411	5,155	3,012	3,374
1981	6,749	6,335	414	5,295	3,169	3,511
1982	6,737	6,321	416	5,510	3,627	3,643
1983	6,687	6,257	430	5,760	4,235	3,708
1984	6,676	6,228	448	6,183	5,237	3,890
1985	6,710	6,209	501	6,725	5,932	4,029
1986	6,731	6,189	542	7,148	5,953	4,298
1987	6,715	6,130	585	7,379	5,769	4,487
1988	6,658	6,044	614	7,683	5,673	4,676
1989	6,547	5,891	656	8,688	5,661	4,828
1990	6,522	5,848	674	9,008	5,730	4,881
1991	6,471	5,759	712	10,061	5,963	4,898
1992	6,433	5,722	711	10,910	6,461	4,942
1993	6,473	5,738	735	11,472	7,000	156,117
1994	6,414	5,705	709	12,584	7,827	151,422
1995	6,376	5,694	682	13,452	8,447	156,511
1996	6,273	5,627	646	14,177	9,850	157,876
1997	6,293	5,639	654	14,860	10,807	164,054
1998	6,116	5,514	602	15,032	9,330	166,817
1999	5,985	5,415	570	14,913	7,857	171,018
2000	6,031	5,512	519	14,841	7,099	168,333
2001	6,002	5,508	494	14,755	6,813	173,807
2002	6,024	5,537	487	14,838	6,928	176,947
2003	6,057	5,579	478	14,939	7,138	184,466
2004	6,117	5,647	470	14,986	7,519	189,340
2005	6,180	5,707	473	15,006	8,090	196,296
2006	6,177	5,695	482	15,028	8,618	199,817
2007	6,163	5,673	490	15,054	9,024	206,065
2008	6,171	5,680	491	15,032	9,407	210,872
2009	6,172	5,666	506	15,071	10,184	218,139
2010	6,169	5,658	511	15,084	10,914	224,679
<i>Beds</i>						
1967	1,141,155	837,211	303,944	308,843	...	...
1970	1,190,309	878,509	311,800	325,415	...	...
1975	1,136,908	939,717	197,191	287,468	...	...
1976	1,169,433	980,805	188,628	332,515	...	...
1977	1,130,519	976,465	154,054	381,715	...	...
1978	1,154,250	1,015,645	138,605	414,188	...	...
1979	1,152,088	1,016,525	135,563	433,715	...	...
1980	1,145,245	1,017,794	127,451	448,007	...	...
1981	1,152,877	1,032,042	120,835	463,715	...	...
1982	1,146,480	1,044,427	102,053	497,056	...	...
1983	1,143,544	1,046,674	96,870	519,551	...	...
1984	1,146,093	1,050,832	95,261	548,201	...	...
1985	1,144,589	1,046,889	97,700	--	...	...
1986	1,137,853	1,043,430	94,423	444,326	...	...
1987	1,124,928	1,030,556	94,372	449,867	...	...
1988	1,115,809	1,022,116	93,693	476,447	...	...
1989	1,106,295	1,008,845	97,450	507,475	...	...
1990	1,104,703	1,005,480	99,223	512,107	...	...

(Continued)

8.C Medicare: Participating Facilities

Table 8.C1—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of facilities and beds, by type of participating provider, December 1967–2010, selected years—Continued

Year	Hospitals			Skilled nursing facilities	Home health agencies	Clinical Laboratory Improvement Act/independent laboratories ^a
	All hospitals	General ^b	Psychiatric			
1991	1,102,286	1,003,147	99,139	583,116	...	...
1992	1,093,895	997,695	96,200	606,218	...	...
1993	1,094,422	994,847	99,575	622,534	...	...
1994	1,074,371	985,809	88,562	649,054	...	...
1995	1,056,454	970,143	86,311	657,225	...	...
1996	1,038,105	955,604	82,501	671,839	...	...
1997	1,037,356	954,372	82,984	684,977	...	...
1998	1,012,168	934,635	77,533	722,626	...	...
1999	993,901	920,326	73,575	836,720	...	...
2000	982,616	913,806	68,810	939,364	...	...
2001	968,761	901,688	67,073	1,104,978	...	...
2002	957,898	897,076	60,822	1,260,625	...	...
2003	951,628	894,457	57,171	1,371,815	...	...
2004	949,694	894,022	55,672	1,437,254	...	...
2005	947,305	892,253	55,052	1,478,277	...	...
2006	938,762	884,450	54,312	1,507,368	...	...
2007	933,998	796,931	54,251	1,532,267	...	...
2008	930,452	876,376	54,076	1,546,721	...	...
2009	926,388	870,812	55,576	1,561,299	...	...
2010	927,535	871,554	55,981	1,572,511	...	...

SOURCE: Centers for Medicare & Medicaid Services.

NOTE: ... = not applicable; -- = not available.

- a. Beginning in 1993, the data include all Clinical Laboratory Improvement Act facilities as of December of each year.
- b. Includes short-stay and other long-stay hospitals.

CONTACT: Maria Diacogiannis (410) 786-0178 or statistics@ssa.gov.

Table 8.C2—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of participating hospitals and certified beds, by type of hospital, census division, and state or other area, December 2010

Census division and state or area	All hospitals		Short-stay and critical access hospitals ^a			Other non-short-stay ^b	
	Hospitals	Beds	Hospitals	Beds	Beds per 1,000 enrollees ^c	Hospitals	Beds
Total							
All areas	6,169	927,535	4,891	814,973	17.2	1,278	112,562
United States	6,107	916,199	4,835	804,216	17.4	1,272	111,983
New England	252	43,097	186	32,970	13.7	66	10,127
Connecticut	43	10,361	32	8,435	14.9	11	1,926
Maine	41	3,979	36	3,493	13.2	5	486
Massachusetts	108	19,783	67	13,464	12.7	41	6,319
New Hampshire	30	3,529	26	3,036	13.6	4	493
Rhode Island	15	3,657	11	2,903	16.1	4	754
Vermont	15	1,788	14	1,639	14.8	1	149
Middle Atlantic	559	125,987	423	107,301	16.4	136	18,686
New Jersey	100	26,649	66	22,447	17.1	34	4,202
New York	223	63,783	189	56,339	19.0	34	7,444
Pennsylvania	236	35,555	168	28,515	12.5	68	7,040
East North Central	917	149,646	741	135,567	18.7	176	14,079
Illinois	207	40,294	180	37,112	20.5	27	3,182
Indiana	168	19,347	124	17,299	17.2	44	2,048
Michigan	171	27,921	136	25,191	15.3	35	2,730
Ohio	226	44,461	177	40,150	21.3	49	4,311
Wisconsin	145	17,623	124	15,815	17.4	21	1,808
West North Central	777	74,184	694	67,915	20.8	83	6,269
Iowa	122	10,450	116	10,089	19.5	6	361
Kansas	153	11,207	139	10,188	23.6	14	1,019
Minnesota	144	15,520	131	14,367	18.3	13	1,153
Missouri	150	23,878	116	21,577	21.5	34	2,301
Nebraska	96	6,662	88	5,873	21.1	8	789
North Dakota	49	3,107	44	2,732	25.1	5	375
South Dakota	63	3,360	60	3,089	22.6	3	271
South Atlantic	900	174,228	695	153,898	16.4	205	20,330
Delaware	12	2,693	6	2,166	14.6	6	527
District of Columbia	14	4,153	7	3,287	43.2	7	866
Florida	243	59,060	182	53,796	16.0	61	5,264
Georgia	177	24,672	142	21,732	17.8	35	2,940
Maryland	63	14,884	46	12,407	15.9	17	2,477
North Carolina	133	26,566	112	22,553	15.2	21	4,013
South Carolina	80	13,709	60	11,953	15.5	20	1,756
Virginia	116	19,592	89	17,930	15.8	27	1,662
West Virginia	62	8,899	51	8,074	21.2	11	825
East South Central	503	74,209	411	67,054	21.3	92	7,155
Alabama	127	19,324	100	17,313	20.6	27	2,011
Kentucky	117	17,463	95	15,227	20.3	22	2,236
Mississippi	111	13,039	96	12,029	24.2	15	1,010
Tennessee	148	24,383	120	22,485	21.3	28	1,898
West South Central	1,068	116,173	743	96,947	20.2	325	19,226
Arkansas	101	11,614	75	9,669	18.2	26	1,945
Louisiana	226	20,658	126	15,969	23.3	100	4,689
Oklahoma	154	14,650	127	13,211	21.9	27	1,439
Texas	587	69,251	415	58,098	19.4	172	11,153
Mountain	500	53,488	404	46,448	15.7	96	7,040
Arizona	103	15,968	78	13,891	15.1	25	2,077
Colorado	98	12,581	76	10,759	17.5	22	1,822
Idaho	51	3,497	42	3,048	13.3	9	449
Montana	64	3,131	61	2,938	17.4	3	193
Nevada	51	6,523	35	5,423	15.3	16	1,100
New Mexico	52	4,781	42	4,339	14.0	10	442
Utah	51	5,458	43	4,640	16.5	8	818
Wyoming	30	1,549	27	1,410	17.6	3	139

(Continued)

8.C Medicare: Participating Facilities

Table 8.C2—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of participating hospitals and certified beds, by type of hospital, census division, and state or other area, December 2010—Continued

Census division and state or area	All hospitals		Short-stay and critical access hospitals ^a			Other non-short-stay ^b	
	Hospitals	Beds	Hospitals	Beds	Beds per 1,000 enrollees ^c	Hospitals	Beds
Pacific	631	105,187	538	96,116	14.8	93	9,071
Alaska	25	1,556	22	1,291	19.7	3	265
California	419	79,374	348	72,868	15.8	71	6,506
Hawaii	27	2,763	23	2,359	11.5	4	404
Oregon	62	8,075	58	7,879	12.8	4	196
Washington	98	13,419	87	11,719	12.1	11	1,700
Outlying areas	62	11,336	56	10,757	15.3	6	579
Puerto Rico	57	10,651	51	10,072	15.0	6	579
U.S. Virgin Islands	2	320	2	320	20.1	0	0
Other	3	365	3	365	21.5	0	0

SOURCE: Centers for Medicare & Medicaid Services.

- a. Critical access hospitals are included with short-stay hospitals because, though not subject to one of the Medicare inpatient hospital prospective payment systems, they essentially function as and are viewed as short-stay hospitals by their communities.
- b. Other non-short-stay hospitals include long-term hospitals, psychiatric hospitals, rehabilitation hospitals, children's hospitals, and religious nonmedical institutions.
- c. Based on total number of persons enrolled in the Hospital Insurance program as of July 1, 2010.

CONTACT: Maria Diacogiannis (410) 786-0178 or statistics@ssa.gov.

Table 8.C3—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of participating skilled nursing facilities, home health agencies, Clinical Laboratory Improvement Act facilities, and end-stage renal disease facilities, by census division and state or other area, December 2010

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	15,084	1,572,511	33.2	10,914	224,679	5,631
United States	15,075	1,572,160	34.0	10,862	223,346	5,582
New England	968	101,506	42.3	326	9,925	173
Connecticut	239	28,793	51.0	84	2,684	40
Maine	109	6,434	24.4	30	1,050	17
Massachusetts	420	47,087	44.5	143	3,931	80
New Hampshire	74	7,301	32.7	34	975	12
Rhode Island	86	8,708	48.3	23	773	16
Vermont	40	3,183	28.7	12	512	8
Middle Atlantic	1,696	253,394	38.7	628	24,929	623
New Jersey	361	50,286	38.4	51	5,807	128
New York	633	117,761	39.7	195	10,974	242
Pennsylvania	702	85,347	37.4	382	8,148	253
East North Central	2,950	289,237	39.8	2,184	35,948	908
Illinois	710	70,166	38.7	681	9,486	225
Indiana	488	46,156	45.9	204	5,298	132
Michigan	413	45,500	27.6	591	7,488	175
Ohio	962	92,768	49.2	581	10,121	262
Wisconsin	377	34,647	38.1	127	3,555	114
West North Central	1,932	154,816	47.5	818	17,349	408
Iowa	415	29,072	56.3	177	2,944	62
Kansas	271	19,511	45.2	130	2,504	46
Minnesota	375	31,122	39.6	204	3,362	95
Missouri	491	47,129	47.0	176	5,228	132
Nebraska	199	14,317	51.4	71	1,890	34
North Dakota	85	6,438	59.1	21	587	17
South Dakota	96	7,227	53.0	39	834	22
South Atlantic	2,313	253,327	27.0	1,976	47,842	1,238
Delaware	40	4,436	29.8	20	810	21
District of Columbia	18	2,663	35.0	27	489	19
Florida	676	79,731	23.7	1,273	17,664	333
Georgia	356	38,083	31.2	104	7,474	281
Maryland	227	28,241	36.1	54	3,622	120
North Carolina	422	42,876	28.8	171	7,175	178
South Carolina	185	18,316	23.8	70	3,634	113
Virginia	270	29,340	25.9	201	5,133	139
West Virginia	119	9,641	25.3	56	1,841	34
East South Central	982	97,283	31.0	449	15,256	455
Alabama	225	26,273	31.3	149	3,803	124
Kentucky	285	25,531	34.0	102	3,708	97
Mississippi	172	15,922	32.1	55	2,420	73
Tennessee	300	29,557	28.0	143	5,325	161
West South Central	1,907	205,796	42.8	2,744	30,524	773
Arkansas	210	21,497	40.5	171	2,136	65
Louisiana	281	34,965	51.1	220	3,933	155
Oklahoma	290	26,345	43.7	241	3,304	73
Texas	1,126	122,989	41.1	2,112	21,151	480
Mountain	743	69,581	23.5	642	14,160	336
Arizona	139	15,411	16.7	120	4,573	113
Colorado	199	18,679	30.4	150	3,087	68
Idaho	79	6,148	26.8	46	1,013	23
Montana	86	6,773	40.1	33	723	12
Nevada	47	5,267	14.8	104	1,502	36
New Mexico	67	6,638	21.5	74	1,342	37
Utah	92	7,901	28.2	88	1,505	38
Wyoming	34	2,764	34.5	27	415	9

(Continued)

8.C Medicare: Participating Facilities

Table 8.C3—Medicare Part A (Hospital Insurance) and/or Part B (Supplementary Medical Insurance): Number of participating skilled nursing facilities, home health agencies, Clinical Laboratory Improvement Act facilities, and end-stage renal disease facilities, by census division and state or other area, December 2010—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	1,584	147,220	22.7	1,095	27,413	668
Alaska	15	561	8.6	14	577	7
California	1,179	111,850	24.2	952	20,030	517
Hawaii	45	3,998	19.4	14	785	22
Oregon	121	10,618	17.2	56	2,491	52
Washington	224	20,193	20.8	59	3,530	70
Outlying areas	9	351	0.5	52	1,333	49
Puerto Rico	7	281	0.4	44	1,177	39
U.S. Virgin Islands	1	40	2.5	2	44	3
Other	1	30	1.8	6	112	7

SOURCE: Centers for Medicare & Medicaid Services.

a. Based on total number of beneficiaries enrolled in the Hospital Insurance program as of July 1, 2010.

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Table 8.E1—Number of recipients, total vendor payments, and average payment, by type of medical service, fiscal years 1985–2009

Year	Total ^a	Inpatient services in—		Intermediate care facility services for—		Nursing facility ^b	Physicians ¹	Dental	Other practitioner	Out-patient hospital	Clinic	Laboratory and radio-logical	Home health	Pre-scribed drugs	Family plan-ning	Other ^c
		General hospital	Mental hospital	Intellectually disabled	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	^b 1,500	19,321	5,209	4,282	4,282	14,137	3,511	10,505	813	19,602	2,185	10,319
1992	30,926	5,768	77	151	^b 1,573	21,627	5,700	4,711	4,711	15,120	4,115	11,804	925	22,030	2,550	12,427
1993	33,432	5,894	75	149	^b 1,610	23,746	6,174	5,229	5,229	16,436	4,839	12,970	1,067	23,901	2,538	15,035
1994	35,053	5,866	85	159	^b 1,639	24,267	6,352	5,409	5,409	16,567	5,258	13,412	1,293	24,471	2,566	17,321
1995	36,282	5,561	84	151	^b 1,667	23,789	6,383	5,528	5,528	16,712	5,322	13,064	1,639	23,723	2,501	19,277
1996	36,118	5,362	93	140	^b 1,594	22,861	6,208	5,343	5,343	15,905	5,070	12,607	1,727	22,585	2,366	21,104
1997	34,873	4,746	87	136	^b 1,603	21,170	5,935	5,142	5,142	13,632	4,713	11,074	1,861	20,954	2,091	20,284
1998	40,649	4,273	135	126	^b 1,646	18,555	4,965	4,342	4,342	12,158	5,285	9,381	1,225	19,338	2,011	34,820
1999	40,300	4,479	96	121	^b 1,624	18,052	5,577	3,945	3,945	12,323	6,660	10,103	808	19,428	...	37,484
2000	42,886	4,912	99	118	^b 1,705	18,965	5,922	4,758	4,758	13,169	7,677	11,438	1,007	20,324	...	40,732
2001	46,163	4,879	91	116	^b 1,702	20,021	7,018	5,102	5,102	13,731	8,463	12,339	1,013	21,910	...	44,608
2002	49,329	5,046	100	117	^b 1,760	22,065	7,881	5,566	5,566	14,831	9,491	14,062	1,064	24,380	...	49,556
2003	51,971	5,217	105	114	^b 1,691	22,857	8,510	5,746	5,746	15,511	10,162	14,687	1,184	26,075	...	53,128
2004	55,002	5,425	117	114	^b 1,709	23,612	9,037	5,933	5,933	15,888	11,102	15,875	1,146	27,549	...	69,340
2005 ^d	57,643	5,488	120	109	^b 1,712	24,204	9,328	5,904	5,904	16,314	11,913	16,020	1,195	28,385	...	74,296
2006 ^e	57,732	6,268	138	107	^b 1,722	23,265	9,514	5,881	5,881	16,015	11,858	16,202	1,191	27,310	...	76,864
2007 ^f	56,825	5,126	112	104	^b 1,644	22,054	9,530	5,425	5,425	14,970	11,732	15,808	1,190	23,944	...	62,604
2008 ^g	58,705	5,256	108	102	^b 1,616	21,656	9,807	5,160	5,160	14,773	11,843	15,600	1,143	24,583	...	65,412
2009 ^h	62,458	5,433	115	101	^b 1,644	22,755	10,971	5,409	5,409	16,476	12,738	16,203	1,087	26,786	...	68,256
Total vendor 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	^b 20,709	4,952	710	437	437	4,283	2,211	897	4,101	5,424	359	3,384
1992	90,814	23,503	2,196	8,550	^b 23,544	6,102	851	538	538	5,279	2,818	1,035	4,886	6,765	500	4,243
1993	101,709	25,734	2,161	8,831	^b 25,431	6,952	961	937	937	6,215	3,457	1,137	5,601	7,970	538	5,784
1994	108,270	26,180	2,057	8,347	^b 27,095	7,189	969	1,040	1,040	6,342	3,747	1,176	7,042	8,875	516	7,695
1995	120,141	26,331	2,511	10,383	^b 29,052	7,360	1,019	986	986	6,627	4,280	1,180	9,406	9,791	514	10,700
1996	121,685	25,176	2,040	9,555	^b 29,630	7,238	1,028	1,094	1,094	6,504	4,222	1,208	10,868	10,697	474	11,948
1997	124,429	23,143	2,009	9,798	^b 30,504	7,041	1,036	979	979	6,169	4,252	1,033	12,237	11,972	418	12,958
1998	142,318	21,499	2,801	9,482	^b 31,892	6,070	901	587	587	5,759	3,921	939	2,702	13,522	449	38,747
1999	147,372	21,341	1,638	8,756	^b 31,976	6,420	1,155	464	464	5,895	5,439	1,143	2,714	15,933	...	44,492
2000	168,442	24,130	1,769	9,375	^b 34,527	6,809	1,413	663	663	7,081	6,137	1,292	3,133	19,898	...	52,209
2001	186,913	25,943	1,959	9,700	^b 37,322	7,438	1,896	761	761	7,496	5,602	1,622	3,520	23,764	...	59,884
2002	213,497	29,123	2,128	10,676	^b 39,286	8,349	2,309	842	842	8,469	6,704	2,160	3,926	28,404	...	71,121
2003	233,206	31,549	2,143	10,861	^b 40,381	9,210	2,595	882	882	9,252	7,312	2,365	4,404	33,714	...	78,537
2004	257,748	34,914	2,326	11,193	^b 42,008	10,061	2,867	951	951	10,261	8,336	2,695	4,566	39,476	...	88,096
2005 ^d	275,569	35,347	2,333	11,730	^b 44,675	11,278	3,045	1,182	1,182	10,228	8,986	2,927	5,361	42,830	...	95,649
2006 ^e	268,505	36,466	2,392	11,854	^b 45,674	10,581	3,123	1,148	1,148	10,454	8,736	2,988	5,917	28,243	...	100,930
2007 ^f	276,539	36,894	2,406	11,759	^b 46,629	10,066	3,240	921	921	10,421	8,730	2,927	6,323	22,312	...	113,394
2008 ^g	296,560	37,219	2,373	12,556	^b 47,693	10,502	3,810	883	883	10,883	9,114	2,926	6,602	23,540	...	127,180
2009 ^h	320,752	38,146	2,451	12,682	^b 48,414	11,334	4,594	928	928	11,746	10,027	3,186	7,008	25,185	...	144,063

(Continued)

8.E Medicaid: Recipients

Table 8.E1—Number of recipients, total vendor payments, and average payment, by type of medical service, fiscal years 1985–2009—Continued

Year	Total ^a	Inpatient services in—		Intermediate care facility services for—		Nursing facility ^b	Physicians'	Dental	Other practitioner	Out-patient hospital	Clinic	Laboratory and radiological	Home health	Pre-scribed drugs	Family planning	Other ^c
		General hospital	Mental hospital	Intellectually disabled	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	^b	13,811	256	136	102	303	630	85	5,048	277	164	328
1992	2,936	4,075	28,364	56,502	^b	14,965	282	149	114	349	685	88	5,283	307	196	342
1993	3,042	4,366	28,948	59,156	^b	15,798	293	156	179	378	714	88	5,250	333	212	385
1994	3,089	4,463	24,120	52,571	^b	16,533	296	153	192	383	713	88	5,445	363	201	444
1995	3,311	4,735	29,847	68,613	^b	17,424	309	160	178	397	804	90	5,740	413	206	555
1996	3,369	4,696	21,873	68,232	^b	18,589	317	166	205	409	833	96	6,293	474	200	566
1997	3,568	4,877	22,990	72,033	^b	19,029	333	275	190	453	902	93	6,575	571	200	639
1998	3,501	5,031	20,701	74,960	^b	19,379	327	182	135	474	742	100	2,206	699	223	1,113
1999	3,657	4,764	16,913	72,180	^b	19,688	356	207	118	478	817	113	3,356	820	...	1,187
2000	3,928	4,912	17,780	78,882	^b	20,240	359	239	139	538	799	113	3,111	979	...	1,282
2001	4,049	5,317	21,482	83,191	^b	21,926	372	270	149	546	662	132	3,473	1,085	...	1,342
2002	4,328	5,771	21,377	91,588	^b	22,326	378	293	151	571	706	154	3,689	1,165	...	1,435
2003	4,487	6,047	20,503	95,287	^b	23,882	403	305	154	596	720	161	3,720	1,293	...	1,478
2004	4,686	6,435	19,928	98,281	^b	24,585	426	317	160	646	751	170	3,984	1,433	...	1,270
2005 ^d	4,781	6,441	19,397	107,205	^b	26,097	466	326	200	627	754	183	4,487	1,509	...	1,287
2006 ^e	4,651	5,818	17,327	110,385	^b	26,519	455	328	195	653	737	184	4,970	1,034	...	1,313
2007 ^f	4,867	7,197	21,433	113,545	^b	28,368	456	340	170	696	744	185	5,313	932	...	1,811
2008 ^g	5,052	7,082	21,964	123,032	^b	29,515	485	388	171	737	770	188	5,773	958	...	1,944
2009 ^h	5,136	7,021	21,365	125,521	^b	29,448	498	419	172	713	787	197	6,445	940	...	2,111

SOURCE: Data through fiscal year 1998 are from HCFA Form 2082, and data from fiscal year 1999 onward are from Medicaid Statistical Information System (MSIS) State Summary Data, Centers for Medicare & Medicaid Services.

NOTES: Beginning with fiscal year 1999, excludes recipients in Puerto Rico and the U.S. Virgin Islands. Data are not available.

Totals do not necessarily equal the sum of rounded components.

... = not applicable.

- a. Total represents the unduplicated number of recipients receiving any type of medical service during the year.
- b. 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 fiscal year 1991 reflect "Skilled nursing facility services."
- c. Beginning with fiscal year 1998, several new medical services were combined with "Other" (excludes unknowns).
- d. Fiscal year 2005 data are not available for Maine. Fiscal year 2004 data have been substituted.
- e. Fiscal year 2006 data are not available for Maine and Nevada. Fiscal year 2004 data have been substituted for Maine, and fiscal year 2005 data have been substituted for Nevada.
- f. Fiscal year 2007 data are not available for Hawaii and Maine. Fiscal year 2006 data have been substituted for Hawaii, and fiscal year 2005 data have been substituted for Maine.
- g. Fiscal year 2008 data are not available for Hawaii and Utah. Fiscal year 2007 data have been substituted.
- h. Fiscal year 2009 data are not available for Hawaii, Massachusetts, Missouri, Pennsylvania, Utah, and Wisconsin. Fiscal year 2007 data have been substituted for Hawaii and Utah, and fiscal year 2008 data have been substituted for Massachusetts, Missouri, Pennsylvania, and Wisconsin.

CONTACT: Loan Swisher (410) 786-4650 or statistics@ssa.gov.

Table 8.E2—Number of recipients, total vendor payments, and average payment, by type of eligibility category, fiscal years 1985–2009

Year	Total ^a	Aged 65 or older	Blind	Permanent and total disability	Dependent children under age 21	Adults in families with dependent children	Other
<i>Number of recipients (thousands)</i>							
1985	21,814	3,061	80	2,937	9,757	5,518	1,214
1986	22,515	3,140	82	3,100	10,029	5,647	1,362
1987	23,109	3,224	85	3,296	10,168	5,599	1,418
1988	22,907	3,159	86	3,401	10,037	5,503	1,343
1989	23,511	3,132	95	3,496	10,318	5,717	1,175
1990	25,255	3,202	83	3,635	11,220	6,010	1,105
1991	28,280	3,359	85	3,983	13,415	6,778	658
1992	30,926	3,742	84	4,378	15,104	6,954	664
1993	33,432	3,863	84	4,932	16,285	7,505	763
1994	35,053	4,035	87	5,372	17,194	7,586	779
1995	36,282	4,119	92	5,767	17,164	7,604	1,537
1996	36,118	4,285	95	6,126	16,739	7,127	1,746
1997	34,872	3,955	...	6,129	15,791	6,803	2,195
1998	40,649	3,964	...	6,638	18,964	7,908	3,176
1999	40,300	4,241	...	7,303	20,119	8,552	846
2000	42,886	4,289	...	7,479	21,086	10,543	862
2001	46,163	4,420	...	7,703	22,533	11,639	869
2002	49,329	3,890	...	7,411	22,421	11,253	4,354
2003	51,971	4,041	...	7,669	23,992	11,679	4,591
2004	55,002	4,318	...	7,933	25,613	12,225	4,913
2005 ^b	57,643	4,396	...	8,210	26,337	12,529	6,171
2006 ^c	57,732	4,375	...	8,332	26,771	12,598	5,656
2007 ^d	56,825	4,043	...	8,424	26,584	12,371	5,402
2008 ^e	58,705	4,144	...	8,689	28,043	12,891	4,939
2009 ^f	62,458	4,188	...	8,998	28,634	13,907	6,731
<i>Total vendor payments (millions of dollars)</i>							
1985	37,508	14,096	249	13,203	4,414	4,746	798
1986	41,005	15,097	277	14,635	5,135	4,880	980
1987	45,050	16,037	309	16,507	5,508	5,592	1,078
1988	48,710	17,135	344	18,250	5,848	5,883	1,198
1989	54,500	18,558	409	20,476	6,892	6,897	1,268
1990	64,859	21,508	434	23,969	9,100	8,590	1,257
1991	77,048	25,453	475	27,798	11,690	10,439	1,193
1992	90,814	29,078	530	33,326	14,491	12,185	1,204
1993	101,709	31,554	589	38,065	16,504	13,605	1,391
1994	108,270	33,618	644	41,654	17,302	13,585	1,467
1995	120,141	36,527	848	48,570	17,976	13,511	2,708
1996	121,685	36,947	869	51,196	17,544	12,275	2,853
1997	124,430	37,721	...	54,130	17,544	12,307	2,727
1998	142,318	40,602	...	60,375	22,806	14,833	3,702
1999	147,372	40,470	...	63,028	20,765	15,141	7,966
2000	168,442	44,560	...	72,772	23,490	17,671	9,948
2001	186,913	48,431	...	80,493	26,770	20,096	11,121
2002	213,497	52,012	...	92,414	31,595	23,525	13,950
2003	233,206	55,271	...	102,014	35,079	26,689	14,153
2004	257,748	59,541	...	111,614	39,194	30,522	16,877
2005 ^b	275,569	63,358	...	119,647	42,012	32,385	18,167
2006 ^c	268,505	58,109	...	116,209	44,645	32,871	16,670
2007 ^d	276,539	57,362	...	119,621	47,763	33,764	18,029
2008 ^e	296,560	61,116	...	128,945	57,073	37,133	12,294
2009 ^f	320,752	63,531	...	139,051	57,382	43,266	17,523

(Continued)

8.E Medicaid: Recipients

Table 8.E2—Number of recipients, total vendor payments, and average payment, by type of eligibility category, fiscal years 1985–2009—Continued

Year	Total ^a	Aged 65 or older	Blind	Permanent and total disability	Dependent children under age 21	Adults in families with dependent children	Other
<i>Average payment (dollars)</i>							
1985	1,719	4,605	3,104	4,496	452	860	658
1986	1,821	4,808	3,401	4,721	512	864	719
1987	1,949	4,975	3,644	5,008	542	999	761
1988	2,126	5,425	4,005	5,366	583	1,069	891
1989	2,318	5,926	4,317	5,858	668	1,206	1,079
1990	2,568	6,717	5,212	6,595	811	1,429	1,138
1991	2,725	7,577	5,572	6,979	871	1,540	1,813
1992	2,936	7,770	6,298	7,612	959	1,752	1,813
1993	3,042	8,168	7,036	7,717	1,013	1,813	1,824
1994	3,089	8,331	7,412	7,755	1,006	1,791	1,884
1995	3,311	8,868	9,256	8,422	1,047	1,777	1,762
1996	3,369	8,622	9,143	8,357	1,048	1,722	1,635
1997	3,568	9,538	...	8,832	1,111	1,809	3,597
1998	3,501	10,242	...	9,095	1,203	1,876	1,166
1999	3,657	9,541	...	8,630	1,032	1,770	9,407
2000	3,928	10,388	...	9,729	1,114	1,676	11,536
2001	4,049	10,957	...	10,449	1,188	1,727	12,792
2002	4,328	13,370	...	12,470	1,409	2,091	3,204
2003	4,487	13,677	...	13,303	1,462	2,285	3,083
2004	4,686	13,790	...	14,070	1,530	2,497	3,435
2005 ^b	4,781	14,413	...	14,574	1,595	2,585	2,944
2006 ^c	4,651	13,283	...	13,947	1,668	2,609	2,947
2007 ^d	4,867	14,187	...	14,200	1,797	2,729	3,337
2008 ^e	5,052	14,748	...	14,840	2,035	2,881	2,489
2009 ^f	5,136	15,169	...	15,454	2,004	3,111	2,603

SOURCE: Data through fiscal year 1998 are from HCFA Form 2082, and data from fiscal year 1999 onward are from Medicaid Statistical Information System (MSIS) State Summary Data, Centers for Medicare & Medicaid Services.

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

Beginning with fiscal year 1997, "Disability" includes blindness. "Children" includes foster care children, and "Other" are "Unknowns." In fiscal years 1999 and 2000, "Other" includes foster care children and "Unknowns." In fiscal years 2001 and 2002, "Other" includes foster care children, "Unknowns," and individuals covered under the Breast and Cervical Cancer Prevention and Treatment Act of 2000.

Beginning with fiscal year 1999, excludes recipients in Puerto Rico and the U.S. Virgin Islands. Data are not available.

... = not applicable.

- a. Total represents the unduplicated number of recipients receiving any type of medical service during the year.
- b. Fiscal year 2005 data are not available for Maine. Fiscal year 2004 data have been substituted.
- c. Fiscal year 2006 data are not available for Maine and Nevada. Fiscal year 2004 data have been substituted for Maine, and fiscal year 2005 data have been substituted for Nevada.
- d. Fiscal year 2007 data are not available for Hawaii and Maine. Fiscal year 2006 data have been substituted for Hawaii, and fiscal year 2005 data have been substituted for Maine.
- e. Fiscal year 2008 data are not available for Hawaii and Utah. Fiscal year 2007 data have been substituted.
- f. Fiscal year 2009 data are not available for Hawaii, Massachusetts, Missouri, Pennsylvania, Utah, and Wisconsin. Fiscal year 2007 data have been substituted for Hawaii and Utah, and fiscal year 2008 data have been substituted for Massachusetts, Missouri, Pennsylvania, and Wisconsin.

CONTACT: Loan Swisher (410) 786-4650 or statistics@ssa.gov.

Table 8.H1—Number of recipients, total payments, and average payment, by state, fiscal year 2009

State	Number of recipients	Total payments (millions of dollars)	Average payment (dollars)
United States ^a	62,457,552	320,752	5,136
Alabama	876,741	3,626	4,135
Alaska	118,694	1,067	8,990
Arizona	1,588,257	8,617	5,426
Arkansas	825,121	3,579	4,338
California	11,518,565	35,224	3,058
Colorado	677,712	3,288	4,852
Connecticut	558,201	5,289	9,475
Delaware	208,904	1,264	6,052
District of Columbia	175,167	1,940	11,077
Florida	3,261,031	14,054	4,310
Georgia	1,804,917	7,376	4,087
Hawaii ^b	223,687	993	4,439
Idaho	252,785	1,351	5,345
Illinois	2,626,372	11,774	4,483
Indiana	1,109,310	5,390	4,858
Iowa	481,599	2,877	5,974
Kansas	354,752	2,316	6,528
Kentucky	941,990	5,017	5,326
Louisiana	1,184,335	5,430	4,585
Maine	314,809	1,481	4,704
Maryland	845,519	6,325	7,480
Massachusetts ^c	1,230,063	8,991	7,310
Michigan	1,890,198	10,171	5,381
Minnesota	801,908	7,029	8,766
Mississippi	931,654	3,198	3,432
Missouri ^c	1,054,099	5,225	4,957
Montana	112,584	714	6,344
Nebraska	255,629	1,590	6,218
Nevada	280,864	1,196	4,259
New Hampshire	141,380	995	7,037
New Jersey	1,150,571	8,293	7,208
New Mexico	561,758	2,913	5,185
New York	4,984,578	44,883	9,004
North Carolina	1,782,185	9,665	5,423
North Dakota	76,866	588	7,643
Ohio	2,238,140	13,972	6,243
Oklahoma	808,808	3,574	4,419
Oregon	564,307	2,797	4,957
Pennsylvania ^c	2,134,331	12,501	5,857
Rhode Island	203,223	1,556	7,654
South Carolina	906,277	4,712	5,199
South Dakota	141,131	732	5,188
Tennessee	1,479,028	7,262	4,910
Texas	4,282,564	18,543	4,330
Utah ^b	242,650	1,395	5,748
Vermont	170,619	970	5,684
Virginia	916,577	5,548	6,053
Washington	1,176,868	5,734	4,872
West Virginia	386,427	2,589	6,699
Wisconsin ^c	1,531,520	4,589	2,996
Wyoming	72,277	552	7,635

SOURCE: Medicaid Statistical Information System (MSIS) State Summary Data, Centers for Medicare & Medicaid Services.

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

- a. Excludes recipients in Puerto Rico and the U.S. Virgin Islands. Data are not available.
- b. Fiscal year 2009 data are not available for Hawaii and Utah. Fiscal year 2007 data have been substituted.
- c. Fiscal year 2009 data are not available for Massachusetts, Missouri, Pennsylvania, and Wisconsin. Fiscal year 2008 data have been substituted.

CONTACT: Loan Swisher (410) 786-4650 or statistics@ssa.gov.



Other Social Insurance Programs and Veterans' Benefits

Other Social Insurance Programs

Unemployment Insurance	9.1
Workers' Compensation	9.3
Temporary Disability Insurance	9.9
Black Lung Benefits	9.10

Veterans' Benefits	9.12
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9.A Other Social Insurance Programs: Unemployment Insurance

Table 9.A2—Summary data on state programs, by state or other area, 2009

State or area	Covered employment (excludes federal government)		Insured unem- ployment as percent of covered employ- ment ^a	Number of first payments	Average weekly benefit for total unemployment		Average weekly insured unem- ployment	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			
Total	126,466	5,679,684	4.5	14,172,822	309.60	35.8	5,723,941	18.8	7,530,223	55.3	28,182	79,550	2.3
Alabama	1,775	68,336	4.0	195,672	208.04	28.1	71,110	16.5	83,432	41.9	207	651	1.5
Alaska	297	13,664	4.8	34,157	234.86	26.5	14,275	22.0	20,806	58.2	103	170	1.8
Arizona	2,340	99,095	4.3	242,508	220.17	27.0	100,174	18.5	131,350	64.5	224	1,001	1.3
Arkansas	1,113	39,152	5.1	141,925	281.53	41.6	57,184	16.8	66,863	47.8	246	620	2.5
California	14,377	737,852	5.4	1,778,757	310.56	31.5	777,733	20.4	1,066,905	62.4	4,083	11,455	4.2
Colorado	2,148	99,532	3.2	186,153	360.96	40.5	69,771	16.0	103,182	66.0	335	1,062	1.6
Connecticut	1,596	92,085	5.2	223,342	342.16	30.8	83,599	19.4	101,593	48.9	568	1,313	3.1
Delaware	397	18,871	3.9	35,218	261.80	28.6	15,609	22.0	20,152	56.1	82	208	2.0
District of Columbia	482	34,195	1.4	34,259	303.01	22.2	6,947	20.4	19,273	64.8	109	217	2.1
Florida	7,050	285,671	4.1	680,061	237.58	30.5	290,301	19.2	468,595	70.7	758	3,098	1.5
Georgia	3,696	156,156	4.2	409,873	283.03	34.8	155,360	15.3	237,433	57.7	483	1,718	1.7
Hawaii	559	22,355	3.6	50,721	423.02	55.0	20,187	18.9	22,743	46.5	44	391	0.7
Idaho	600	20,173	5.6	92,187	275.40	42.6	33,707	16.6	46,796	50.7	130	396	1.3
Illinois	5,465	262,711	5.1	661,955	327.86	35.5	281,314	20.6	348,987	56.2	1,437	4,418	2.4
Indiana	2,666	101,182	4.7	354,471	306.90	42.1	126,247	17.1	215,551	58.1	444	1,831	2.6
Iowa	1,427	52,680	3.7	165,030	319.76	45.0	52,398	15.6	63,657	39.9	335	792	1.5
Kansas	1,291	48,760	3.7	123,178	354.38	48.8	47,732	18.1	63,547	58.8	201	744	1.4
Kentucky	1,671	62,739	4.4	191,181	307.64	42.6	72,898	19.0	80,622	40.5	368	1,064	3.1
Louisiana	1,817	73,003	3.0	136,503	230.74	29.9	54,297	16.6	51,284	46.8	145	455	1.4
Maine	567	20,361	3.7	55,232	281.62	40.8	21,245	17.0	25,294	47.7	84	259	1.6
Maryland	2,329	113,040	3.6	187,148	310.90	33.3	83,835	18.8	93,347	51.4	381	1,089	2.0
Massachusetts	3,087	172,995	4.7	352,631	419.18	38.9	144,271	20.1	191,724	57.0	1,429	2,755	3.6
Michigan	3,721	161,450	7.1	652,819	308.68	37.0	263,540	19.4	363,741	53.7	1,303	3,785	4.6
Minnesota	2,536	114,340	4.2	252,468	359.95	41.5	105,830	19.6	134,061	57.4	721	1,691	1.5
Mississippi	1,054	34,991	4.1	102,315	195.63	30.7	43,692	17.4	47,765	47.1	88	345	1.3
Missouri	2,550	100,960	3.9	241,057	256.41	33.7	99,566	18.4	121,161	52.1	530	1,140	2.0
Montana	407	13,415	4.6	41,524	270.27	42.7	18,862	20.3	21,588	52.1	70	209	0.9
Nebraska	885	32,097	2.2	60,656	249.45	35.8	19,604	13.9	29,714	55.0	90	219	1.3
Nevada	1,120	47,528	6.4	181,563	317.36	38.9	71,967	19.4	110,770	62.7	294	1,095	1.3
New Hampshire	597	26,659	3.8	57,473	282.65	32.9	22,432	16.9	20,605	39.7	79	269	2.2
New Jersey	3,712	203,895	5.4	469,715	395.73	37.5	200,581	20.9	284,292	62.0	1,774	3,659	2.1
New Mexico	760	28,429	3.8	62,746	300.29	41.7	28,773	19.5	36,031	63.7	86	362	1.1
New York	8,217	473,769	4.2	803,525	314.51	28.4	345,815	20.3	424,295	54.8	2,147	4,970	3.7
North Carolina	3,756	148,370	5.4	544,491	306.70	40.4	204,285	17.1	310,305	60.4	736	2,555	1.7
North Dakota	340	12,047	1.9	22,013	310.52	45.6	6,547	13.7	8,152	37.9	51	99	1.0

(Continued)

9.A Other Social Insurance Programs: Unemployment Insurance

Table 9.A2—Summary data on state programs, by state or other area, 2009—Continued

State or area	Covered employment (excludes federal government)		Insured unem- ployment as percent of covered employ- ment ^a	Number of first payments	Average weekly benefit for total unemployment		Average weekly insured unem- ployment	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	4,866	197,125	4.7	503,921	321.01	41.2	228,890	19.9	247,778	48.2	1,018	2,942	2.7
Oklahoma	1,451	52,872	2.9	107,524	295.38	42.2	41,716	17.2	50,869	54.9	123	574	0.7
Oregon	1,578	63,646	6.9	260,274	313.26	40.4	109,420	19.5	140,625	53.5	523	1,625	1.9
Pennsylvania	5,363	238,310	6.1	782,870	352.16	41.2	328,830	19.6	355,542	47.4	1,855	4,827	4.6
Rhode Island	439	18,755	5.0	55,512	382.96	46.6	22,032	19.2	34,632	61.4	185	409	3.4
South Carolina	1,734	63,031	5.4	224,111	250.08	35.8	94,021	17.1	126,887	56.9	236	946	2.1
South Dakota	378	12,356	1.5	17,428	253.90	40.4	5,574	13.7	3,922	25.3	29	66	1.0
Tennessee	2,515	100,036	3.9	279,980	226.36	29.6	98,802	17.3	153,091	53.3	614	1,099	3.2
Texas	9,952	451,182	2.6	713,662	324.98	37.3	259,740	17.4	374,253	59.7	1,085	3,837	1.3
Utah	1,121	42,536	3.1	98,998	320.77	44.0	34,706	16.0	49,180	55.1	114	489	0.6
Vermont	286	10,945	4.5	38,373	306.33	41.6	12,983	17.4	13,325	35.8	62	196	3.3
Virginia	3,379	157,691	2.4	229,868	304.01	33.9	82,540	15.9	116,585	53.1	303	1,073	1.2
Washington	2,764	129,983	5.0	345,913	401.51	44.4	138,412	18.9	154,773	47.9	886	2,597	1.4
West Virginia	668	23,990	4.1	77,262	271.76	39.4	27,309	16.5	26,510	38.1	167	343	2.7
Wisconsin	2,614	101,802	6.1	447,970	287.50	38.4	158,372	17.0	170,298	39.5	621	1,932	2.6
Wyoming	267	10,746	3.1	28,772	347.40	44.9	8,237	16.5	12,241	53.2	48	166	1.2
Outlying areas													
Puerto Rico	940	24,216	6.3	132,368	115.34	23.3	59,384	20.5	62,067	48.4	152	304	3.1
U.S. Virgin Islands	43	1,568	3.0	3,489	327.34	46.5	1,287	18.9	2,029	64.4	1	20	0.2

SOURCES: Department of Labor, Employment and Training Administration and Bureau of Labor Statistics; based on data submitted by state agencies.

NOTES: Except where noted, excludes data for federal employees and for ex-servicemembers; includes data for state and local government employees where covered by state law after 1955.

Totals do not necessarily equal the sum of rounded components.

- Based on average covered employment in 12-month period.
- Contributions, penalties, and interest from employers and contributions from employees in states taxing workers; adjusted to exclude refunds of contributions and dishonored checks; excludes state and local government employees covered on reimbursable basis.
- Adjusted to exclude voided benefit checks and for transfers under interstate combined-wage plan; excludes Extended Benefits and Emergency Unemployment Compensation.
- Estimated data. Contribution rate as a percentage of taxable payroll; excludes state and local jurisdictions covering state and local government employees on a reimbursable basis. Standard contribution rate for most states, 2.7 percent.
- Total wages earned in covered employment during all pay periods ended within the year.
- Includes dependents' allowances for states that provide such benefits.
- Based on average total weekly wage in current year.
- Percentages based on first payments for 12-month period.

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9.B Other Social Insurance Programs: Workers' Compensation

Table 9.B1—Coverage, benefits, and costs, selected years 1940–2009

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 ^b	Medical and hospitalization	Compensation payments		
1940	24.6	256	135	73	48	95	161	1.19	0.72
1946	32.7	434	270	96	68	140	294	0.91	0.54
1948	36.0	534	335	121	78	175	359	0.96	0.51
1949	35.3	566	353	132	81	185	381	0.98	0.55
1950	36.9	615	381	149	85	200	415	0.89	0.54
1951	38.7	709	444	170	94	233	476	0.90	0.54
1952	39.4	785	491	193	101	260	525	0.94	0.55
1953	40.7	841	524	210	107	280	561	0.97	0.55
1954	39.8	876	540	225	110	308	568	0.98	0.57
1955	41.4	916	563	238	115	325	591	0.91	0.55
1956	43.0	1,002	618	259	125	350	652	0.92	0.55
1957	43.3	1,062	661	271	130	360	702	0.91	0.56
1958	42.5	1,112	694	285	132	375	737	0.91	0.58
1959	44.0	1,210	753	316	141	410	800	0.89	0.58
1960	44.9	1,295	810	325	160	435	860	0.93	0.59
1961	45.0	1,374	851	347	176	460	914	0.95	0.61
1962	46.2	1,489	924	371	194	495	994	0.96	0.62
1963	47.3	1,582	988	388	207	525	1,057	0.99	0.62
1964	48.8	1,707	1,070	412	226	565	1,142	1.00	0.63
1965	50.8	1,814	1,124	445	244	600	1,214	1.00	0.61
1966	53.7	2,000	1,239	486	275	680	1,320	1.02	0.61
1967	55.0	2,189	1,363	524	303	750	1,439	1.07	0.63
1968	56.8	2,376	1,482	556	338	830	1,546	1.07	0.62
1969	59.0	2,634	1,641	607	386	920	1,714	1.08	0.62
1970	59.2	3,031	1,843	755	432	1,050	1,981	1.11	0.66
1971	59.4	3,563	2,005	1,098	460	1,130	2,433	1.11	0.67
1972	62.3	4,061	2,179	1,379	504	1,250	2,811	1.14	0.68
1973	66.3	5,103	2,514	1,998	592	1,480	3,623	1.17	0.70
1974	68.0	5,781	2,971	2,086	724	1,760	4,021	1.24	0.75
1975	67.2	6,598	3,422	2,324	852	2,030	4,568	1.32	0.83
1976	69.6	7,584	3,976	2,570	1,039	2,380	5,204	1.49	0.87
1977	72.1	8,630	4,629	2,750	1,250	2,680	5,950	1.71	0.92
1978	75.6	9,796	5,256	3,043	1,497	2,980	6,816	1.86	0.94
1979	78.6	12,027	6,157	4,022	1,848	3,520	8,507	1.95	1.01
1980	78.8	13,618	7,029	4,330	2,259	3,947	9,671	1.96	1.07
1981	78.3	15,054	7,876	4,595	2,583	4,431	10,623	1.85	1.08
1982	77.0	16,407	8,647	4,768	2,993	5,058	11,349	1.75	1.16
1983	78.0	17,575	9,265	5,061	3,249	5,681	11,894	1.67	1.17
1984	81.9	19,685	10,610	5,405	3,671	6,424	13,261	1.66	1.21
1985	84.3	22,217	12,341	5,744	4,132	7,498	14,719	1.82	1.30
1986	86.0	24,613	13,827	6,248	4,538	8,642	15,971	1.99	1.37
1987	88.4	27,318	15,453	6,782	5,082	9,912	17,406	2.07	1.43
1988	91.3	30,733	17,512	7,477	5,744	11,518	19,215	2.16	1.49
1989	93.7	34,316	19,918	7,965	6,433	13,424	20,892	2.04	1.46
1990	95.1	38,238	22,222	8,658	7,358	15,187	23,051	2.13	1.57
1991	93.6	42,169	24,515	9,711	7,944	16,832	25,337	2.16	1.65
1992	94.6	44,660	24,030	10,987	9,643	18,252	26,408	2.13	1.69
1993	96.1	42,925	21,773	11,294	9,857	17,521	25,403	2.17	1.62
1994	109.4	43,482	21,391	10,564	11,527	17,194	26,288	2.05	1.47
1995	112.8	42,122	20,106	10,784	11,232	16,733	25,389	1.83	1.35
1996	114.8	41,960	21,024	11,108	9,828	16,739	25,221	1.66	1.26
1997	118.1	41,971	21,676	9,937	10,357	17,397	24,574	1.49	1.17
1998	121.5	43,987	23,579	10,055	10,354	18,622	25,365	1.38	1.13
1999	124.3	46,313	26,383	9,945	9,985	20,055	26,258	1.35	1.12

(Continued)

9.B Other Social Insurance Programs: Workers' Compensation

Table 9.B1—Coverage, benefits, and costs, selected years 1940–2009—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 ^b	Medical and hospitalization	Compensation payments		
2000	127.1	47,699	26,874	10,345	10,481	20,933	26,766	1.34	1.06
2001	127.0	50,827	27,905	11,082	11,839	23,137	27,690	1.43	1.10
2002	125.6	52,297	28,085	12,293	11,920	24,203	28,094	1.57	1.13
2003	124.7	54,739	28,395	13,627	12,717	25,733	29,006	1.71	1.16
2004	125.9	56,149	28,632	14,402	13,115	26,079	30,070	1.70	1.13
2005 ^e	128.2	57,067	29,039	14,318	13,710	26,361	30,706	1.71	1.09
2006 ^e	130.3	55,118	28,050	13,822	13,246	26,325	28,793	1.57	0.99
2007 ^e	131.7	55,998	28,736	13,663	13,599	27,037	28,961	1.46	0.96
2008 ^e	130.6	58,104	30,175	13,862	14,067	29,256	28,848	1.34	0.98
2009	124.9	58,327	30,460	13,661	14,207	28,940	29,387	1.30	1.03

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.

NOTES: Beginning in 1959, includes Alaska and Hawaii. States periodically update prior-year data, and any such changes are included in the current table.

Totals do not necessarily equal the sum of rounded components.

- Total costs to employers who purchase insurance from private carriers and state funds consist of premiums written in the calendar year plus the payments made under deductible provisions. For self-insured employers, the costs include benefit payments and administrative costs.
- Cash and medical benefits paid by self-insurers.
- Net cash and medical benefits paid during calendar year by private insurance companies under standard workers' compensation policies.
- Net cash and medical benefits paid by competitive and exclusive state funds and federal benefits, including those paid under the Federal Employees' Compensation Act for civilian employees; the portion of the Black Lung benefit program that is financed by employers; and a portion of benefits under the Longshore and Harbor Workers' Compensation Act that are not reflected in state data, namely, benefits paid by self-insured employers and by special funds under the LHWCA.
- The National Academy of Social Insurance has revised its estimates for 2005–2008. For details, see Appendix D, *Workers' Compensation: Benefits, Coverage, and Costs, 2009* (<http://www.nasi.org/research/2011/report-workers-compensation-benefits-coverage-costs-2009>).

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9.B Other Social Insurance Programs: Workers' Compensation

Table 9.B2—Benefits, by state and federal program, 2005–2009 (in thousands of dollars)

Program	2005 ^a	2006 ^a	2007 ^a	2008 ^a	2009
Total, state and federal	57,066,950	55,117,823	55,997,632	58,104,190	58,326,816
<i>State programs</i>					
Subtotal	53,808,795	51,847,502	52,657,740	54,680,365	54,784,211
Alabama	619,518	624,685	635,315	656,607	625,755
Alaska	182,721	186,507	188,286	205,363	213,372
Arizona	570,870	647,427	696,457	691,001	650,730
Arkansas	227,232	235,887	243,846	233,270	216,216
California	10,868,330	9,952,220	9,551,491	9,466,406	9,317,794
Colorado	932,350	903,947	878,774	916,801	884,044
Connecticut	719,974	718,441	729,815	778,187	834,673
Delaware	214,540	238,638	212,706	218,484	205,972
District of Columbia	92,298	90,468	86,101	80,168	91,940
Florida	3,474,068	2,925,976	2,915,447	2,835,433	2,977,465
Georgia	1,408,876	1,393,970	1,494,363	1,577,091	1,492,696
Hawaii	250,779	242,685	247,294	245,763	244,375
Idaho	242,823	253,639	267,761	280,810	266,461
Illinois	2,418,519	2,444,219	2,738,920	2,921,600	2,979,286
Indiana	569,215	563,934	599,391	625,807	611,792
Iowa	487,130	488,684	495,808	555,372	556,817
Kansas	389,566	390,643	394,280	414,578	418,656
Kentucky	702,751	637,975	648,237	702,125	737,392
Louisiana	705,254	718,535	732,586	855,021	839,580
Maine	280,841	289,980	276,826	263,784	263,512
Maryland	784,414	828,962	849,850	935,948	895,905
Massachusetts	921,958	929,507	902,630	855,807	950,390
Michigan	1,473,598	1,470,574	1,511,282	1,407,282	1,509,881
Minnesota	949,394	944,448	958,984	1,025,937	1,082,620
Mississippi	289,855	310,742	322,875	336,103	318,499
Missouri	892,446	831,325	871,060	906,393	834,075
Montana	227,342	234,259	242,872	253,477	254,118
Nebraska	305,988	271,992	284,259	323,702	304,156
Nevada	456,660	417,282	414,432	430,260	432,690
New Hampshire	228,623	220,037	208,422	241,411	230,971
New Jersey	1,702,109	1,748,045	1,849,044	1,951,545	2,002,875
New Mexico	259,259	270,273	273,363	271,396	282,633
New York	3,378,085	3,510,955	3,388,936	3,859,233	4,146,728
North Carolina	1,381,606	1,314,725	1,344,761	1,455,740	1,408,926
North Dakota	82,033	81,297	91,741	105,837	110,526
Ohio	2,447,038	2,383,544	2,478,080	2,490,080	2,353,384
Oklahoma	638,043	675,113	700,341	772,191	824,855
Oregon	554,586	568,739	589,388	607,414	623,095
Pennsylvania	2,741,310	2,758,784	2,803,819	2,902,243	2,901,339
Rhode Island	137,196	149,413	152,227	158,721	157,720
South Carolina	924,734	918,650	886,000	917,419	891,830
South Dakota	86,118	109,030	119,567	111,184	93,578
Tennessee	861,927	815,935	751,377	783,149	783,903
Texas	1,596,879	1,419,823	1,425,946	1,538,972	1,595,358
Utah	256,802	261,400	285,395	302,453	295,624
Vermont	122,028	124,228	119,099	127,665	144,054
Virginia	851,776	808,701	1,070,668	1,112,443	873,483
Washington	1,847,523	1,927,431	1,995,744	2,192,885	2,312,186
West Virginia	765,208	433,258	510,806	488,013	490,531
Wisconsin	1,170,065	1,043,244	1,094,074	1,154,654	1,113,240
Wyoming	116,537	117,324	126,996	137,135	136,515

(Continued)

9.B Other Social Insurance Programs: Workers' Compensation

Table 9.B2—Benefits, by state and federal program, 2005–2009 (in thousands of dollars)—Continued

Program	2005 ^a	2006 ^a	2007 ^a	2008 ^a	2009
<i>Federal programs ^b</i>					
Subtotal	3,258,155	3,270,322	3,339,892	3,423,825	3,542,605
Civilian employee	2,462,059	2,454,861	2,586,700	2,676,370	2,763,885
Other	796,096	815,461	753,192	747,455	778,720

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.

NOTES: States periodically update prior-year data, and any such changes are included in the current table.

Totals do not necessarily equal the sum of rounded components.

- a. The National Academy of Social Insurance has revised its estimates for 2005–2008. For details, see Appendix D, *Workers' Compensation: Benefits, Coverage, and Costs, 2009* (<http://www.nasi.org/research/2011/report-workers-compensation-benefits-coverage-costs-2009>).
- b. 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.

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9.B Other Social Insurance Programs: Workers' Compensation

**Table 9.B3—Benefits paid by type of insurer and medical benefits paid, by state and federal program, 2009
(in thousands of dollars)**

Program	Benefits paid by type of insurer				Medical benefits paid	
	Total ^a	Private carriers ^b	State funds	Self-insurance ^c	Total	As a percentage of total benefits
Total, state and federal	58,326,816	30,459,597	10,118,061	14,206,553	28,940,005	49.6
State programs						
Subtotal	54,784,211	30,459,597	10,118,061	14,206,553	27,900,839	50.9
Alabama	625,755	297,824	...	327,930	423,010	67.6
Alaska	213,372	156,254	...	57,119	141,679	66.4
Arizona	650,730	225,639	315,649	109,442	404,103	62.1
Arkansas	216,216	150,642	...	65,574	142,270	65.8
California	9,317,794	4,814,138	1,607,715	2,895,941	5,065,094	54.4
Colorado	884,044	245,494	385,554	252,997	443,790	50.2
Connecticut	834,673	621,327	...	213,347	363,083	43.5
Delaware	205,972	160,236	...	45,736	113,491	55.1
District of Columbia	91,940	78,046	...	13,894	34,477	37.5
Florida	2,977,465	1,924,139	...	1,053,326	1,917,488	64.4
Georgia	1,492,696	1,097,153	...	395,543	737,392	49.4
Hawaii	244,375	131,780	30,571	82,023	105,081	43.0
Idaho	266,461	85,223	149,948	31,291	163,607	61.4
Illinois	2,979,286	2,256,602	...	722,684	1,427,078	47.9
Indiana	611,792	544,868	...	66,924	434,984	71.1
Iowa	556,817	434,115	...	122,702	300,681	54.0
Kansas	418,656	306,423	...	112,233	247,844	59.2
Kentucky	737,392	387,820	116,655	232,917	421,051	57.1
Louisiana	839,580	434,395	135,109	270,075	455,052	54.2
Maine	263,512	90,499	96,250	76,762	121,742	46.2
Maryland	895,905	463,558	210,192	222,156	399,574	44.6
Massachusetts	950,390	748,427	...	201,963	325,480	34.2
Michigan	1,509,881	958,184	...	551,697	533,944	35.4
Minnesota	1,082,620	760,135	54,046	268,439	564,005	52.1
Mississippi	318,499	184,327	...	134,171	188,870	59.3
Missouri	834,075	556,200	84,185	193,689	456,239	54.7
Montana	254,118	84,905	127,934	41,279	144,339	56.8
Nebraska	304,156	236,868	...	67,287	184,014	60.5
Nevada	432,690	293,133	...	139,557	199,470	46.1
New Hampshire	230,971	184,713	...	46,257	141,585	61.3
New Jersey	2,002,875	1,563,464	...	439,411	973,877	48.6
New Mexico	282,633	158,641	36,386	87,606	169,297	59.9
New York	4,146,728	1,797,434	1,096,455	1,252,838	1,990,429	48.0
North Carolina	1,408,926	1,059,199	...	349,728	629,790	44.7
North Dakota	110,526	...	110,526	...	66,866	60.5
Ohio	2,353,384	20,968	1,925,330	407,086	998,833	42.4
Oklahoma	824,855	369,263	262,060	193,532	356,337	43.2
Oregon	623,095	237,286	278,987	106,822	324,009	52.0
Pennsylvania	2,901,339	1,975,878	310,215	615,246	1,333,716	46.0
Rhode Island	157,720	56,795	79,856	21,069	52,678	33.4
South Carolina	891,830	651,014	56,633	184,183	368,326	41.3
South Dakota	93,578	90,019	...	3,558	61,200	65.4
Tennessee	783,903	605,574	...	178,329	422,524	53.9
Texas	1,595,358	917,000	348,518	329,840	950,833	59.6
Utah	295,624	109,973	136,676	48,975	204,276	69.1
Vermont	144,054	124,564	...	19,490	71,163	49.4
Virginia	873,483	658,203	...	215,280	505,747	57.9
Washington	2,312,186	19,007	1,756,175	537,003	807,719	34.9
West Virginia ^d	490,531	173,769	271,671	45,091	177,581	36.2
Wisconsin	1,113,240	956,730	...	156,511	765,593	68.8
Wyoming	136,515	1,751	134,764	...	69,525	50.9

(Continued)

9.B Other Social Insurance Programs: Workers' Compensation

Table 9.B3—Benefits paid by type of insurer and medical benefits paid, by state and federal program, 2009 (in thousands of dollars)—Continued

Program	Benefits paid by type of insurer				Medical benefits paid	
	Total ^a	Private carriers ^b	State funds	Self-insurance ^c	Total	As a percentage of total benefits
Federal programs ^e						
Subtotal	3,542,605	...	...	...	1,039,167	29.3
Civilian employee	2,763,885	...	...	...	863,729	31.3
Other	778,720	...	...	...	175,438	22.5

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.

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

... = not applicable.

- These data may not include second injury fund for all states and may understate total payments.
- States with exclusive funds (North Dakota, Ohio, Washington, and Wyoming) may have small amounts of benefits paid by private carriers. This is because some employers doing business in states with exclusive funds may be required by Longshore and Harbor Workers' Compensation Act (LHWCA) provisions to obtain coverage from private carriers, or may obtain employer's liability coverage that the state fund is not authorized to provide. In addition, private carriers may provide excess compensation coverage in some of these states.
- Includes individual self-insurers and group self-insurance.
- In 2008, West Virginia completed the transition from an exclusive state fund to a competitive fund. All benefits for workers injured after the transition are paid by private carriers.
- 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 LHWCA that are not reflected in state data, namely, benefits paid by self-insured employers and special funds under the LHWCA.

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9.C Other Social Insurance Programs: Temporary Disability Insurance

Table 9.C1—Selected data on state and railroad programs, 2008

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	13,058	540,400	--	--	--	--	4,793.7	259.2
State-operated fund	12,539	508,400	97.9	416.58	14.13	3,947.7	4,072.0	206.1
Private plans	519	32,000	--	644.27	11.14	285.2	216.2	53.1
Hawaii ^d (private plans)	430	10,845	--	295.13	5.83	54.6	80.0	--
New Jersey	^e 3,475	--	--	--	--	--	593.4	^f 35.9
State-operated fund	^e 2,853	^e 67,000	--	399.00	10.10	549.3	445.5	^f 33.8
Private plans	^e 622	--	--	--	--	--	147.9	^f 2.1
New York	7,246	^g 48,077	40.1	194.86	7.71	--	406.3	^h 7.8
Special state fund ⁱ	...	...	0.2	170.00	12.77	--	1.9	--
Private plans ^j	7,246	48,077	39.9	195.00	7.70	--	^k 404.5	--
Puerto Rico	--	--	--	--	--	--	--	--
State-operated fund	--	--	--	--	--	--	--	--
Private plans	--	--	--	--	--	--	--	--
Rhode Island (state-operated fund)	412	12,900	8.5	393.00	10.60	167.7	171.1	8.0
Railroad (publicly operated fund)	235	3,689	^l 4.6	^m 293.75	^m 13.00	ⁿ	^o 45.1	ⁿ

SOURCES: State agencies and Railroad Retirement Board.

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

... = 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 2008.
- d. Includes data not shown separately for special fund for workers whose disability begins during unemployment. In 2008, the fund paid \$82,976 in benefits.
- e. Estimated data.
- f. State fiscal year data (July 1–June 30).
- g. First \$7,000 of earnings of each employee, which was paid by the employer during the calendar year.
- h. State fiscal year data (April 1–March 31).
- i. For workers whose disability begins during unemployment.
- j. Includes State Insurance Fund of \$11.5 million.
- k. Indemnity benefits only.
- l. For 14-day registration period.
- m. For benefit year 2007–2008 (July 1, 2007–June 30, 2008).
- n. Single system of contributions and administrative operations for railroad unemployment insurance and temporary disability; collections amounted to \$91.3 million and administrative expenses to \$15.7 million for the system in 2008.
- o. Of this amount, \$41.6 million was for regular benefits and \$3.5 million for extended benefits.

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9.D Other Social Insurance Programs: Black Lung Benefits

Table 9.D1—Benefits currently payable to miners, widows, and dependents, December 1970–2010

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
2004	52,362	6,009	40,727	5,626	29,460	376,374
2005	46,609	4,972	37,099	4,538	26,399	340,187
2006	40,018	4,217	32,168	3,633	24,282	312,461
2007	36,231	3,447	28,231	4,553	21,699	282,380
2008	32,411	2,912	25,110	4,389	19,875	255,892
2009	28,558	2,416	21,931	4,211	17,975	232,002
2010	25,293	2,014	19,230	4,049	16,114	208,123

SOURCE: Department of Labor, Beneficiary Master Table, 100 percent data.

a. Includes wives of living miners, divorced wives, children, and dependent brothers and sisters of miners.

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9.D Other Social Insurance Programs: Black Lung Benefits

Table 9.D2—Benefits currently payable to miners, widows, and dependents, by state or other area, December 2010

State or area	Number				Monthly amount (thousands of dollars)		
	Total	Miners	Widows	Dependents ^a	Total	Miners ^b	Widows ^c
All areas	25,293	2,014	19,230	4,049	16,114	1,586	14,528
Alabama	941	34	730	177	597	28	570
Alaska	6	^d	^d	^d	4	^d	^d
Arizona	77	5	69	3	49	4	46
Arkansas	126	5	109	12	79	3	76
California	128	5	104	19	80	3	76
Colorado	162	7	137	18	103	6	98
Connecticut	44	0	38	6	28	0	28
Delaware	34	^d	27	^d	21	^d	^d
District of Columbia	5	0	5	0	3	0	3
Florida	550	32	442	76	349	27	322
Georgia	143	5	114	24	89	4	85
Hawaii	^d	^d	^d	^d	^d	^d	^d
Idaho	12	^d	^d	^d	8	^d	^d
Illinois	689	28	554	107	434	23	411
Indiana	461	23	349	89	293	18	275
Iowa	75	3	61	11	48	3	46
Kansas	26	0	23	3	17	0	17
Kentucky	3,974	526	2,794	654	2,561	414	2,147
Louisiana	15	0	12	3	9	0	9
Maine	^d	^d	^d	^d	^d	^d	^d
Maryland	246	13	183	50	156	10	146
Massachusetts	18	0	15	3	11	0	11
Michigan	273	10	209	54	172	7	164
Minnesota	8	^d	^d	^d	5	^d	^d
Mississippi	22	^d	17	^d	14	^d	^d
Missouri	85	0	73	12	53	0	53
Montana	28	^d	23	^d	18	^d	^d
Nebraska	4	^d	^d	^d	3	^d	^d
Nevada	22	^d	18	^d	14	^d	^d
New Hampshire	^d	^d	^d	^d	^d	^d	^d
New Jersey	177	6	147	24	111	4	106
New Mexico	52	^d	38	^d	33	^d	^d
New York	163	3	132	28	102	3	99
North Carolina	331	19	272	40	212	15	197
North Dakota	0	0	0	0	0	0	0
Ohio	1,611	70	1,241	300	1,016	57	959
Oklahoma	91	5	78	8	58	4	54
Oregon	18	^d	11	^d	10	^d	^d
Pennsylvania	5,413	321	4,350	742	3,424	246	3,178
Rhode Island	3	0	3	0	2	0	2
South Carolina	120	7	94	19	76	6	71
South Dakota	0	0	0	0	0	0	0
Tennessee	1,103	73	834	196	696	58	638
Texas	94	7	68	19	57	5	52
Utah	102	^d	78	^d	64	^d	^d
Vermont	3	0	3	0	2	0	2
Virginia	2,310	279	1,694	337	1,488	220	1,268
Washington	34	^d	28	^d	21	^d	^d
West Virginia	5,409	503	3,958	948	3,471	402	3,070
Wisconsin	15	^d	^d	^d	9	^d	^d
Wyoming	34	0	30	4	21	0	21
Outlying areas ^e	32	^d	24	^d	21	^d	^d

SOURCE: Department of Labor, Beneficiary Master Table, 100 percent data.

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

- a. Includes wives of living miners, divorced wives, children, and dependent brothers and sisters of miners.
- b. Includes benefits for wives and children.
- c. Includes benefits for surviving children, brothers, sisters, and divorced wives. Prior to December 1997, monthly payments for surviving children were included with payments to miners.
- d. Suppressed to avoid disclosing information about particular individuals.
- e. Includes beneficiaries residing in American Samoa, Guam, Northern Mariana Islands, Puerto Rico, U.S. Virgin Islands, and foreign countries.

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9.F Veterans' Benefits

Table 9.F1—Number of disability compensation or pension payments, by type of payment and age of beneficiary, selected years 1940–2010 (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 1940–2010 (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
2004	2,899	2,556	1,708	1,373	335	848	690	158	343	146	197
2005	2,973	2,637	1,792	1,421	371	845	677	168	336	151	185
2006	3,056	2,726	1,875	1,474	401	851	674	177	330	154	176
2007	3,167	2,844	1,974	1,540	434	869	681	188	323	153	170
2008	3,270	2,952	2,069	1,596	472	883	684	199	318	152	166
2009	3,384	3,070	2,154	1,640	514	916	697	218	314	148	166
2010	3,524	3,210	2,235	1,680	555	974	727	247	314	143	170

SOURCE: Department of Veterans Affairs, published and unpublished data.

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

... = 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.
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.

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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 small number of tables in sections 5 and 6 present Old-Age, Survivors, and Disability Insurance (OASDI) current-pay benefit and award data based on 1 percent and 10 percent sample files drawn from the Social Security Administration's administrative records. In addition, Tables 4.B1–4.B14 on the taxable earnings of OASDI workers are based on 1 percent administrative record samples.

Because of sampling variability, estimates based on sample data differ from the figures that would have been obtained had all, rather than specified samples, of the records been used. The standard error is a measure of the sampling variability. About 68 percent of all possible probability samples selected with the same specifications will give estimates within one standard error of the figure obtained from a compilation of all records. Similarly, approximately 90 percent will give estimates within 1.645 standard errors, about 95 percent will give estimates within two standard errors, and about 99 percent will give estimates within two and one-half standard errors. The standard error of an estimate depends on the design elements such as the method of sampling, sample size, and the estimation process.

Because of the large number of data cells tabulated from the sample files, it is not practical to calculate the standard error for every possible cell. However, standard errors for a large number of cells were estimated. These estimates were used to fit regression curves to provide estimates of approximate standard errors associated with tabulated counts and proportions.

The tables showing the sampling variability provide a general order of magnitude for similar estimates from the various sample files. Table A-1 presents approximate standard errors for the estimated number of persons from the 1 percent and the 10 percent files. The reliability of an estimated percentage depends on both the size of the percentage and on the size of the total on which the percentage is based. Data in Table A-2 provide approximations of the standard errors of the estimated percentage of persons in the 1 percent and 10 percent files. The standard errors are expressed in percentage points and the bases shown are in terms of inflated data.

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Table A-1.
Approximations of standard errors of estimated number of persons

Size of estimate (inflated)	Standard error
1 percent file	
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
10 percent file	
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
1 percent file					
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
10 percent file					
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

Old-Age, Survivors, and Disability Insurance (OASDI) benefit award data in the *Annual Statistical Supplement* are derived mainly from two sources:

- **100 percent award data:** The Master Beneficiary Record (MBR) is the major administrative database for the Social Security program. It is used for the calculation of benefits and the maintenance of information about beneficiaries. Each month, when the MBR is updated, a record of award actions is created. This record is used to prepare award data on a 100 percent basis. Data available each month include types of benefits awarded, sex of beneficiary, and the monthly benefit amounts payable. These data are used to update the time-series tables.
- **Award data from the OASDI 1 percent sample:** This source provides monthly award data based on a 1 percent sample derived from the MBR. The 12 monthly files are combined to produce an annual file. The 1 percent sample is used to prepare award tables, which show detailed data by age, sex, and type of benefit, and distributions by benefit amount. Award data from the 1 percent sample are similar to the data described above. An important difference, however, is the treatment of dual entitlement.

When a retired-worker beneficiary subsequently becomes dually entitled to a secondary benefit as a wife, husband, or widow or widower, the secondary benefit is counted as an award in the 100 percent data. In contrast, award data that are based on the OASDI 1 percent sample do not count the secondary benefit as an award when both benefits are paid from the same trust fund.

When dual entitlements are counted as awards, the number of awardees is increased and the monthly amount awarded is lowered. The person has already been counted as having received an award when he or she became entitled to the retired-worker benefit and is counted again upon entitlement to the secondary benefit. The average benefit amount is lowered because the amount recorded for the award for the dually entitled person is only the difference between the amount of the retired-worker benefit and the amount of the secondary benefit.

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Appendix C: Poverty Data

Table 3.E1 presents weighted average poverty thresholds for families in the United States for 1959–2010. Table 3.E2 presents year-end data on the number and percentage of people in poverty in the United States for selected years 1959–2010. Tables 3.E3 and 3.E6 present more detailed data on people and families in poverty in the United States during 2010; Table 3.E4 presents similar data by current living arrangement. (Both poverty thresholds and poverty population data are issued by the Census Bureau.) Table 3.E8 presents poverty guidelines by family size for the contiguous United States, Alaska, and Hawaii for 1965–2011. (Poverty guidelines are issued by the Department of Health and Human Services.)

Poverty thresholds are used primarily for statistical purposes—to produce statistics on the number of Americans in poverty. Poverty guidelines are used for administrative purposes—for example, to determine whether a person or family is financially eligible for assistance or services under certain federal government programs (not including cash public assistance). Both the thresholds and the guidelines are sets of dollar figures that vary by family size and (in the case of the thresholds) family composition.

The poverty thresholds were developed in 1963 and 1964 by Mollie Orshansky of the Social Security Administration as a measure of income inadequacy. The poverty definition was modified in 1969 and in 1981 by federal interagency committees. The thresholds were based on ratios of food expenditure to money income (from the Department of Agriculture’s 1955 Household Food Consumption Survey) and the costs of the Department of Agriculture’s economy food plan for families of different sizes and compositions (see Carmen DeNavas-Walt, Bernadette D. Proctor, and Jessica C. Smith, “Income, Poverty, and Health Insurance Coverage in the United States: 2010,” Census Bureau, *Current Population Reports*, P60-239 [2011] Appendix B; and Joseph Dalaker and Bernadette D. Proctor, “Poverty in the United States: 1999,” Census Bureau, *Current Population Reports*, P60-210 [2000], Appendix A). Although the poverty thresholds in some sense represent families’ needs, the official poverty measure should be interpreted as a statistical yardstick rather than as a complete description of what people and families need to live.

The poverty thresholds have become the basis for the official statistics on the extent of poverty in the United States, which are issued annually by the Census Bureau in the *Current Population Reports* series. The thresholds are adjusted annually for price changes using the annual average Consumer Price Index for All Urban Consumers (CPI-U). (See Census Bureau, “Revision in Poverty Statistics, 1959 to 1968,” *Current Population Reports*,

Special Studies, P-23, No. 28 [1969]; and Department of Commerce, Office of Federal Statistical Policy and Standards, “Directive No. 14: Definition of Poverty for Statistical Purposes,” *Statistical Policy Handbook* [1978].) The thresholds are the same for all 50 states and the District of Columbia.

The poverty guidelines are a simplified version of the poverty thresholds. There are separate sets of guidelines for the two noncontiguous states (Hawaii and Alaska). The guidelines are used for determining whether a person or family is financially eligible for assistance or services under certain federal programs. Authorizing legislation or regulations for specific programs indicate whether a program uses the poverty guidelines as one of several eligibility criteria, uses a modification of the guidelines (for example, 125 percent or 185 percent of the guidelines), or uses them for the purpose of setting priorities in providing assistance or services.

Since 1973, the guidelines have been computed from the poverty thresholds by increasing the most recently published weighted average poverty thresholds by the percentage change in the CPI-U over the past year (more precisely, from the next most recent calendar year to the most recent calendar year) and rounding the figure for a family of four up to the next highest multiple of \$50. Figures for all family sizes over and under four persons are computed by adding or subtracting equal dollar amounts derived from the average difference between poverty lines for different family sizes (rounded to the nearest multiple of \$20).

As noted above, the poverty thresholds were developed in 1963 and 1964 by Mollie Orshansky of the Social Security Administration. In May 1965—just over a year after the Johnson administration had initiated the War on Poverty—the Office of Economic Opportunity adopted Orshansky’s thresholds as a working or quasi-official definition of poverty. At that time, the thresholds comprised a matrix of 124 detailed poverty thresholds based on the total number of family members, the number of family members who were related children under 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 CPI-U 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 Census Bureau, "Characteristics of the Population Below the Poverty Level: 1980," *Current Population Reports*, P-60, No. 133 [1982], pp. 2–5, 9, and 186.) As a result of these changes, the current matrix of poverty thresholds used by the Census Bureau to determine the poverty status of families and unrelated individuals consists of a set of 48 detailed thresholds arranged in a two-dimensional matrix by family size (number of family members, ranging from one person, that is, an unrelated individual, to nine or more persons) cross-classified by the presence and number of family members who are related children under 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 40 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," *Current Population Reports*, P60-205 (1999), that examined the effects of different resource definitions and thresholds on poverty and estimated several experimental poverty rates based on the NRC panel's recommendations. That report and subsequent updates are available on the Census Bureau's poverty measurement website at <http://www.census.gov/hhes/www/povmeas/data/index.html>.

In 2010, an interagency technical working group with representatives from the Bureau of Labor Statistics, the Census Bureau, the Economics and Statistics Administration, the Council of Economic Advisers, the Department of Health and Human Services, and the Office of Management and Budget examined ways to develop a Supplemental Poverty Measure (SPM). They drew on the recommendations of a 1995 National Academy of Science report and the extensive research on poverty measurement conducted over the preceding 15 years. The SPM will not replace the official poverty measure and will not be used to determine eligibility for government programs.

The SPM will use thresholds derived from Consumer Expenditure Survey data for food, shelter, clothing, and utilities. These thresholds vary by housing tenure (renter, homeowner with mortgage, homeowner without mortgage) and are adjusted for geographic differences in the cost of housing. The SPM defines resources as cash income plus any federal in-kind benefits that families can use to meet their food, clothing, shelter, and utility needs minus necessary expenses. The SPM defines necessary expenses as taxes, child support, work-related expenses (including child-care), and medical out-of-pocket expenses. The official poverty measure counts only persons related by birth, marriage, or adoption as members of the resource sharing unit, but the SPM also includes any unrelated children who are cared for by the family (such as foster children), and any cohabitators and their children. The new measure is intended to serve as an additional indicator of economic well-being in order to provide a deeper understanding of economic conditions and policy effects. For additional details, see http://www.census.gov/hhes/povmeas/methodology/supplemental/research/SPM_TWGObservations.pdf.

The Census Bureau's statistical experts, with assistance from the Bureau of Labor Statistics and in consultation with other agencies and outside experts, will be responsible for the measure's technical design. The Census Bureau published preliminary poverty estimates using the SPM in November 2011 (http://www.census.gov/hhes/povmeas/methodology/supplemental/research/Short_ResearchSPM2010.pdf).

Data on the poverty population and on family and personal income are collected in the Current Population Survey Annual Social and Economic Supplement

(CPS ASEC), formerly known as the March Supplement. Following the standard Census Bureau definition, *family* is defined as two or more persons related by birth, marriage, or adoption and residing together. *Income* refers to money income before federal, state, or local personal income taxes and excludes capital gains and lump-sum payments; however, public income transfers are included. Money income does not reflect that many families receive noncash benefits, such as employee use of business transportation and facilities, employer-paid health insurance and other employer-supported fringe benefits, Medicare, Medicaid, food stamps, and housing assistance. Many farm families receive benefits in the form of rent-free housing or goods produced and consumed by the family.

Every year between February and April, the sample of U.S. households interviewed in the monthly CPS is asked to provide information on household members' incomes during the preceding calendar year. Survey experience indicates that respondents tend to

underreport their income in household surveys. Underreporting is most pronounced for dividends, interest, and workers' compensation; less pronounced for veterans' payments, public assistance, and private pensions; and modest for Social Security and other federal retirement programs. The proportion of nonresponses to CPS income questions is greater among middle income and higher income families than among lower income families.

Because the CPS sample size, content, and procedures have changed several times, some differences in the data over time may in part reflect these methodological changes, not just changes in the population. Important changes to the CPS methodology took place for data years 1976, 1979, 1980, 1987, 1988, 1992, 1994, 1995, and 2000. The table below presents a summary of the methodological changes and provides references for more information concerning these changes. The report numbers, "P60-#," refer to the *Current Population Reports*, Consumer Income series.

Year	Methodological change	Reference
1959	First year for which poverty data are available. The poverty measure was developed in 1963 and 1964.	P60-210, Appendixes
1969	Modification of poverty measure. Bureau of the Budget prescribed the new measure as the official poverty measure for statistical use in federal agencies.	P60-68, pp. 11–12
1979	"Householder" concept first implemented, replacing "head" concept—the husband is no longer automatically the family reference person. Secondary families (people who are related to each other but not the householder) are tallied separately from "families." Change in universe—income questions no longer asked of 14-year-olds. Poverty universe changed—people under 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
1992	Estimates first weighted using 1990 Census results.	P60-188, p. vii
1994	Computer-assisted interviewing replaced pencil-and-paper interviewing.	P60-189, p. vii
1994–1995	New CPS sample design.	P60-189, p. vii and Table D-3; P60-194, pp. v and xiii and Table D-3
1995	Revised edit and allocation procedures for race groups.	P60-194, pp. v and xiii
2000	Expansion of CPS sample interviewed from about 50,000 households to about 78,000 households nationwide. Poverty data for 2000 and 2001 from sample expansion first published in P60-219, "Poverty in the United States: 2001." In the same report, data were weighted using Census 2000 results.	P60-219, Appendix B
2002	For the first time, the CPS ASEC of 2003 recorded multiple categories for respondents who identified themselves with more than one race. We do not know how people who reported more than one race in 2002 previously reported their race. Therefore, there is no single way to compare changes to poverty by race between 2001 and 2002. The "Asian or Pacific Islander" race category was divided into two groups: "Asians" and "Native Hawaiians and Other Pacific Islanders."	P60-222, pp. 2–3, 5

For details about how questionnaire changes and file processing changes affected the data, see Edward J. Welniak Jr., "Effects of the March Current Population Survey's New Processing System on Estimates of Income and Poverty," paper presented at the annual meeting of the American Statistical Association (1990).

Further details about CPS methodology may be found in Technical Paper 63RV, available at <http://www.bls.gov/cps/tp/tp63.htm>.

For additional poverty data, browse the Census Bureau poverty website at <http://www.census.gov/hhes/www/poverty/poverty.html>, contact the Census Bureau's Customer Services Center at 1-800-923-8282 (toll free), or visit the Census Bureau's Question & Answer Center at <http://ask.census.gov>.

For further information about technical changes to the poverty measure, contact Bernadette Proctor at (301) 763-3213 or e-mail bernadette.d.proctor@census.gov.

For further information about the statistical reliability of the CPS estimates, contact dsmd_s&a@census.gov.

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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 for persons born in the years 1936 through 1949. The worksheet assumes that the worker had no prior period of entitlement to disability benefits and 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 the 35 highest earnings years (the number of computation years), but only for years after 1950. If there are fewer than 35 years with earnings, then years of no earnings are included among the 35 computation years.
- *To index lifetime earnings.* Earnings used in the computation are not the actual covered earnings but an amount that reflects earnings increases in average wage levels for each year after 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 2011, actual earnings in 1986 of \$20,000 are indexed to \$47,006.15, on the basis of 2009 wage levels. Earnings after age 60 are included at their actual (nominal) value.
- *To replace a portion of the indexed earnings.* Indexed earnings are averaged over the number of computation years to calculate the average indexed monthly earnings (AIME). A benefit formula is applied to the AIME to produce the *primary insurance amount* (PIA), the amount payable to a worker who retires at the full retirement age (FRA). The benefit formula is weighted to provide a higher replacement of earnings for lower-wage workers. The formula for persons aged 62 in 2011 is 90 percent of the first \$749 of AIME; plus 32 percent of the next \$3,768; plus 15 percent of the AIME over \$4,517.
- *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 (age 66 in 2011 but scheduled to increase to age 67 by 2022), plus 5/12 of 1 percent for each of up to 24 earlier months. For a person aged 62 in 2011, the maximum reduction is 25 percent if the individual is entitled to benefits for all 48 months between ages 62 and 66.
- *To provide for price indexing after age 62.* Benefits are adjusted annually in December to reflect

increases in the Consumer Price Index (CPI-W). The benefit increase in 2010 was 0.0 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.
- *To give credit for late retirement.* Persons who do not receive benefits between the FRA and age 69 may receive increased benefits as a result of the delayed retirement credit provision. The benefit is increased by a specified percentage for each month a benefit was deferred. See Table 2.A20 for percentage increases.

Clarifying the Worksheet Procedure

Step 1 - Determining the Number of Computation Years

For workers born in the years 1936 through 1949, 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 year a person attains age 60. Beneficiaries born on January 1 are deemed to have attained age 60 on December 31 of the prior 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, for a person attaining age 62 in 2011, the indexing year is 2009. The average annual wage for 2009 was \$40,711.61. The average annual wage for 1990 was \$21,027.98. The amount \$40,711.61 divided by \$21,027.98 yields a factor of 1.9360685.

The worker's actual earnings covered under Social Security in that year, up to the maximum earnings creditable, are multiplied by the indexing factor to obtain the indexed earnings (see Worksheet 1). For example, actual covered earnings of \$10,000 in 1990, multiplied by 1.9360685, result in indexed earnings of \$19,360.69; actual earnings of \$51,300 (the maximum creditable) result in indexed earnings of \$99,320.31.

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 2011, 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 months = \$952.38, rounded to \$952).

Step 4 - Computing the Primary Insurance Amount (PIA)

The PIA, the amount from which all Social Security benefits payable on a worker's earnings record are based, is computed by applying a formula to the AIME. The formula consists of brackets in which three percentages are applied to amounts of AIME. The dollar amounts defining the brackets are called *bend points*, and the bend points are different for each calendar year of attainment of age 62. The PIA is rounded to the nearest lower 10 cents.

For retired workers who attained age 62 in 2011, the bend points are \$749 and \$4,517. Thus the formula is 90 percent of the first \$749 of AIME; plus 32 percent of the next \$3,768 of AIME; plus 15 percent of AIME above \$4,517. The following are examples of PIA computations for such workers with different AIME amounts.

Example 1 - AIME of \$700

PIA is \$630

Based on: 90 percent of \$700

Example 2 - AIME of \$1,500

PIA is \$914.42 rounded to \$914.40

Based on: 90 percent of \$749 (\$674.10); plus
32 percent of \$751 (\$240.32)

Example 3 - AIME of \$5,000

PIA is \$1,952.31 rounded to \$1,952.30

Based on: 90 percent of \$749 (\$674.10); plus
32 percent of \$3,768 (\$1,205.76); plus
15 percent of \$483 (\$72.45)

The above calculations are applicable to workers who attain age 62 in 2011. 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 2011. Worksheet 2 shows cost-of-living increase factors for 1979 through 2010. After the PIA is calculated for the year of attainment of age 62, cost-of-living increases are applied for each year through 2010. The result is the current 2011 PIA.

For example, a worker who attained age 62 in 2008 would receive cost-of-living adjustments for the years 2008–2010. The adjustments are cumulative, with each

step rounded to the next lower dime. If the PIA at age 62 was \$700, the cost-of-living adjustments would be:

2008: \$700 multiplied by 1.058 = \$740.60

2009: \$740.60 multiplied by 1.000 = \$740.60

2010: \$740.60 multiplied by 1.000 = \$740.60

\$740.60 would be the PIA effective December 2010.

Step 5 - Computation of the Monthly Benefit

The full PIA is payable to a worker who retires at the full retirement age (FRA). In 2000, incremental increases in the FRA—from age 65 for workers born 1937 and earlier to age 67 for workers born 1960 and later—began to be phased in.

Early retirement reduces benefits:

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 FRA. If the number of months preceding FRA exceeds 36, then the benefit is further reduced 5/12 of 1 percent for each of up to 24 earlier months. Workers attaining age 62 in 2011 have their benefits computed based on the FRA of 66. See Table 2.A17.1 to determine the FRA based on the year of birth as well as the reduction factors. For individuals electing benefits at exactly age 62 in 2011, the maximum reduction is 25 percent.

For example, in 2011 a worker with a PIA of \$700 would receive \$525 at age 62. The PIA is reduced by \$175.00, reflecting a reduction rate of 5/9 of 1 percent for each of the first 36 months and a reduction rate of 5/12 of 1 percent for each of the additional 12 months for a total reduction of 25 percent. After reduction of the PIA by \$175.00, the benefit amount is rounded down to the nearest lower dollar.

Delayed retirement increases benefits:

Delayed retirement increases the benefit amount (by a certain percentage depending on a person's date of birth) if the worker delays retirement beyond FRA. Benefit increases stop accumulating when the worker reaches age 70, even if he or she continues to delay taking benefits. Delayed retirement increases begin to apply to benefits in January of the year following the year the worker reaches FRA. The credit given for delayed retirement will gradually reach 8 percent per year (16/24 of 1 percent monthly) for those born 1943 and later. See Table 2.A20 for percentage increases.

For example, a worker born June 1945 will reach FRA in June 2011. If the worker delays receiving benefits until November 2011 (5 months after FRA), his or her benefit will be 103.33% of the PIA. If the worker's PIA is \$700, his or her benefit would increase to \$723.31 rounded to \$723.30.

Instructions for computing a retired-worker benefit (only for workers attaining age 62 in years 1998–2011)

STEP 1.—Determining the Number of Computation Years		
1	Number of Computation Years.	35
STEP 2.—Indexing of Earnings (Use Worksheet 1 for Steps 2 and 3.)		
2	Enter in column 2 your earnings in each year 1951 through 2010. If none, enter “0.”	
3	Column 3 contains the maximum earnings creditable under Social Security for each year.	
4	Enter in column 4 the lower amount from columns 2 or 3 for each year.	
5	Enter in column 5 the indexing factors applicable to the year you attained age 62 from Table 2.A8. (This table contains the indexing factors for persons attaining age 62 during the period 1996–2011.)	
6	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)		
7	Enter the number of computation years from line 1.	35
8	Place an “X” in column 7 next to each of the 35 highest indexed earnings entries.	
9	Add all individual indexed earnings marked with an “X.”	
10	Number of months in the computation period.	420
11	Divide line 9 by line 10.	
12	Round the result in line 11 to the 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.)		
13	Enter first bend point from Worksheet 2 based on year of attainment of age 62. (If your birthday is January 1, enter prior year.)	
14	Enter second bend point from Worksheet 2.	
15	If your AIME (obtained in line 12) is equal to or less than line 13, complete line 16, otherwise skip to line 17.	
16	Multiply line 12 by 0.9. (If you receive a pension on the basis of noncovered employment, see Table 2.A11.1.) Round to next lower dime to obtain your PIA at age 62. Continue with line 26.	
17	If your AIME (obtained in line 12) is greater than line 13 but less than or equal to line 14, complete lines 18–20, otherwise skip to line 21.	
18	Multiply line 13 by 0.9. (If you receive a pension on the basis of noncovered employment, see Table 2.A11.1.)	
19	Subtract line 13 from line 12 then multiply by 0.32.	
20	Add line 18 to line 19, and round to next lower dime to obtain your PIA at age 62. Continue with line 26.	
21	If your AIME (obtained in line 12) is greater than line 14, complete lines 22–25.	
22	Multiply line 13 by 0.9. (If you receive a pension on the basis of noncovered employment, see Table 2.A11.1.)	
23	Subtract line 13 from line 14 then multiply by 0.32.	
24	Subtract line 14 from line 12 then multiply by 0.15.	
25	Add lines 22, 23, and 24, and round to the next lower dime to obtain your PIA at age 62. Continue with line 26.	
26	If you attained age 62 in 2011, skip to line 32. Otherwise you will need to adjust your PIA to reflect cost-of-living adjustments (COLAs) from the year you attained age 62 through 2010 by using lines 27–31 and Worksheet 2.	
27	Enter year of attainment of age 62.	
28	Place an “X” corresponding to the year you attained age 62 in column 5 (Worksheet 2).	
29	Place an “X” in column 5 (Worksheet 2) next to each subsequent year through 2010.	
30	Enter your PIA at age 62 from either line 16, 20, or 25—here and in the first row of column 6 (Worksheet 2).	
31	Beginning with first year marked, multiply your PIA at age 62 by the corresponding factor (column 4), round to the next lower dime, and enter in column 6. The resulting PIA is then multiplied by the next factor and is again rounded to the next lower dime. Continue this process through 2010. Enter this last figure, which is your current PIA.	

(Continued)

Instructions for computing a retired-worker benefit (only for workers attaining age 62 in years 1998–2011)—Continued

STEP 5.—Computing the Monthly Benefit

32	Enter your current PIA from either line 16, 20, 25, or 31.	
33	Using Table 2.A17.1, determine your full retirement age and enter here.	
34	If you retired at your full retirement age, round PIA from line 32 to the next lower dollar to obtain your monthly benefit. If you retired before the full retirement age, skip to line 35. If you retired after the full retirement age, skip to line 45.	
35	If you retired before the full retirement age, enter your age at retirement in years and months, and complete lines 36–44.	
36	Subtract line 35 from line 33, and convert the result to months to determine the total number of reduction months.	
37	If line 36 is greater than 36 reduction months, subtract 36 months and enter the result here.	
38	“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
39	“0.0041667” (the decimal equivalent of 5/12 of 1 percent—the monthly reduction factor for months above 36) has been entered.	0.0041667
40	Multiply line 36 (but not more than 36 months) by line 38 to obtain the percent reduction for the first 36 months.	
41	Multiply line 37 by line 39 to obtain the percent reduction for months in excess of 36.	
42	Add line 40 to line 41 to obtain the total percent reduction.	
43	Multiply line 32 by line 42 to obtain the amount of benefit reduction.	
44	Subtract line 43 from line 32, and round to the next lower dollar to obtain your monthly benefit.	
45	If you retired (or plan to retire) after the full retirement age, enter your actual (or planned) age at retirement in years and months, and complete lines 46–50. If you worked (or plan to work) after attaining age 70, enter “70 years 0 months.”	
46	Subtract line 33 from line 45, and convert the result to months to determine the total number of delayed months.	
47	“0.006667” (the decimal equivalent of 16/24 of 1 percent—the monthly percentage increase for persons born 1943 or later) has been entered.	0.006667
48	Multiply line 46 by line 47 to obtain the total percent increase.	
49	Multiply line 32 by line 48 to obtain the amount of benefit increase.	
50	Add line 32 to line 49, and round to the next lower dollar to obtain your monthly benefit.	

Worksheet 1: Indexing of earnings

Year	Your earnings	Maximum taxable earnings (dollars)	Lower of columns 2 or 3	Indexing factor	Column 4 times column 5	Highest indexed earnings
1	2	3	4	5	6	7
1951		3,600				
1952		3,600				
1953		3,600				
1954		3,600				
1955		4,200				
1956		4,200				
1957		4,200				
1958		4,200				
1959		4,800				
1960		4,800				
1961		4,800				
1962		4,800				
1963		4,800				
1964		4,800				
1965		4,800				
1966		6,600				
1967		6,600				
1968		7,800				
1969		7,800				
1970		7,800				
1971		7,800				
1972		9,000				
1973		10,800				
1974		13,200				
1975		14,100				
1976		15,300				
1977		16,500				
1978		17,700				
1979		22,900				
1980		25,900				
1981		29,700				
1982		32,400				
1983		35,700				
1984		37,800				
1985		39,600				
1986		42,000				
1987		43,800				
1988		45,000				
1989		48,000				
1990		51,300				
1991		53,400				
1992		55,500				
1993		57,600				
1994		60,600				
1995		61,200				
1996		62,700				
1997		65,400				
1998		68,400				
1999		72,600				
2000		76,200				
2001		80,400				
2002		84,900				
2003		87,000				
2004		87,900				
2005		90,000				
2006		94,200				
2007		97,500				
2008		102,000				
2009		106,800				
2010		106,800				

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	2.7	1.027		
2005	627	3,779	4.1	1.041		
2006	656	3,955	3.3	1.033		
2007	680	4,100	2.3	1.023		
2008	711	4,288	5.8	1.058		
2009	744	4,483	0.0	1.000		
2010	761	4,586	0.0	1.000		
2011	749	4,517	...	...

NOTE: ... = not applicable.

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

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GLOSSARY, ABBREVIATIONS, AND INDEX TO TABLES



Glossary

actuarial reduction (OASDI). Reduction in monthly benefit amount payable on—

1. Entitlement prior to full retirement age if the beneficiary is a retired worker, a wife or husband of a retired or disabled worker (with entitlement not based on caring for a child beneficiary), divorced spouse, a widow(er), or a surviving divorced spouse; or
2. Entitlement, in case of disability, at ages 50–59 if the beneficiary is a widow(er) or surviving divorced spouse.

For formulas used to compute the reduction, see “Benefit Types and Levels” in the section Social Security (Old-Age, Survivors, and Disability Insurance).

administrative law judge—ALJ. An official of the Social Security Administration’s (SSA’s) Office of Disability Adjudication and Review who is specially qualified by education and experience to hold hearings and make independent decisions regarding eligibility for SSA programs based on all the evidence and testimony. ALJs conduct impartial hearings and issue decisions to individuals who have appealed previous determinations by SSA. See also **administrative review process**.

administrative review process (OASDI and SSI). The procedures followed by the Social Security Administration (SSA) in determining one’s right under Title II and Title XVI of the Social Security Act. The administrative review process consists of several steps, which must usually be requested within certain time periods, in the following order: initial determination, reconsideration, decision of the administrative law judge, and a review by SSA’s Appeals Council.

1. *Initial determination.* A determination SSA makes about an individual’s entitlement to benefits or about any other matter that gives that person a right to further administrative and/or judicial review.
2. *Reconsideration.* The first step in the administrative review process. When an individual disagrees with the initial determination, the individual may, within 60 days of receiving notice of the initial determination, ask SSA to reconsider the decision.
3. *Hearing before an administrative law judge (ALJ).* When an individual disagrees with the reconsidered determination, he or she may, within 60 days of receiving notice of the determination, request a hearing before an ALJ.
4. *Appeals Council review.* When an individual disagrees with the decision or dismissal by the ALJ, he or she may, within 60 days of receiving the hearing decision, request that the Appeals Council review that decision. The Appeals Council, within the Office of Disability Adjudication and Review, may deny or dismiss the request for review, or grant the request and either issue a decision or remand (return) the case to an ALJ. The Appeals Council may also review any ALJ action on its own motion within 60 days after the ALJ’s action. The Appeals Council’s decision, or the hearing decision if the Council denies the request for review, represents SSA’s final decision in the administrative review process. See **expedited appeals process** and **federal court review**.

adult (SSI). A person older than age 21, aged 18–21 who is not regularly attending school, or a person under 21 who is married or the head of a household.

age (OASDI). In tables showing beneficiaries in current-payment status, the age classification is based on the age of the person at his or her last birthday. In tables showing awards data, age is the beneficiary’s age in the month of award or age in year of the award, as specified.

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). The amount a physician or provider is allowed to charge Medicare 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 are 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 elapsed after attaining age 21 (or 1950, if later) until the year in which the worker attains age 62, becomes disabled, or dies, minus the number (generally 5) of lowest-earnings years dropped out of the computation (the 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 according to the age attained in year of disability onset. For workers aged 26 or younger, the number of dropout years is 0; for those aged 27–31, 32–36, 37–41, 42–46, and 47 or older, the numbers are 1, 2, 3, 4, and 5, respectively. After June 1981, however, disabled workers may obtain additional dropout years (up to 3, 2, and 1, respectively, for those aged 26 or younger, 27–31, and 32–36) for each year the workers had no earnings and were living with a child (their own or their spouse’s) 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 average indexed monthly earnings (AIME) method. The AMW is computed by—

1. Determining the number of computation years—the number of years elapsed after attaining age 21 (or 1950, if later) until 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

the number (generally 5) of lowest-earnings years dropped out of the computation (the 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 average indexed monthly earnings or 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, references to the CPI relate to the CPI for Urban Wage Earners and Clerical Workers (CPI-W), unless otherwise noted.

continuing disability review (DI and SSI). A periodic review to determine if a disabled individual is still medically eligible to receive benefits.

contributions (OASDI and Medicare). The amount based on a percentage of earnings, up to an annual maximum, that must be paid by—

1. Employers and employees on wages from employment under FICA (Federal Insurance Contributions Act),
2. The self-employed on net earnings from self-employment under SECA (Self-Employment Contributions Act), and
3. States on the wages of state and local government employees covered under the Social Security Act through voluntary agreements under section 218 of the Act.

Generally, employers withhold contributions from wages, add an equal amount of contributions, and pay both on a current basis. Also referred to as “taxes.” See Table 2.A3.

conversion of benefits (OASDI). See **award (OASDI)**.

cost-of-living adjustment—COLA. Social Security benefits and Supplemental Security Income payments are increased each year to keep pace with increases in the cost of living (inflation). The Consumer Price Index is used to compute COLA increases.

cost sharing (Medicare). The generic term that includes copayments, coinsurance, and deductibles.

- *Copayments*—Flat fees, typically modest, that insured persons must pay for a particular unit of services, such as an office visit, emergency room visit, or the filling of a prescription.

-
- *Coinsurance*—Portion of the costs paid by the beneficiary after meeting the annual deductible.
 - *Deductibles*—The annual amount payable by the beneficiary for covered services before Medicare makes reimbursement.

couple (SSI). See **eligible couple**.

covered earnings (OASDI). Earnings in employment covered by the OASDI programs.

covered employment (OASDI). All employment and self-employment creditable for Social Security purposes.

covered worker (OASDI). A person who has earnings creditable for Social Security purposes on the basis of services for wages in covered employment or on the basis of income from self-employment.

creditable coverage (Medicare). Alternative prescription drug coverage in which the actuarial value of the coverage equals or exceeds the actuarial value of standard Medicare prescription drug coverage, as demonstrated through the use of generally accepted actuarial principles and in accordance with Centers for Medicare & Medicaid Services actuarial guidelines. In the absence of creditable coverage, a late enrollment penalty is imposed on beneficiaries who delay signing up for Part D after their initial enrollment period.

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). Accounting for the income and resources of certain persons who live with an SSI recipient when determining the payment amount. These persons include the ineligible spouses of adult recipients, the ineligible parents of child recipients under age 18, and the immigration sponsor for certain noncitizens.

delayed retirement credit (OASDI). A credit that increases the benefit amount for certain individuals who did not receive benefits for months after attainment of the full retirement age but before age 70. Delayed retirement credit increases are applicable for benefits beginning January of the year following the year the individual attains full retirement age.

Each monthly credit serves as a basis for increasing the monthly benefit (unless the benefit is based on a special minimum primary insurance amount [PIA]) 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 category, regardless of the actual cost of care for the individual.

direct deposit (OASDI and SSI). A method of payment whereby beneficiaries have their monthly benefits sent electronically to financial institutions they designate. Also referred to as electronic funds transfer (EFT).

disability (DI). The inability to engage in substantial gainful activity (SGA) by reason of any medically determinable physical or mental impairment that can be expected to result in death or can be expected to last for a continuous period of not less than 12 months. Special rules apply for workers aged 55 or older whose disability is based on blindness.

The law generally requires that a person be disabled continuously for 5 full months before he or she can qualify for a disabled-worker benefit.

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 step-child 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**.

dropout years (OASDI). Years dropped out of the computation period in determining average indexed monthly earnings (AIME). Dropout years are those with the lowest earnings during the worker's lifetime. The number of years dropped out of the computation period is generally the maximum of 5, but can vary, depending primarily on the worker's age at death or disability onset. Other factors may apply. See **average indexed monthly earnings—AIME**.

drug addiction and alcoholism (OASDI and SSI). Legislation enacted in 1996 eliminated drug addiction and alcoholism 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 benefit, usually a spouse's 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 non-covered employment. The offset reduces the Social Security benefit amount by two-thirds of the amount of the government pension.

For more information, see "Government Pension Offset" in the section Social Security (Old-Age, Survivors, and Disability Insurance).

gross domestic product—GDP. The total dollar value of all goods and services produced by labor and property located in the United States, regardless of who supplies the labor or property.

health maintenance organization (Medicare). One of several competitive medical plans, including Medicare Advantage, that have contracts with the Centers for Medicare & Medicaid Services on a prospective capitation basis for providing health care to Medicare beneficiaries.

home health agency (Medicare and Medicaid). A public or private organization that provides skilled nursing services and other therapeutic services in the patient's home and that meets certain conditions to ensure the health and safety of the individual.

home health services (Medicare and Medicaid). Items furnished in a patient's home under the care of physicians. These services are furnished under a plan established and periodically reviewed by a physician. They include part-time or intermittent skilled nursing care; physical, occupational, or speech therapy; medical social services; medical supplies and appliances (other than drugs and biologicals); home health aid services; and services of interns and residents.

hospice (Medicare and Medicaid). A public agency or private organization that is primarily engaged in providing pain relief, symptom management, and supportive services to patients that are certified to be terminally ill. Medicare beneficiaries may elect to receive hospice care instead of standard Medicare benefits for terminal illnesses.

husband's benefit (OASDI). Monthly benefit payable to a husband or a divorced husband (aged 62 or older) of a retired or disabled worker. See **spouse's benefit**.

independent laboratory services (Medicare). Diagnostic laboratory tests ordered by a physician and performed in a laboratory independent of a physician's office or a hospital.

inpatient hospital services (Medicare). Items and services furnished to an inpatient of a hospital by the hospital, including room and board, nursing and related services, diagnostic and therapeutic services, and medical or surgical services.

institutionalization (Medicaid and SSI). Living arrangements for persons in public or private institutions when more than 50 percent of the cost of their care is met by the Medicaid program.

insured status (OASDI). The state of having sufficient quarters of coverage to meet the eligibility requirements for retired-worker or disabled-worker benefits or to permit the worker's spouse and children or survivors to establish eligibility for benefits in the event of his or her disability, retirement, or death. For qualifications, 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 subsidy (Medicare). Financial assistance for beneficiaries with limited income and resources. Eligible beneficiaries receive assistance in paying their monthly premium, yearly deductible, prescription coinsurance, and copayments.

lump sum death benefit (OASDI). A one-time payment, generally \$255, payable upon the death of a fully or currently insured worker. The lump sum is payable to the surviving spouse of the worker, under most circumstances. If there is no spouse, the lump sum is payable to the worker's entitled children.

managed care (Medicare). Includes health maintenance organizations, competitive medical plans, and other plans that provide health services on a prepayment basis which is either based on cost or risk depending on the type of contract they have with Medicare. See also **Medicare Advantage**.

mandatory minimum state supplementation (SSI). Required by federal law for individuals converted to the Supplemental Security Income program from state assistance programs for the aged, blind, or disabled. This provision insures that monthly income will not be less than the amount received under the former state programs.

maximum family benefit (OASDI). The maximum monthly amount that can be paid on a worker's earnings record. Whenever the total of the individual monthly benefits payable to all the beneficiaries entitled on one earnings record exceeds the maximum, each dependent's or survivor's 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, and the beneficiary is expected to use that money to pay for medical expenses above the annual deductible.

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 four separate but coordinated programs—Part A (Hospital Insurance), Part B (Supplementary Medical Insurance), Part C (Medicare Advantage) and Part D (Prescription Drug Coverage).

Medicare Advantage. An expanded set of options for the delivery of health care under Medicare established by the Balanced Budget Act of 1997. Most Medicare beneficiaries can choose to receive benefits through the original fee-for-service program or through one of the following Medicare Advantage plans: (1) coordinated care plans (such as health maintenance organizations, provider sponsored organizations, and preferred provider organizations); (2) medical savings account/deductible plans; 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 \$968.20, and an SMI premium of \$99.90 is deducted, the MBC is \$967.90 (calculated as follows: $\$968.20 - \$99.90 = \$868.30$ rounded down to $\$868.00 + \$99.90 = \$967.90$).

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 as well as to survivors of deceased insured workers (OASI), and
2. Disabled-worker beneficiaries and their spouses and children (DI). Rehabilitation services are also provided for disabled beneficiaries.

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 either 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, or are placed by agencies in private households; and to 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 insurer 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 average indexed monthly earnings (AIME) 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 Railroad Retirement Act provides 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.

Retiree Drug Subsidy (Medicare). One of several options under Medicare that enables employers and unions to continue assisting their Medicare-eligible retirees in obtaining more generous drug coverage. In turn, employers and unions are subsidized for providing this alternative coverage.

retirement age (OASI). The age at which an individual establishes entitlement to retirement benefits. See **full retirement age**.

retirement earnings test (OASDI). See **earnings test**.

secondary benefit (OASDI). Monthly benefit payable to a spouse or child of a retired or disabled worker, or to a survivor of a deceased worker.

Section 1619(a) (SSI). See **special cash payments**.

Section 1619(b) (SSI). See **special recipient status**.

self-employed (OASDI and HI). One who derives income from the operation of a partnership or nonincorporated trade or business.

skilled nursing facility (Medicare). An institution that has a transfer agreement with one or more participating hospitals, is primarily engaged in providing skilled nursing care and rehabilitative services to inpatients, and meets specific regulatory certification requirements.

Social Security number (OASDI and HI). A nine-digit number used to identify the record of earnings an individual has in employment or self-employment covered by Social Security and Medicare.

Social Security Act. Public Law 74-271, enacted August 14, 1935, with subsequent amendments. The Social Security Act consists of 21 titles, of which three have been repealed.

special age-72 benefit (OASI). Monthly benefit payable to men who attained age 72 before 1972 and to women who attained age 72 before 1970 and who do not have sufficient quarters of coverage to qualify for a retired-worker benefit under either the fully or the transitionally insured status provisions. (Also known as **Prouty benefits**.)

special cash payments (SSI). Continuing cash benefits for disabled individuals whose gross earned income is at the amount designated as the substantial gainful activity level. The person must continue to be disabled and meet all other eligibility rules.

special minimum PIA (OASDI). An alternative primary insurance amount (PIA) based on the worker's length (years) of covered employment. It is designed to help those who worked in covered employment for many years but had low earnings. See Table 2.A12 for computation of the special minimum PIA.

special recipient status (SSI). For Medicaid purposes, provides special status to working disabled or blind individuals when their earnings make them ineligible for cash payments.

specified low-income Medicare beneficiaries (Medicare and Medicaid). Persons who meet all Qualified Medicare Beneficiary requirements except that their incomes are slightly higher, though less than 120 percent of the federal poverty level. Medicaid pays their Part B (Supplementary Medical Insurance) premium.

spell of illness (Medicare). A period of consecutive days beginning with the first day on which a beneficiary is furnished inpatient hospital or extended care services and ending with the close of the first period of 60 consecutive days thereafter in which the beneficiary is in neither a hospital or skilled nursing facility.

spouse's benefit (OASDI). Monthly benefit payable to a spouse or a divorced spouse of a retired or disabled worker under one of the following conditions:

1. The spouse is aged 62 or older or has an entitled child of the worker in his or her care who is under age 16 or is disabled; or
2. The divorced spouse is aged 62 or older and was married to the worker for 10 years before the divorce became final. Effective with benefits payable after December 1984, a divorced spouse of an eligible worker can be entitled to benefits if he or she meets the requirements for entitlement and has been divorced for at least 2 years, regardless of whether the worker has filed for benefits or has benefits withheld due to the earnings test. Effective with benefits payable beginning January 1991, the 2-year period is waived if the worker was entitled to benefits before the divorce. The earnings test will continue to apply to the divorced spouse's own earnings; or
3. Effective with benefits payable beginning January 1991, a deemed spouse (including a divorced deemed spouse), regardless of whether the legal spouse is entitled to benefits on the same earnings record. A deemed spouse is a person who entered into an invalid ceremonial marriage in good faith.

state-administered supplementation (SSI). See **state supplementation.**

state supplementation (SSI). Payments to eligible persons made under state provisions. These payments may vary by the recipient's living situation and by geographic area within the state. The payments are federally and state administered.

student benefit (OASDI). Child's benefit payable to a full-time unmarried elementary or secondary school student aged 18–19. Student benefits continue through the earlier of the month the course is completed, the second month after the month the child attains age 19 if the school operates on a yearly basis, or the final month of the quarter or semester that is in progress when the child reaches age 19 if the school operates on a quarterly or semester basis.

substantial gainful activity (DI and SSI). Remunerative work that is substantial, as determined by the amount of money earned, 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 in covered employment and/or covered self-employment income at or below the annual maximum taxable amount (see Table 2.A3 for amounts).

For wage earners, taxable earnings may consist of:

1. *Social Security taxable wages.* For each employee, employers are required to report calendar-year wages paid up to the taxable limit, and pay the employer share of Social Security tax on this reported amount. Multiple jobholders whose total reported wages exceed the taxable limit are due a refund on taxes withheld beyond the limit. Employers are not due a refund on their share of these taxes. Reported tip income is taxable

(subject to the taxable limit) for employees beginning in 1966 and for employers beginning in 1988. For employers from 1980 through 1987, only the amount of tips added to wages to ensure an employee was paid the federal minimum wage was taxable.

2. **Medicare taxable wages.** Wages were first taxable for Medicare in 1966. Through 1982, employment covered by Social Security was also covered by Medicare. Beginning in 1983, the wages of all federal civilian employees in the Civil Service Retirement System are covered by Medicare only. Also, all state and local government employees hired for positions not covered by Social Security on April 1, 1986 and later are covered by Medicare only. The Medicare annual maximum taxable limit was the same as that for Social Security from 1966 through 1990. The limit was set by law at \$125,000 for 1991, indexed for 1992 and 1993, and eliminated beginning in 1994.

For the self-employed, earnings are likewise subject to both Social Security and Medicare taxes. Taxable earnings consist of net self-employment income which, when combined with any taxable wages for that individual, is at or below any applicable annual maximum taxable amount.

taxable maximum (OASDI and HI). See **annual maximum taxable limit.**

taxable self-employment income (OASDI and HI). See **taxable earnings.**

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, in which the beneficiary is entitled to the same type of benefit on more than one earnings record; and (2) Potential dual entitlement, in which 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 Disability Insurance—TDI. Sometimes called cash sickness benefits, TDI provides workers with partial compensation for loss of wages caused by temporary nonoccupational disability. Only five states, Puerto Rico, and the railroad industry have TDI laws.

termination (OASDI). Cessation of payment of a specific type of benefit because the beneficiary is no longer entitled to receive it. For example, benefits might terminate as a result of the death of the beneficiary, the recovery of a disabled beneficiary, or the attainment of age 18 by a child beneficiary. In some cases, the individual may become immediately entitled to another type of benefit (such as the conversion of a disabled-worker beneficiary at full retirement age to a retired-worker beneficiary).

totalization (OASDI). International agreements that coordinate the U.S. Social Security programs with the Social Security programs of other countries are called “totalization agreements.”

trust fund (OASDI and Medicare). Four separate accounts in the U.S. Treasury in which are deposited the equivalent of taxes received under the Federal Insurance Contributions Act, the Self-Employment Contributions Act, contributions dealing with coverage 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.

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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 U.S. 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 receive a pension from a job for which they did not pay Social Security taxes, but who would benefit from provisions aimed at low earners. The WEP reduces the PIA for retired and disabled workers and affects the computation of benefits for these workers and their spouses and children, but does not apply to survivor benefits.

For information about the WEP computation, see "Windfall Elimination Provision" in the section Social Security (Old-Age, Survivors, and Disability Insurance), and Table 2.A11.1.

withholding (OASDI). Suspension of benefit payments until the condition(s) causing deductions are known to have ended. The suspension does not affect eligibility for Hospital Insurance benefits.

worker (OASDI). A person who has earnings creditable for Social Security purposes on the basis of services for wages in covered employment or on the basis of income from covered self-employment. Data on covered self-employment exclude self-employed persons who had no self-employment income taxable or creditable under Social Security because they had wages or salaries reaching the annual taxable maximum reported for the same year.

workers' compensation and public disability benefit offset (DI). A requirement that reduces the benefits to a disabled worker and dependents if the worker also receives workers' compensation (WC) or other public disability benefits (PDB). The reduction continues until the month the worker reaches age 65 or the month the WC/PDB payments stop, whichever comes first.

Abbreviations

ACR	Adjusted Community Rate
AFDC	Aid to Families with Dependent Children
AIME	Average indexed monthly earnings
AMW	Average monthly wage
APTD	Aid to the Permanently and Totally Disabled
BBA	Balanced Budget Act of 1997
CDR	Continuing disability review
CHAMPVA	Civilian Health and Medical Program of the Department of Veterans Affairs
CHIP	Children's Health Insurance Program
CMS	Centers for Medicare & Medicaid Services
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
DOL	Department of Labor
DRA	Deficit Reduction Act of 2005
DRG	Diagnosis-related group
DSH	Disproportionate share hospital
EPSDT	Early and Periodic Screening, Diagnostic, and Treatment program
ESRD	End-stage renal disease
FDA	Food and Drug Administration
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
HCFA	Health Care Financing Administration
HHA	Home health agency
HHS	Department of Health and Human Services
HI	Hospital Insurance
HMO	Health maintenance organization
IPCDM	Incentives for Prevention of Chronic Diseases in Medicaid
IRS	Internal Revenue Service
LCCP	Local coordinated care plans
LIS	Low-income subsidy
MA	Medicare Advantage

MAC	Medicare Administrative Contractor
MBC	Monthly benefit credited
MBR	Master Beneficiary Record
MIP	Medicare Integrity Program
MMA	Medicare Prescription Drug, Improvement, and Modernization Act
MN	Medically needy
MSA	Medical savings account
NRC	National Research Council
OASDI	Old-Age, Survivors, and Disability Insurance
OASI	Old-Age and Survivors Insurance
OBRA	Omnibus Budget Reconciliation Act
PACE	Programs of all-inclusive care for the elderly
PDP	Prescription Drug Plan
PFFS	Private fee-for-service
PIA	Primary insurance amount
PPO	Preferred provider organization
PPS	Prospective payment system
QC	Quarter of coverage
QI	Qualifying individual
QMB	Qualified Medicare beneficiary
RDS	Retiree Drug Subsidy
SCHIP	State Children's Health Insurance Program
SECA	Self-Employment Contributions Act
SGA	Substantial gainful activity
SLMB	Specified low-income Medicare beneficiary
SMI	Supplementary Medical Insurance
SNF	Skilled nursing facility
SPM	Supplemental Poverty Measure
SSA	Social Security Administration
SSI	Supplemental Security Income
TANF	Temporary Assistance for Needy Families
TDI	Temporary Disability Insurance
VA	Department of Veterans Affairs
VEAP	Veterans' Educational Assistance Program
WEP	Windfall Elimination Provision

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